ALASKA LEGISLATURE COMMITTEE FILES 1985-1986 8672

3918 SHES SB 51

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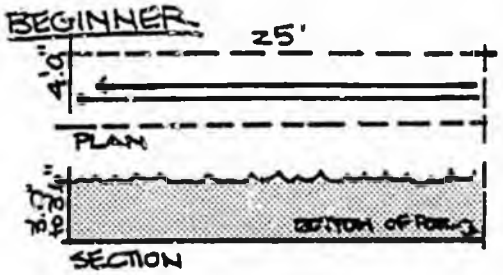
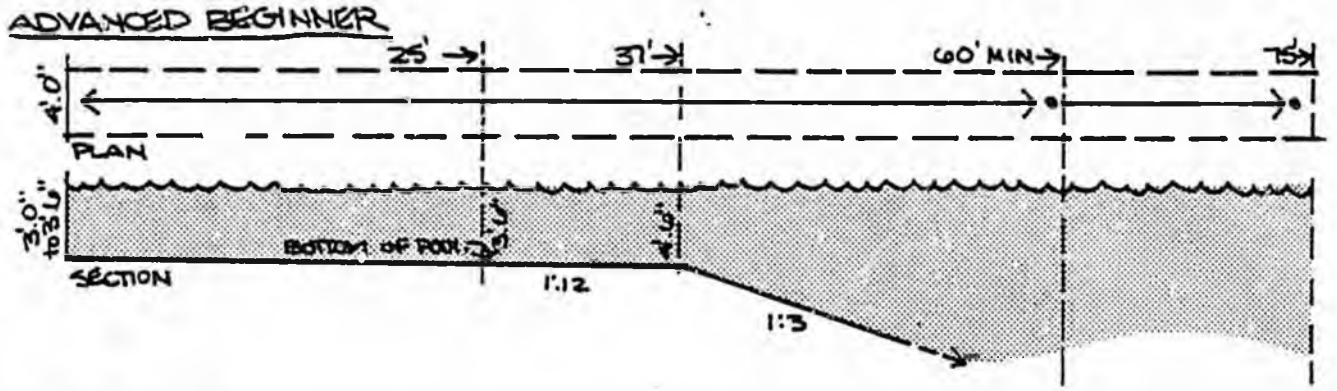
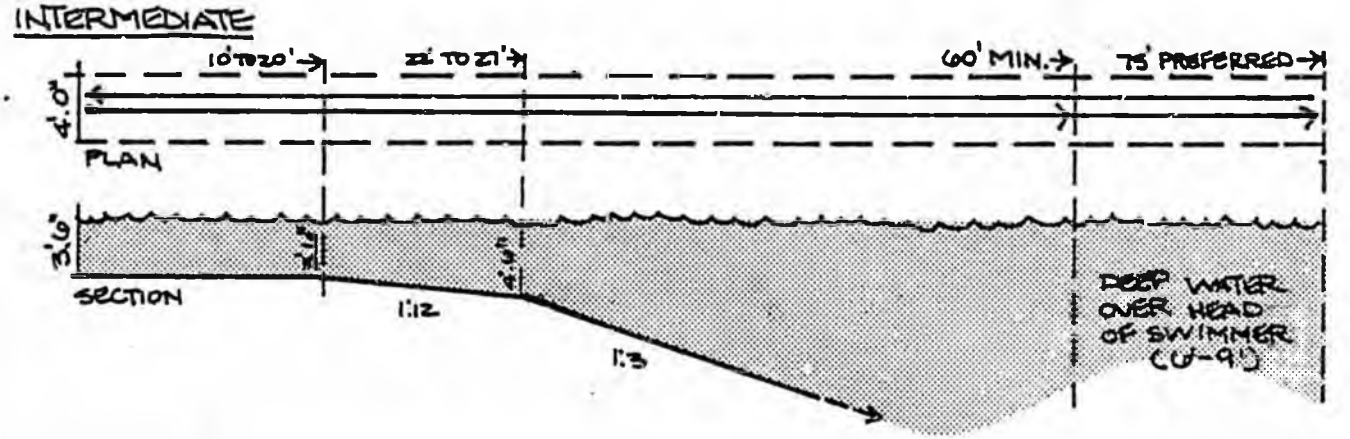
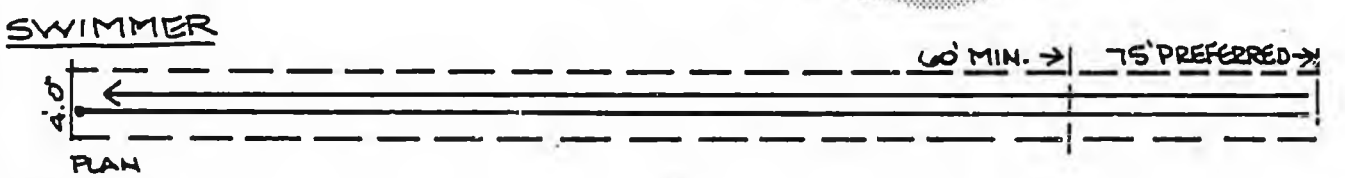
Chart 2 Space required for a single swimmer (varying abilities)



This chart illustrates minimum recommended lane widths and water depths for a typical instructional program offering, Beginning, Advanced Beginning and Intermediate Swimming. Swimmer Program with Diving instruction is also illustrated.







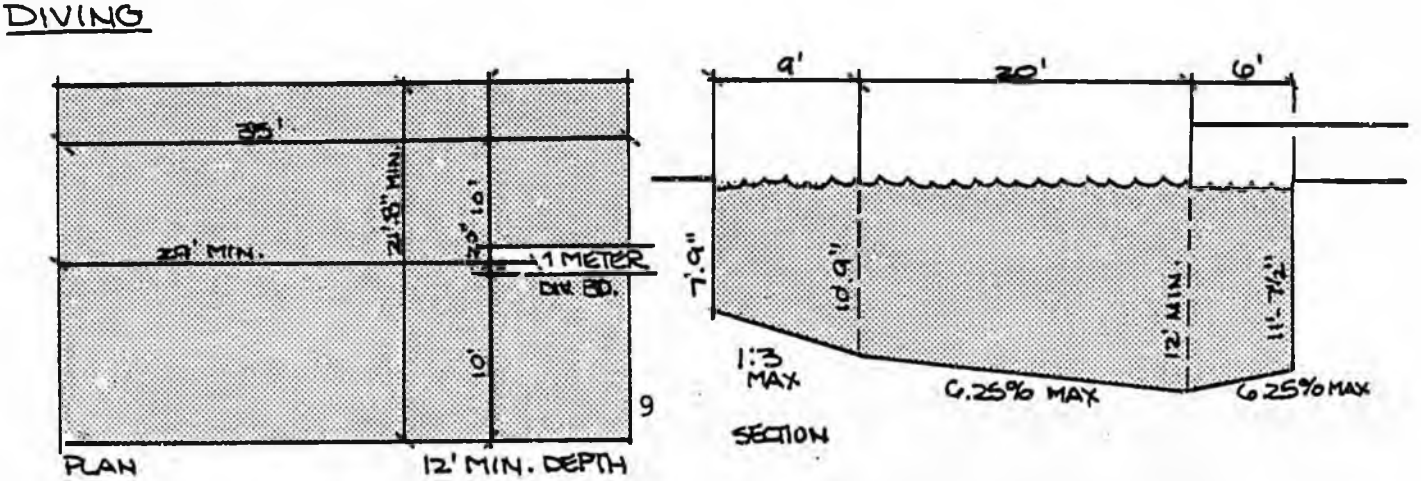
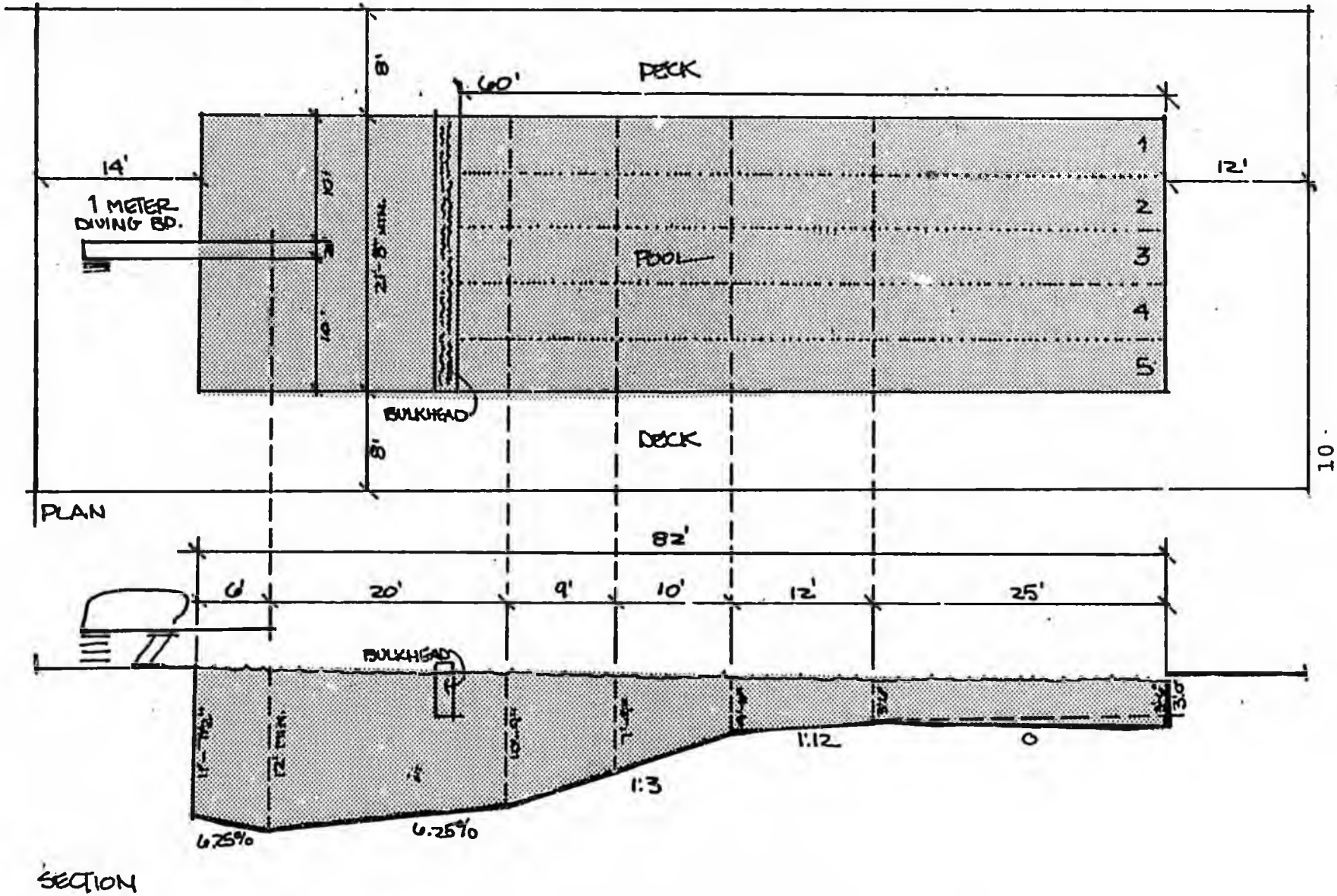


Chart 3 Space requirements

Pool design using Swimmer/Diving Program requirements.



D. GENERAL RECOMMENDATIONS

Based on an analysis of instructional needs as illustrated in the following chapter, a School District should select the smallest pool size that would meet program and student population goals. Assuming, however, that the pool has primary uses for school instruction, community use, and possibly some interscholastic competitive and athletic event swimming certain general recommendations can be made.

NOTE: The Department will not grant a variance for "Competition Size" and above. However, the district may decide to use local resources for this purpose.

RECOMMENDATIONS

1. If affordable, the optimum size pool to offer a full program of courses as outlined on the preceding pages is, 75' x 25' or 30'. This meets minimum requirements for instruction programs, boating safety and recreational swimming, and would meet minimum requirements for some interscholastic competition.

2. For a small program of required instruction with 10 students per class, a 20' or 22' x 60' pool is recommended. For 8 students per class the pool width could be reduced to 16'. However, this is not a versatile width for optimum usage.

3. For a strictly elective program, stressing boating safety, a pool must be at least 25' x 40'. This is also the absolute minimum size to offer a small program of intermediate instruction, but is not recommended by the Red Cross for such a program. The minimum size pool for offering a mandatory and elective program should be 25' by 50'.

4. If diving is to be emphasized it is important that the full 12' diving depth be directly under the last 1 1/2' of the diving board. An "L" shaped pool which isolates the diving area is most desirable.

5. To pick the most versatile depths for these pool sizes, use diving tank requirements for one end, 3' 6" for intermediate depth, and depending on community use concerns possibly a small section of 3' 0" depth at shallow end (or a removable insert in a 3' 6" shallow end.)

A district developing a swimming facility must take into considertion the following cost factors in planning the district's operating budget:

a. pool maintenance and repair

b. utilities

c. possible increased costs for additional instructors/staff

d. community use of pool could be a source of income but will also increase maintenance, repair and staff cost

e. possible increased expenses to transport students to and from the facility

f. increased insurance costs

III. Allowable pool sizes

Chart 4 on the next page summarizes a representative sample of recommended pool sizes and the student population that can be served by each, in a district offering a basic swimming program consisting of 3 required courses. (See Appendix for the assumptions and calculations used in determining this information)

NOTE: The "Olympic pool" of 45' x 82' (25 meters) included in the chart for comparative purposes, is not eligible for debt retirement as it is deemed "competition size" under AS 14.11.100. A district needing this pool size to meet program requirements must reduce pool dimensions to be fully eligible for debt retirement. A width of 42' or 44' wide and length of 75' are also acceptable for this type of pool.

Chart 4

SUMMARY OF STANDARD POOL SIZES AND POPULATIONS SERVED

POOL DIMENSIONS	POOL AREA SQ.FT.	STUDENTS PER CLASS PERIOD	STUDENTS PER YEAR ABLE TO RECEIVE MANDATORY COURSES	TOTAL POPULATION SERVED 100% BASIC SWIM PROGRAM			TOTAL POPULATION SERVED 50% BASIC SWIM PROGRAM		
					NUMBER OF YEARS OFFERED.				
				Enrollees per Yr. in all 3 classes	Second. Only (6 yrs)	Elem. & Sec. (12 yrs)	Enrollees Per yr. in all 3 classes	Second. yr. (6 yrs)	Elem. yrs. (6 yrs)
1. Recommended Min. 22' x 82'	1,804	20	480	160	960	1,920	80	480	960
2. Stand. Instruc. 30' x 60'	1,800	20	480	160	960	1,920	80	480	960
3. Min. Competitive 28' x 75' or 28' x 82' (25 meters)	2,100 2,296	30	720	240	1,440	2,880	120	720	1,440
4. "Montreal" 36' x 75' or 36' x 82' (25 meters)	2,700 2,952	50	1,200	400	2.400	4,800	200	1,200	2,400
5. L Shape 45' x 82' (25 meters) and 45' x 30' (diving)	3,690 1,350	100	2,400	800	4,800	9,600	400	2,400	4,800
6. "Olympic" 45' x 82' (25 meters)	3,690	75	1,800	600	3,600	7,200	300	1,800	3,600

A. METHOD FOR DETERMINING ALLOWABLE SIZE

There is of course, no precise formula for determining pool size. It is based on the district's analysis of current program needs, anticipated growth, operations and maintenance costs vs. available budget, etc. The following steps are a likely approach to determining pool size:

1. Identify program requirements (K-12)

   a. Using the course lists on pages 5-7, determine the number of mandatory and elective course offerings and the grade level

      Example

      - District will have 1/2 semester (quarter) mandatory instruction in Beginning Swimming, Advanced Beginning Swimming and Intermediate Swimming for each able student in the District between 5th and 12th grades.
      - At the secondary level the district wants to offer 1/2 semester (quarter) elective courses each year in Junior Life Saving, Advanced Swimming and Basic Water Safety.
      - Other programs will be given in the evening or after school.

   b. From the recommended in-water hours determine the number of class periods necessary to complete each course. 10 students per class is optimum.

Example

- District schools (includes 10 yr. growth projection):

  1 high school/200 students 200
  3 elem. schools/+ 60 students at 5th grade and above 60

  Total population to be served: 260

  Number of instructors: 1
  Number of class periods/day: 5

- Possible courses in one year:

  5 periods/day
  x2 courses/semester (25 in-water hours/course)
  x2 semesters/yr =

  20 courses/yr
  x10 students per class =

  200 students/yr.

- Number of course periods available for 3 mandatory courses:

  8 yrs. available (5-12)
  x20 courses/yr. =

  160 courses available for each student to take 3 courses

- If each course can accommodate an optimum of 10 students then:

  160 courses
  x10

  1600 students could be taught mandatory courses

  1600 / 3 = 533 students could receive all three mandatory courses

- In this example the District has only 260 students requiring instruction. Thus the pool will only be used 50% of the time (533/260) for mandatory programs. This leaves at least 2 periods per day for other courses. On a yearly basis there would be approximately 10 available courses for elective offerings, including the three secondary offerings previously determined.

Knowing what it must set aside for its basic program, the District can now consider alternatives such as additional mandatory requirements, enlarging voluntary offerings, increasing usage to 6 periods per day to gain greatly expanded offerings with the same facility or, although not recommended, reducing the number of periods for which the instruction will be available.

c. Test calculations for an Actual Situation

Example

- Assume each fifth grade class will have the 3 courses given during that year.

  Number of 5th grade students = 30
  Number of sessions required = 30/10 = 3 sessions

  Three periods per day for 3 quarters will be required to instruct 5th grade class. A total of 9 courses out of a possible 20. This leaves 11 courses for instruction of secondary students. In the event the District wished to offer 3 courses of basic swimming for students who have transferred in the district and who have not com-

pleted mandatory course work, this should leave 8 courses available for the instruction of electives. This example, assumes one teacher is available.

2. Determine Size of Pool necessary to accommodate program needs based on the Districts program decisions and the results of the calculations just illustrated.

(Chapter II, Factors in Determining Pool Size, and the chart on Page 8 give the mimimum requirements for basic instructional programs. Also see the Appendix for additional information on pool configurations).

3. Select smallest pool size based on combination evaluated above.

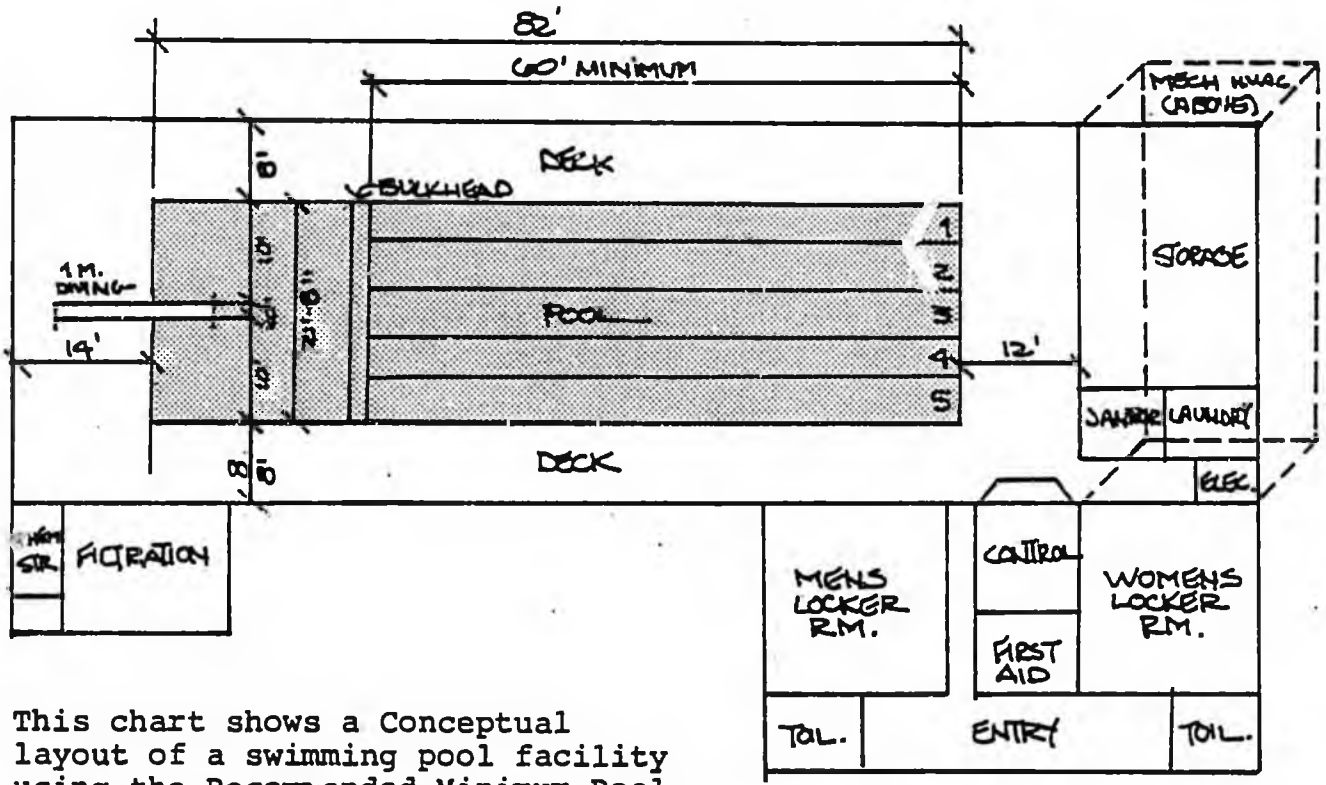
4. If the size developed in (C) is equal to or larger than prescribed maximum dimensions it must be changed to avoid competitive size unless district is prepared to underwrite cost of additional size. Other options include construction of two facilities instead of one. Width may vary to 70' to accommodate required instructional area.

B. CONCEPTUAL SWIMMING FACILITY

No minimum standards are established for the complete swimming facility. However, several factors should be kept in mind.

- Adequate deck space for instruction must be provided. A minimum of twelve feet is recommended for this purpose.
- A minimum of 6 feet of deck space should be allowed on all other sides of the pool for safety and also during recreational use. As many as 2/3 of the group will be out of the water at any one time.
- Equipment, office space, locker and shower rooms must be included and designed with a functional amount of space depending on population served.
- If diving is provided, ceilings hould be at least 16 feet above the highest board surface. A one-meter board and 12 foot depth is the recommended minimum for diving.
- Safety is of primary concern, a secure area for chemical storage should be provided, as well as a control station and first aid area. (For additional Health-Safety information see HEW Publication No. DCD79-8319, Swimming Pools, Safety and Disease Control, 1979)
- Because of safety and health concerns, several agencies have regulatory authority covering a water safety facility. In addition to applicable uniform codes for building, mechanical, electrical, fire safety, etc., Districts must adhere to DOT/PF barrier free regulations and Department of Environmental Conservation health and safety regulations, including those covering swimming pools. (18AAC 30)

Chart 5 Conceptual Layout



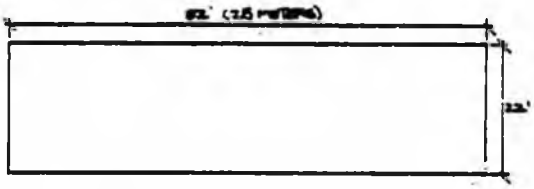
This chart shows a Conceptual layout of a swimming pool facility using the Recommended Minimum Pool (22' x 82'), with a diving instruction Area. For this type of facility a minimum of 8,000 sq. ft. would be recommended.

Pool	1,788
Deck	2,290
Control	120
First Aid	100
Locker Rooms	740
Laundry	70
Janitor	80
Mechanical HVAC @ 7%	560
Filtration	250
Chlorine	30
Chemical Storage	60
Electric	30
Structural - Deck Equipment	340
Toilet	120
Circulation/Entry/Exits	630
Wall - Interior 3%	240
7% Design Factor	560
Total Area	8,008

IV. Appendix

EXAMPLES OF POPULATION SERVED BY CERTAIN POOL SIZES AND CONFIGURATIONS

1. RECOMMENDED MINIMUM POOL.
   22' wide by 82' (25 meters) long



Assumptions

6 class periods per day.
2 groups of 10 per period in pool.
12 courses per semester (six per quarter) = 24 courses per year.
25 hours in-water requires 33 minutes in the pool average per class period assuming 45 class periods per course.

Calculation

20 students per class/120 students per day
x24 courses per year
480 students per year
48 groups per year

Population(s) Served

a. Basic swimming programs only, three required courses.

   (1) 160 students per year could take the 3 mandatory classes. (480 / 3)
   (2) Assuming program is compulsory for secondary students, (grades 7-12) pool would serve 960 students. (6 yrs. available x 160)

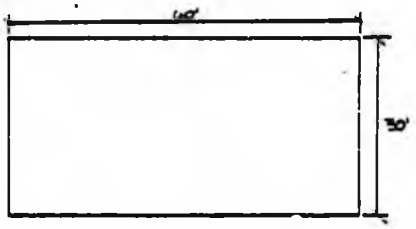
(3) Assuming program is compulsory for elementary and secondary students, pool would serve 1,920 students. (12 yrs. available x 160)

b. Assuming basic swimming group represents 50% of course offerings. This would allow 12 alternative course offerings per year. Then:

(1) For secondary students only, pool would serve a school size of 480 students in mandatory courses.

(2) For elementary and secondary students, pool could serve a school size totalling 960 students in mandatory courses.

2. STANDARD INSTRUCTIONAL POOL
30' wide x 60' long.



Assumptions

6 class periods per day.
2 groups of 10 per period in pool.
2 courses per semester (one per quarter), 24 courses per year.
25 hours in-water requires 33 minutes in the pool average per class period assuming 45 periods per course.

Calculation

20 students per class
x24 courses per year
480 groups per year
48 groups per year

Population(s) Served

a. Basic swimming programs only, three required courses.

(1) 160 students per year could take the 3 mandatory classes. (480 / 3)

(2) Assuming program is compulsory for secondary students, (grades 7-12) pool would serve 960 students. (6 yrs. available x 160)

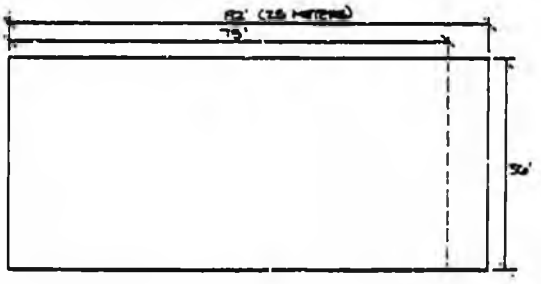
(3) Assuming program is compulsory for elementary and secondary students, pool would serve 1,920 students. (12 yrs. available x 160)

b. Assuming basic swimming group represents 50% of course offerings, this would allow 12 alternative courses per year. Then:

(1) For secondary students only, pool would serve a school size of 480 students in mandatory courses.

(2) For elementary and secondary students, pool could serve a school size totalling 960 students in mandatory courses.

3. SMALLEST COMPETITIVE RECTANGLE 28' x 75' or 82' (25 meters) long. (For competitive swimming lanes are normally 7' or wider)



Assumptions

6 class periods per day
3 groups of 10 per period in pool.
12 courses per semester (one per quarter), 24 courses per year.
25 hours in-water requires 33 minutes in the pool average per class period assuming 45 periods per course.

Calculation

30 students per class
x24 courses per year
720 students per year
72 groups per year

Population(s) Served

a. Basic swimming programs only, three required courses.

(1) 240 students per year could take the 3 mandatory classes. (720/3)

(2) Assuming program is compulsory for secondary students, (7-12) pool would serve 1,440 students. (6 yrs. available x 240)

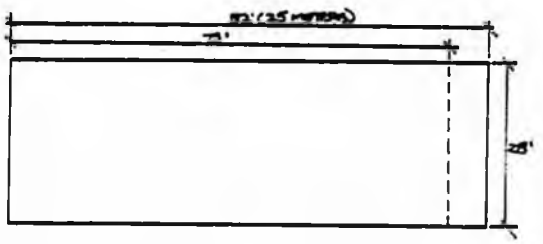
(3) Assuming program is compulsory for elementary and secondary students, pool would serve 2,880 students. (12 yrs. available x 240)

b. Assuming basic swimming group represents 50% of course offerings, 12 alternative courses could be offered per year. Then:

(1) For secondary students only, pool would serve 720 students in mandatory courses.

(2) For elementary and secondary students, pool could serve 1,440 students in mandatory courses.

4. INTERMEDIATE RECTANGLE (Montreal standard) 36' wide by 75' long or 82' (25 meters) long



Assumptions

6	class periods per day.
2	groups of 25 per period in pool.
12	courses per semester, 24 per year
25	hours in water requires 33 minutes in the pool average per class period assuming 45 class periods per course.

Calculation

50	Students per class
x24	Courses per year
1,200	Students per year
48	Groups per year

Population Served

a. Basic swimming programs only, three required courses.

(1) 400 students per year could take the 3 mandatory classes. (1200 / 3)

(2) Assuming program compulsory for secondary students, (7-12) pool would serve 2,400 students. (6 yrs. available x 400)

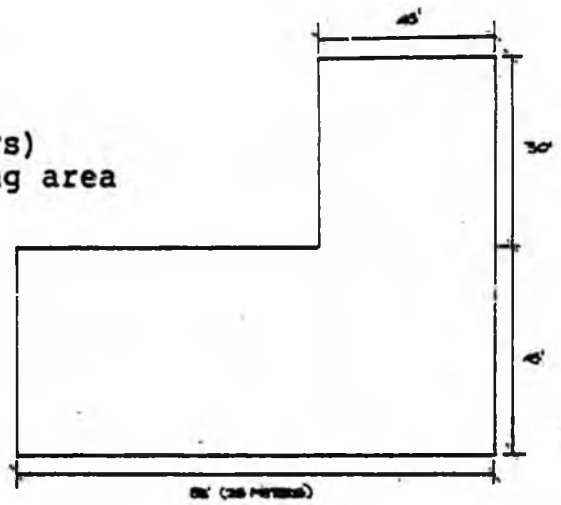
(3) Assuming program is compulsory for elementary and secondary students, pool would serve 4,800 students. (12 yrs. x 400)

b. Assuming basic swimming represents 50% of course offerings, 12 alternative courses could be offered per year. Then:

(1) For secondary students only, pool would serve 1,200 students in mandatory courses.

(2) For elementary and secondary students, pool could serve 2,400 students in mandatory courses.

5. "L" SHAPE POOL
45' by 82' (25 meters)
and 45' by 30' diving area



Assumptions

6 class periods per day.
4 groups of 25 per period in pool.
12 courses per semester (24 per year)
25 hours in-water requires 33 minutes in the pool average per class period assuming 45 class periods per course.

Calculation

100 students per class
x24 courses per year
2,400 students per year
96 groups per year

Population Served

a. Basic swimming only, three required courses.

(1) 800 students per year would be instructed in basic swimming. (2400 / 3)

(2) Assuming program is compulsory for secondary only, (7-12) pool would serve 4,800 secondary students, (6 yrs. available x 800). For example, this could serve two high schools of 1,60[illegible] students and two junior highs of 800 students

(3) Assuming program is compulsory for elementary students (excluding Kindergar-

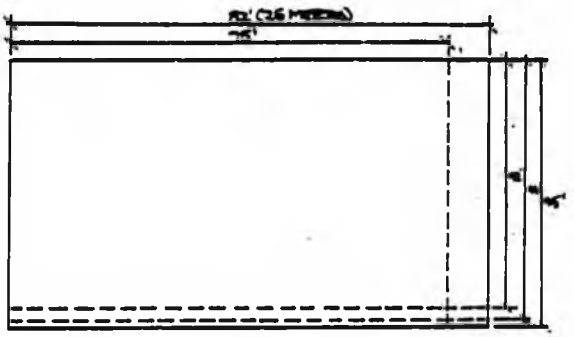
ten), pool would serve total enrollment of 9,600 students. (12 yrs. available x 800) This could be for example, two high schools of 1,600, two junior highs of 800, eight elementary schools of 600.

b. For combination of courses where 50% (12) offerings are basic swimming, and 12 are alternative courses:

(1) Pool would serve 2,400 students in mandatory courses for a secondary program only.

(2) Assuming mandatory program is compulsory for 1-12, pool would handle 4,800 students.

6. RECTANGULAR "COMPETITION" POOL (common misnomer: "Olympic" Pool size) 42', 44' or 45' wide by 75' or 82' (25 meters) long.



Assumptions

6 class periods per day.
3 groups of 25 per period in pool.
12 courses per semester, 24 per year.
25 hours in-water requires 33 minutes in pool, average per class period assuming 45 class periods per course.

Calculation

75 Students per class
x24 Courses per year
1,800 Students per year
72 Groups per year

Population Served

a. Basic instruction only, three required courses.

(1) 600 students per year could take the 3 mandatory classes. (1800 / 3)

(2) Assuming program compulsory for secondary only, (7-12) pool would serve 3,600 secondary students. (6 yrs. available x 600) For example, pool could serve one high school of 1,800, and two junior highs of 900 each.

(3) Assuming program is compulsory for elementary students (excluding Kindergarten) pool would serve total enrollment of 7,200 students. (12 yrs. x 600) For example, two high schools of 1,800, two junior highs of 900, 9 elementary schools of 400.

b. For combination of courses where 50% (12) courses are basic swimming, twelve are alternative courses:

(1) 1800 students would be served in the mandatory program if secondary only.

(2) Assuming the basic program is mandatory for 1-12, pool would serve a population of 3,600 students in those courses.

SB 51

Alaska State Legislature

BETTYE FAHRENKAMP, Chairman
ARLISS STURGULEWSKI, Vice Chairman
JOE JOSEPHSON
PAUL FISCHER
EDNA ARMSTRONG-DE VRIES

POUCH V
STATE CAPITAL
JUNEAU, ALASKA 99811
(907) 465-3834
(907) 465-3835

Senate
Committee on
Health, Education and Social Services

May 11, 1985

Dear Mr. President and Mr. Speaker:

The Conference Committee considering Committee Substitute for Senate Bill No. 51 (Fin) and House Committee Substitute for Committee Substitute for Senate Bill No. 51 (Fin) (state aid for school construction; efd) respectfully requests limited powers of free conference on the following specific point:

page 3, line 12, delete

"or program needs"

Bettye Fahrenkamp
Senator Fahrenkamp, Chairman

Sam Cotten
Representative Cotten, Chairman

Rick Halford
Senator Halford

Ronald I. Larson
Representative Larson

Senator Kerttula

Steve Rieger
Representative Rieger

NRN

APR 8 1985

KENAI PENINSULA BOROUGH

BOX 850 · SOLDOTNA, ALASKA 99669
PHONE 262-4441

STAN THOMPSON
MAYOR

April 3, 1985

Health, Education and Social Services
Senator Bettye Fahrenkamp, Chairman
Pouch V
Juneau, AK 99811

Dear Senator Fahrenkamp,

Enclosed for your information is Kenai Peninsula Borough Resolution #85-52. This resolution was adopted at the Kenai Peninsula Borough regular assembly meeting on April 2, 1985, and sent to you as per the request of the administration and assembly.

Thank you for your time and concern.

Very truly yours,

Joanne Brindley

Joanne Brindley,
Borough Clerk

Introduced by: Legislative Affairs Committee
Date: April 2, 1985
Vote: Unanimous
Action: Adopted

KENAI PENINSULA BOROUGH

RESOLUTION 85-52

IN SUPPORT OF SENATE BILL 51 AND HOUSE BILL 191 PROVIDING FOR NINETY PERCENT SCHOOL CONSTRUCTION FUNDING.

WHEREAS, the ever increasing population of the Kenai Peninsula Borough has necessitated continual large construction expenditures to provide necessary school facilities; and

WHEREAS, the State of Alaska has provided a large percentage of funding necessary for construction of such school facilities in the past; and

WHEREAS, SB 51 and HB 191, which are currently being considered by the State Senate and House of Representatives, would provide for 90% State funding of municipal costs in school construction, which funding the assembly strongly supports;

NOW THEREFORE, BE IT RESOLVED BY THE ASSEMBLY OF THE KENAI PENINSULA BOROUGH:

Section 1. That the assembly hereby expresses its support for SB 51 and HB 191 and their provision for 90% State funding of school construction.

Section 2. That the clerk is directed to forward copies of this resolution to Governor William Sheffield, the Health, Education & Social Services Committee and the Finance Committee of the Senate and the House of Representatives, Senate President Don Bennett, Speaker of the House Ben Grussendorf, to Senators Paul Fisher, Jalmar Kerttula, Edna DeVries and John Sackett, and to Representatives Mike Navarre, Andre Marrou, Bette Cato, Mike Szymanski and Kay Wallis.

ADOPTED BY THE ASSEMBLY OF THE KENAI PENINSULA BOROUGH ON THIS 2nd DAY OF April, 1985.

Marilyn Dimmick

Marilyn Dimmick, Assembly President

ATTEST:

Joanne S. Bradley

Borough Clerk

PERFORMING & COMMUNICATIONS ARTS IN THE SCHOOLS

SUGGESTIONS FOR THE FORMULATION OF EDUCATIONAL GOALS AND FUNCTIONAL SPACE DESIGN

STATE OF ALASKA DEPARTMENT OF EDUCATION
1984

TABLE OF CONTENTS

PREFACE

The Programming Guideline is intended for use by educators, citizens committees, instructors, architects, arts agencies and specialists in planning school performing and communication arts spaces. The need for a Guideline was identified by the Alaska Cultural Facilities Development Committee. It is under their sponsorship that the Guideline has been prepared. During the course of its preparation, a number of educational and arts agencies have reinforced the need for such a document. These same agencies have indicated their willingness to recommend its use.

The Guideline is intended for use during that portion of the pre-design and design process devoted to formulating goal, space and system concepts for the performing/communication arts. Broadly defined, these instructional and cultural activities include school, community, and guest activities relating to: Music, Drama, Dance; Speech; Media; and Language Arts. The Guideline has application to a variety of spaces whose primary or secondary function is the development of skills, cultural enrichment, and community service. These spaces may include: Theatres and Auditoriums; Lecture Halls and Large Group Instruction Rooms; Gymnasiums and Recreation Halls; Student Commons and Cafeterias; Multipurpose and Media Rooms; Libraries and Music Practice Rooms. The Guideline applies to new, remodeled or found space planning.

INTRODUCTION

Alaskan educators, citizen committees, and art agencies face important performing arts planning questions each time a new school is proposed. Alaskan school and curriculum design is closely linked to citizen response to educational goals. In the case of performing arts it is particularly important that educational goals be identified early in the pre-design process. Without Citizen Committee support and understanding, the performing/communication arts are likely to be designated low priority and not be funded. Therefore, the identification of goals should be the outcome of a structured process involving citizens, educators, resource persons, and performing arts specialists. Curriculum and space planning for music, drama, dance, speech, dramatic literature and media are an integral part of the pre-design process.

This Guideline should be used as a working tool in formulating educational goals and facility concepts. Its focus is school arts programs and spaces; it particularly addresses the needs of small communities. The principles described may be applied to schools serving grades one through twelve, but have particular application to programs serving grades eight through twelve. Since the Guideline deals specifically with Alaskan Communities, it usually assumes community-wide use of spaces. In fact, in most Alaskan communities it is counterproductive to separate school from community needs and resources for the performing/communication arts. Issues relating to community use of the school should be explored during the pre-planning and programming stages.

The specific aims of the Guide are:

- To assist citizens, educators, arts agencies, design team members in the formulation of a rationale for performing/communication arts spaces.
- To recommend an information-gathering process leading to clear concepts for functions and spaces.
- To provide general resource information, checklists, and concept drawings to guide the decision process.

The Guideline is not intended to substitute for an interactive process by which the entire pre-design and design team melds local conditions, educational goals, and good planning practice. It should be used to stimulate rather than constrict the information-gathering and decision-making process. Implementation of the Guideline assumes a complete design team, including owner,

user, architect, as well as performance facilities and acoustics consultants. It is recommended that these special consultants be used as resource persons during the pre-design phase in order to clarify educational goals and concepts. Many failures in performing arts facilities can be traced directly to insufficient specialized input at the early stages of planning. It is further recommended that special consultants be retained by the architect during subsequent design phases.

The Programming Guideline is divided into three broad topics:

1. Goal Concepts
2. Space Concepts
3. System Concepts

Each major topic includes checklists of critical issues for which decisions must be made in order to avoid concept and technical errors. All issues noted should be dealt with during early planning and again during each subsequent architectural planning phase. Characteristically, responses to each checklist item become more comprehensive as planning proceeds. At each planning phase, a re-evaluation and information supplement should be prepared for checklist items. Information then accumulates which is commensurate with a particular planning phase. This procedure also allows each topic to be fully defined in terms of goals, architecture, technical provisions and budget. Also, in this way it is possible to limit the degree of technical detail for each checklist item so concepts are not lost in an excess of premature technical data. Using the Program Guideline in this fashion, it is possible to creatively meld the programming and design of performing/communication arts spaces with the total school design. This last item is particularly important for Alaska since many small communities will select school design concepts built around a group of interdiscipline multipurpose rooms.

A brief example of the checklist approach is illustrated below. The item being considered is an orchestra pit and its impact on the issues noted below.

Pre-Design and Goal Phase

- Discuss the role of music education and student performance activities.
- Discuss the use of the school theatre by local and guest performers.
- Discuss the school as civic center for the community and region.
- Discuss the importance of converting a space for multi-event scheduling.

Schematic and Design Development Phase

- Evaluate various technical alternatives to orchestra pit.
- Evaluate structural, architectural, electrical provisions.
- Estimate direct and related costs and service requirements.
- Evaluate acoustic requirements and size.

Working Drawings and Contract Document Phase

- Detail final provisions and safety devices.
- Detail final budget projections.

In the example shown, the checklist item is analyzed from the point of view of educational goals, community needs, planning and budget impact. Implicit in the approach is the necessity for a full design team response. Some checklist items may be eliminated after cursory examination. The disposition of others may hinge on several stages of evaluation. In short, an "over-designed" checklist is preferable to an over or under-designed building.

Considering the wide range of program and design solutions for performing/communication arts spaces and their particular application to Alaska schools and communities, the existence of a definitive checklist is unlikely. The Program Guideline checklists are thorough and if properly managed will trigger additional items for consideration. The underlying logic of the checklist approach assumes: there is no substitute for a

disciplined fact finding process; there is no substitute for open forum participation of educators, citizens, user groups, and program and design professionals; and the best single method to assure creative program space solutions is early and continuing clarification of goals, concepts, and alternative solutions.

GOAL CONCEPTS

Goal concepts may be divided into four broad discussion categories:

- What is the value of the activity?
- How will the activity serve in the development of the student?
- How will the activity benefit the community?
- How will the activity build on existing resources?

Typically, the issues suggested by these categories are a point of earliest focus in the pre-design and design process. Planning information and decisions for these issues are central to subsequent design phases. Answers to these issues are central to subsequent design phases. Answers to these questions provide positive rationale for a community considering spaces for school music, drama, dance, speech, media and language arts programs.

As discussion on issues occurs, it is important to record as much salient information as possible. Issues which provoke significant controversy should be deferred for future consideration. It is best to investigate controversial issues from the point of view of Space and Systems, as well as goals prior to rendering a final judgment.

EXAMPLE: A member of a citizen school committee may fear any discussion of the performing/communication arts implies a traditional theatre; the inclusion of such a space is thought to be a "luxury" in their school. If this point of controversy is recorded and held until alternate space solutions are reviewed, the controversy may be easily resolved.

There are three classic snares that often entangle the goal formulation process: One, a lack of expert resource information to guide discussion; Two, ill-informed advocacy leading to arbitrary judgments; Three, failure to ask the right questions, leading to missed opportunities.

Arts/Arts in Education

"The Board is committed to the development and expansion of courses of study which utilize the arts as modes of communication and self-expression. The education of students is not complete without the development of those dimensions of human behavior that are best expressed through the arts."

Adopted 10/9/80
Alaska State Board of Education Policies

In the last five years, various Alaskan education and arts agencies have developed extensive educational goal statements.* These documents are valuable resources for early planning. The discussion issues listed below are derived both from these documents and from values traditionally associated with the performing/communication arts. Addressing these issues in pre-architectural and architectural planning sessions will help equate broad educational aims with the performing/communication arts. Similarly, such investigation will sample the degree and nature of a community's commitment to these disciplines.

A. Potential of the Performing/Communication Arts for:

- Preserving ethnic tradition and intercultural awareness.
- Directing use of leisure time.
- Stimulating creative abilities and independent use of knowledge.
- Encouraging creative teaching.
- Developing aesthetic and humanistic perceptions.
- Demonstrating achievements in art, music, drama, literature, media.
- Serving gifted and disadvantaged students.

B. Potential of the Performing/communication Arts for:

- Teaching the citizenship skills of living in a democracy.
- Developing self realization through self expression.
- Mastering basic skills: music, drama, dance, speech, media.
- Introducing career choices and avocations.
- Developing motor and cognitive skills.

*Alaska Arts in Education Handbook, 1981
Alaska Arts in Education Plan, 1981-85
Alaska Small High School Planning Study Program and Space Guidelines
Alaska Small High School Program and Educational Specifications
Something Special, 1981
Effective Schooling Governors Task Force, 1981
Alaska State Board of Education Policies, 1980

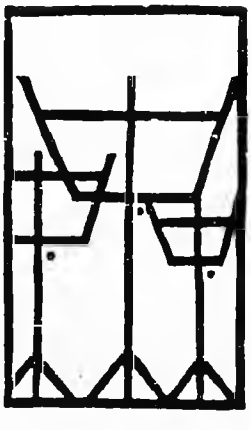
CATEGORY TWO - USE PHILOSOPHY GOALS

Issues in this category deal primarily with expectations and attitudes relating to the types of spaces, the flexibility of spaces, and their accessibility.

- Is the school's concept primarily a "universal" or an "articulated" space design? See Alaska Small High School Planning Study.
- Is the goal to design spaces each of which is to be used for a wide range of academic, recreation, and arts activities?
    - How are multi-function spaces to serve performance, rehearsal, teaching requirements?
    - Will the school use existing community space resources for scheduling curricular and co-curricular activities?
    - Will special event and community activities be encouraged to use school facilities?
- Will the school be used for non-degree and continuing adult education?
- Will the school encourage special event scheduling associated with community quality of life and student cultural programs?
    - Are there or are there likely to be specific school/community performing groups which will use school spaces as a production and performance home base?
    - How are performing/communication arts activities to be funded or subsidized (state, arts agencies, local)?
    - Will the school employ a specialist for space and event management?
    - Will the school encourage maximum space utilization--"Lighted Schoolhouse"?

CATEGORY THREE - ACTIVITY GOALS

Issues in this category deal primarily with expectations and attitudes relating to the types of activities.



It is essential at this state of goal formulation to discuss typical performing arts activities. Detailed information relating to group size, schedule, funding, growth, and priority should be recorded.

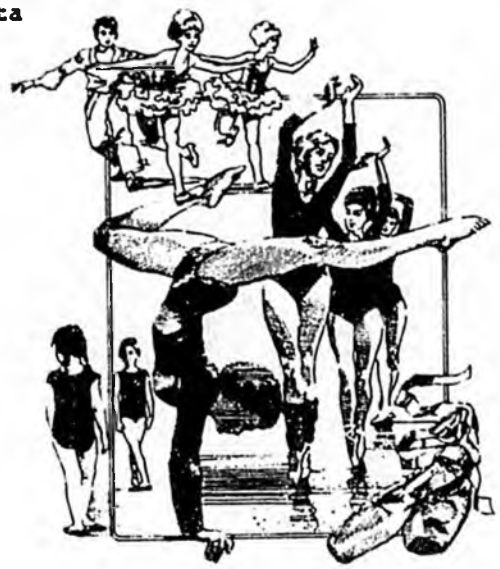
- MUSIC

    Music Appreciation
    Vocal Instruction
    Instrumental Instruction
    Choral

Symphonic
Band
Joint Choral/Instrumental
Master Classes and Mini Courses
Seminars and Workshops
Artist in Residence
Festivals and Contests
Tourist Events
Other

- **THEATRE**

Theatre Appreciation
Skills Course; Acting; Directing; Stage Crafts
Drama
Lyric Theatre: Musicals, Operetta
Childrens Theatre
Creative Dramatics
Mime
Puppet Theatre
Master Classes and Mini Courses
Seminars and Workshops
Artist in Residence
Festivals and Contests
Tourist Events
Other



- **DANCE**

Dance Appreciation
Individual and Group Instruction
Dance Performance
Master Classes and Mini Courses
Seminars and Workshops
Artist in Residence
Festivals and Contests
Tourist Events
Other

- **SPEECH/MEDIA/LANGUAGE ARTS**

Skills Courses: Public Speaking; Debate; Small Group Discussions
School Assemblies and Contests
Large Group Instruction
Film, Slide, Television Presentations
Multi-media Presentations
Public Forum and Meetings
Skills courses: Film; Photography; Radio; Television
State Educational Television Series

CATEGORY FOUR - RESOURCE GOALS

Issues in this category deal primarily with the best possible use of available state and local resources for implementing program and space concepts.

- Several state agencies have current publications that detail state programs and services. The design team has the responsibility of requesting current publications which indicate funding for new and on-going programs. Agencies to be contacted include: Alaska Alliance for Arts Education; Alaska State Council on the Arts; South East Regional Resource Center; Cultural Facilities Development Committee.

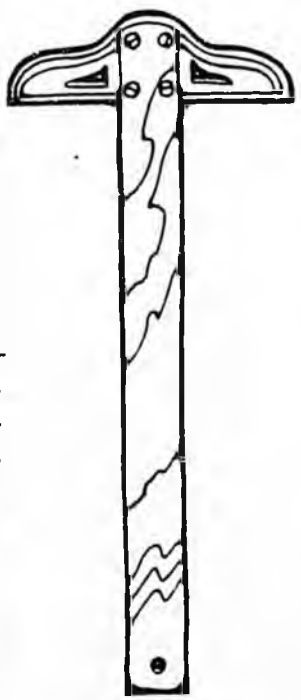
- Locally available spaces should be surveyed for their potential use as performing/communication arts spaces. Included are: existing schools; churches; town hall; museum; cinema; other clear span spaces.

- Locally an inventory of available teaching and resource people who may assist with music, drama, dance, speech, media, language arts should be made.

SPACE CONCEPTS

The investigation of goal concepts outlined above seeks positive links between a community's expectations for a new or renovated school and the potential of the performing/communication arts to realize those aims. As stated, the bridge between expectation and spaces might be interpreted in terms of educational aims and acquired skills, or use philosophy and activities, or creative use of local or state resources. Often this bridge is perceived in terms of economic benefits and civic pride. It certainly is possible to enrich the economy of a community by constructing cultural enrichment facilities. It is not uncommon for these same cultural facilities to become symbolic of a community's achievement. Several cities in Alaska are currently experiencing the economic benefits of recently completed public assembly spaces. The construction of public assembly spaces may be incorporated into school projects.

When school arts training and public spaces are seen in terms of their broadest possible impact on the total community, benefits are diverse and far reaching. One method for maximizing impact is clearly defined goal concepts. A second method is the creative matching of spaces to goal concepts. Within a given community there are many options for accommodating a broad range of music, drama, dance, speech, media and language arts appreciation, skills, and performance activities. Well formulated goal concepts help provide a basis for selecting spaces. Similarly, a survey of available space resources may identify spaces which could be adopted to meet the goal concepts.



This section of the Guideline is a tool for assisting the community and design team to evaluate space concepts. To this end, the Guideline: (1) Brackets a range of space options, by describing three significantly different architectural solutions for school arts training and public assembly spaces; (2) Provides a checklist of support spaces. The final selection of performing/communications arts spaces should remain an open process until such time that the owner/user/design team finds a match for goal concepts, total school design, community impact and budget. During the evaluation process, the team may be guided by the general observations noted below.

1. Good working models do exist for each of the three prototypical concepts described. Field trips can be very useful for clarifying space types and functions.

2. Multi use or shared space solutions for the performing/communication arts are practical when goal concepts or budget dictate their use. It is practical, given careful design, to execute flexible spaces which have good accommodations for academic, recreation, and performing arts activities.

3. The size of a community should not be the single determining factor for selection of a performing space. Use projections and longterm educational and cultural impact are much more important.

4. The prototype schemes should be thought of as "themes" to be varied based on individual project requirements and the creative interpretation of the design team.

5. No one scheme is inherently preferred; each has its advantages and disadvantages as it is applied to a particular situation. Each space type may be well or poorly executed.

6. There is no "cheap" solution to providing spaces for the performing/communication arts. Community commitment at the goal concept stage must be backed by funding commitment.

7. School and community arts activities typically experience significant growth when good spaces are provided; "Theatres" can be a common ground for school and community.

What follows is a brief description of three alternative space concepts. The full design team should weigh the advantages of each scheme. Each prototype is described in terms of its principal physical and functional features and is represented by plan and section concept drawings. The term "theatre" is used in the general sense of a performing public assembly space. In this context there are many possible theatre/architectural forms and the theatre space may be used for many purposes. Only major space, system, and function features are listed. The design team must evaluate each form in detail for best matching of program and spaces. In some instances, accommodations for public assembly, performing arts education and cultural enrichment activities will have to be designed into spaces where primary function is not arts related.

CONCEPT ONE - MULTIFORM THEATRE

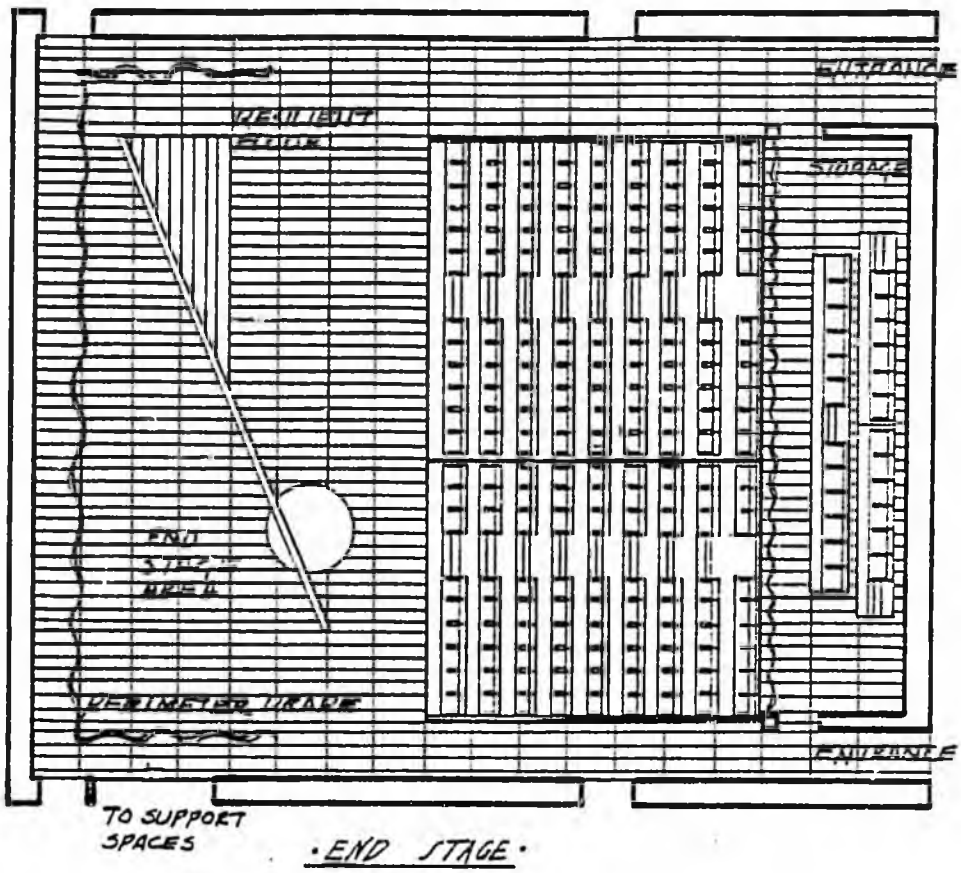
(See Drawings 1, 2, 3)

Multiform or "Black Box" theatres are highly adaptable spaces which may serve a wide range of academic, recreation and arts functions. As distinguished from more traditional theatre forms, seats are not fixed and the performance area may be set up at several different locations. Flat floor activities are possible with all seats in storage.

Major Physical and System Features (Applies to school, community, guest use)

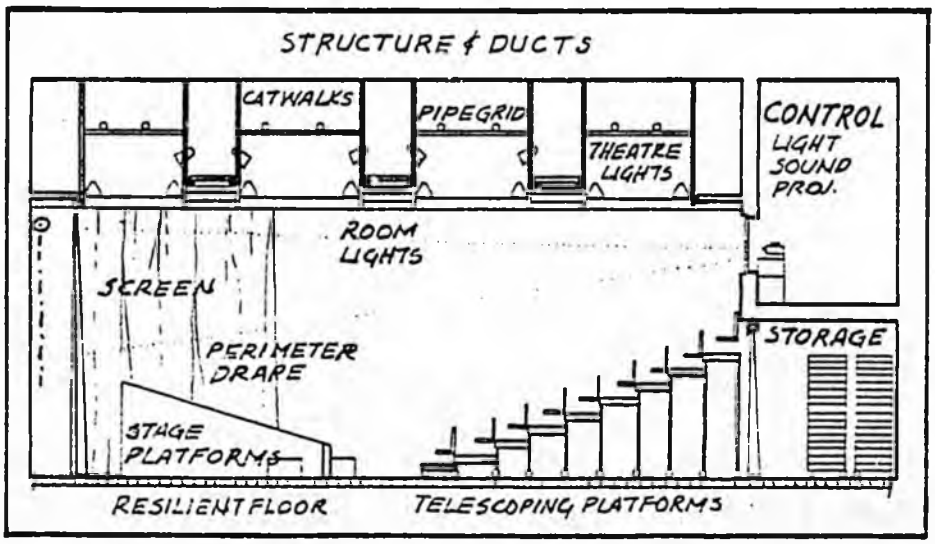
- Flexible seating in the 100 to 300 range, pending size of architectural envelop; typical 60'x70'x30' for approximately 200 seats; seating capacity larger than 350 is problematic.
- Telescoping platforms which are portable and store in seat storage area; chairs are integral and upholstered. End stage, arena, thrust seating arrangements are possible or entire flat floor area may be cleared.
- Seat storage open to room.
- Resilient wood "stage" floor throughout space.
- Control Booth over seat storage.
- Actor/Audience circulation on a minimum of three sides (circulation corridor outside of space).
- Overhead Support System of catwalks and pipe grid for: scenery, curtains, tracks; audience and general illumination; theatrical lighting.
- Light, Sound, Projection Control Booth.
- Vertical access to catwalks and Control Booth.
- Direct access to support spaces - See Support Space Checklist.
- Acoustic Provisions: Sound/light lock vestibules; sound isolating construction and special doors; mechanical system noise control (NC 15-20); reverberation, echo, flutter control.
- Lighting: General illumination; task lighting (Control Booth); worklight; dim audience light; theatrical lighting control and distribution.
- Sound: Recording/playback; effects; theatre communication (production communication and monitor page); speech and music reinforcement.
- Television: Tie lines; teleproduction; television projection.
- Projections: 16 mm film; 35 mm slides; super 8 mm; screens.
- Other: Dance bar and mirror; touring show provisions (power and distribution for light and sound).

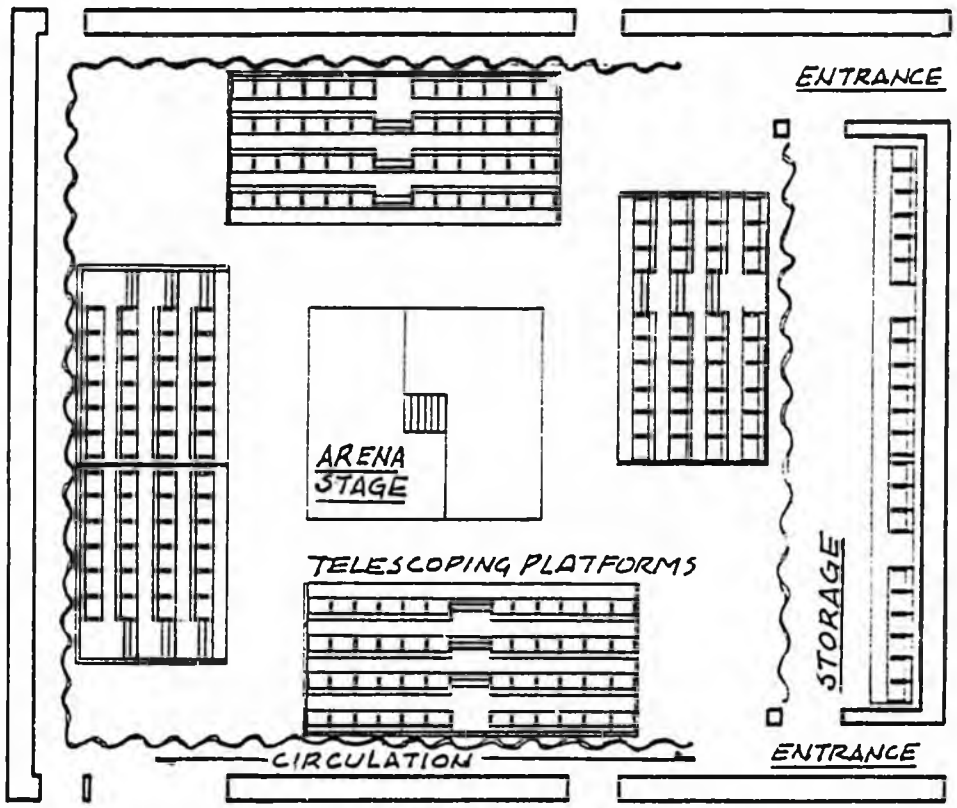
·PLAN·



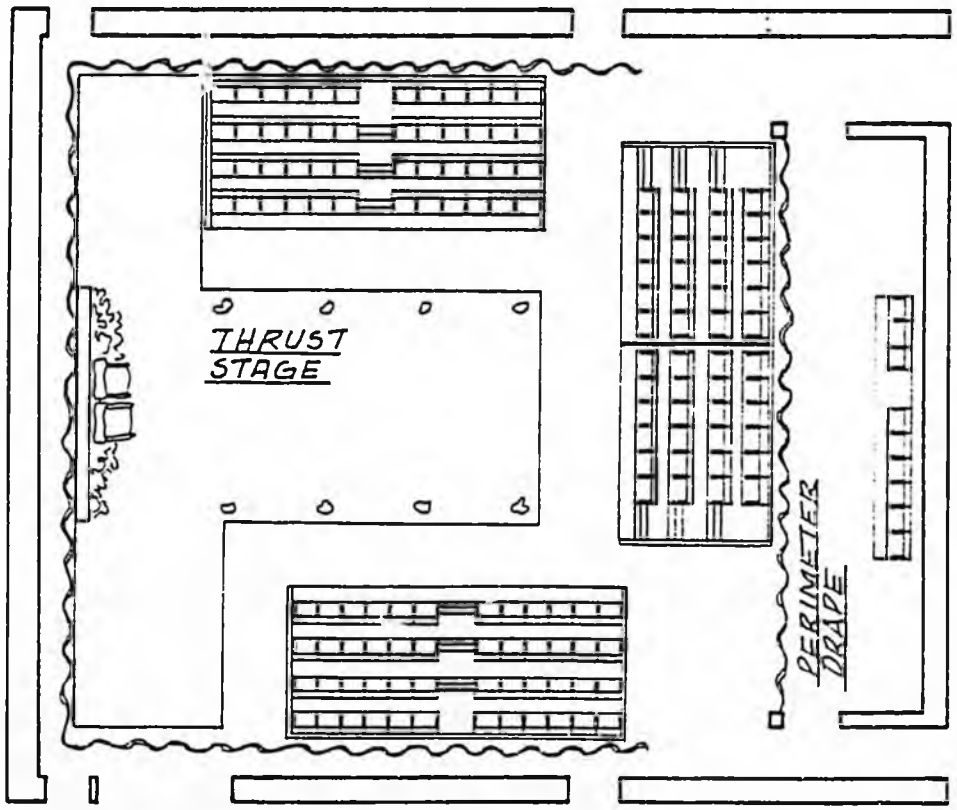
·END STAGE·

·SECTION·



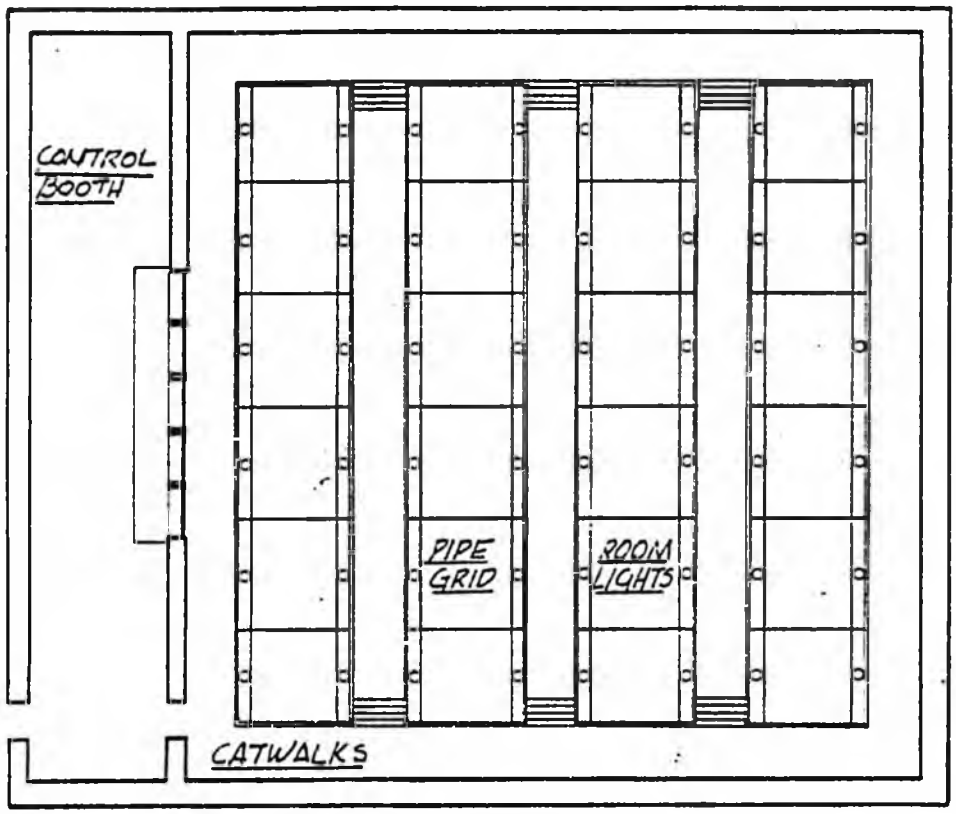


•CENTRAL STAGE•

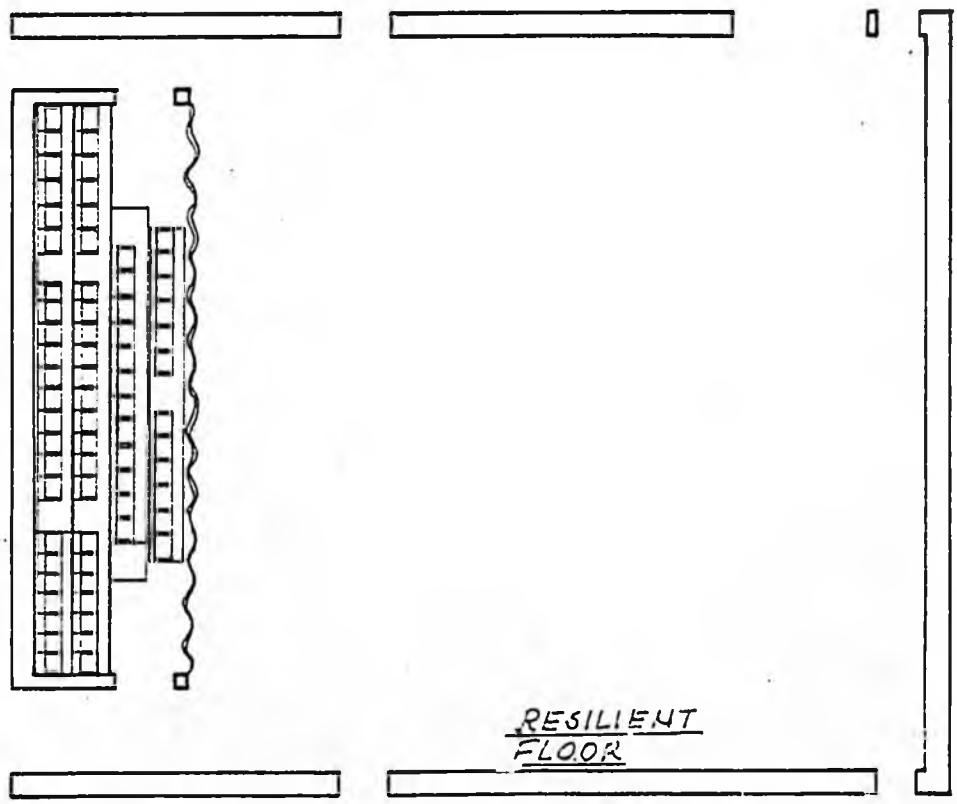


•THRUST STAGE•

MULTIFORM STAGE



• CATWALK / CONTROL •



• FLOOR PLAN / SEAT STORAGE •

Major Functional Capabilities (Applies to school, community, guest use)

- Music: Choral and instrumental and small group instruction and rehearsal; solo and small group performance. Very limited capability for large ensemble presentation; orchestra pit is problematic but possible. Limited festival and touring use.

- Theatre: Classroom for theatre skills courses; rehearsal; small scale production with variable seating configurations; lyric theatre (musicals, operetta) limited; orchestra pit is problematic but possible. Very limited for large scale production using scenery and scene shifting. Childrens theatre, mime, puppets, creative dramatics. Limited festival and touring show use.

- Dance: Classroom for dance skills and rehearsal; small scale contemporary, ethnic, jazz dance forms; very limited for classical ballet presentation, orchestra pit problematic. Limited touring show use.

- Speech/Language Arts: Classroom and public assembly for speakers, meetings, panel discussion, demonstrations.

- Media: Film, slide, television presentations; adaptable to film and television teaching and video tape.

- Other School/Community Use: Art exhibits; small craft shows; social dances and receptions; inservice programs; general classroom; interdiscipline projects. Workshops, seminars, master classes all disciplines.

- Scheduling: Nominal set up time for small groups, classes, and informal activities; approximately one to two hours to shift all seats into play position.

- Aesthetics: Biggest design challenge is providing sense of civic theatre for major events. Limits scale of music, dance, theatre presentations staged locally or by touring companies.

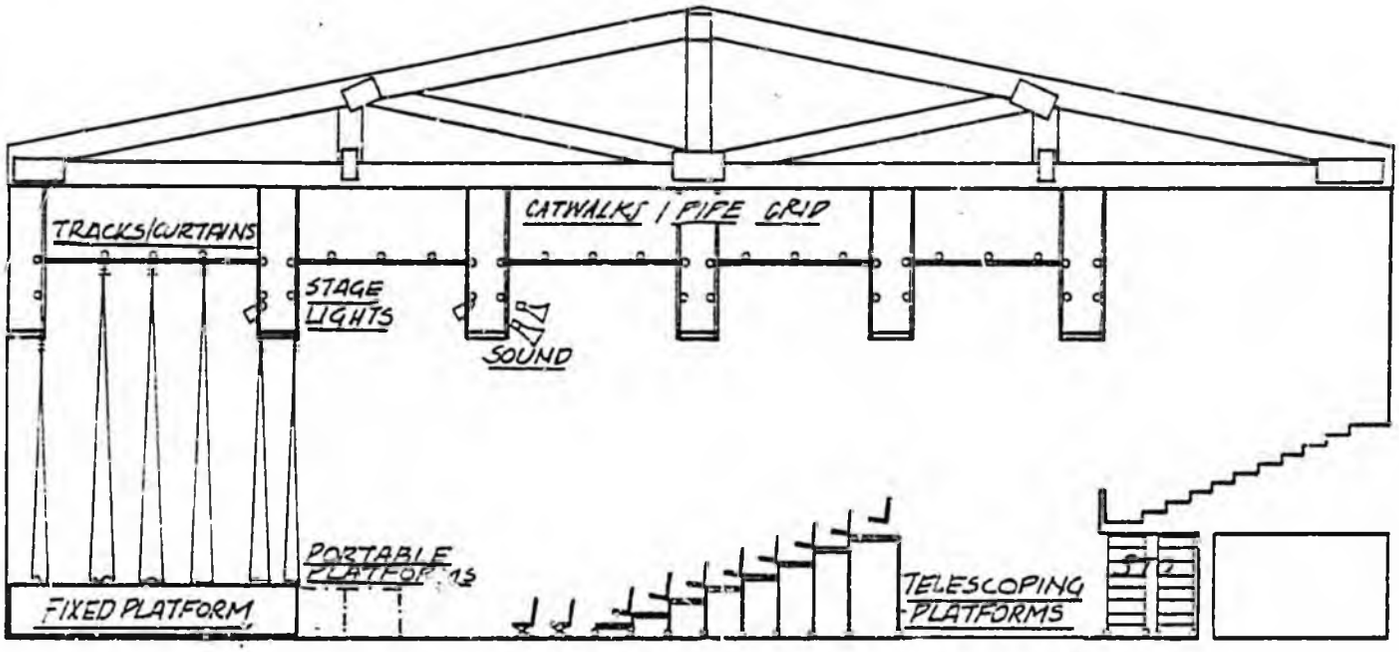
CONCEPT TWO - GYMNASIUM THEATRE

(See Drawing #4)

This concept is based on expanding the capability of a space whose primary function is recreation and athletics. This solution borrows heavily from the Multiform Concept suggesting the fixed portion of the stage platform may be at the end or side of the playing court. Though gymnasiums may be converted into performing spaces, access to these spaces for public events, set up, and rehearsal is generally very limited due to intense scheduling for recreation and athletic events. Selection of this concept typically is an interim solution for the performing arts.

Major Physical and System Features (Applies to school, community, guest use)

- Raised permanent platform stage beyond playing court. Platform stage used for athletic and recreational activities when not in use as stage. Athletic event bleachers may be used on platform, and stored at back wall of stage.
- Flexible seating in the 200 to 300 range plus bleachers; capacity is adjusted to community and gymnasium size.
- Telescoping platforms which are portable and store in seat storage area; chairs are integral and upholstered.
- Portable platforms for various seating arrangements may be used. It is not recommended that portable platforms be the only method for stage events; see permanent stage above. Portable platforms may be used as permanent stage extension.
- Resilient wood permanent stage floor.
- Control Booth may be enclosed space above bleachers or portable equipment; enclosed space preferred.
- Actor circulation from platform to support spaces by way of corridor or masking curtains.
- Overhead Support System: catwalks and pipe grid for: scenery, curtains, tracks, audience and general illumination; theatrical lighting; sports lighting; sound.
- Vertical access to catwalks and Control Booth.
- Acoustic Provisions: sound/light lock vestibules; sound isolating constructions and special doors; mechanical system noise control (NC 15-20); reverberation; echo; flutter control. Portable orchestra shell and overhead reflecting panels.
- Lighting: general illumination; task lighting (Control Booth); work light; dim audience lights; theatrical lighting control and distribution; sports/recreation lighting.
- Sound: Recording/playback; effects; speech and music reinforcement, theatre communication (production communication and monitor page).
- Tracks and Curtains: masking and scenery.
- Television: tie lines, camera locations, power, cable pathway.
- Projection: pending Control Booth.
- Other: Dance bar and mirror at permanent stage; touring show provisions (power and distribution for light and sound).



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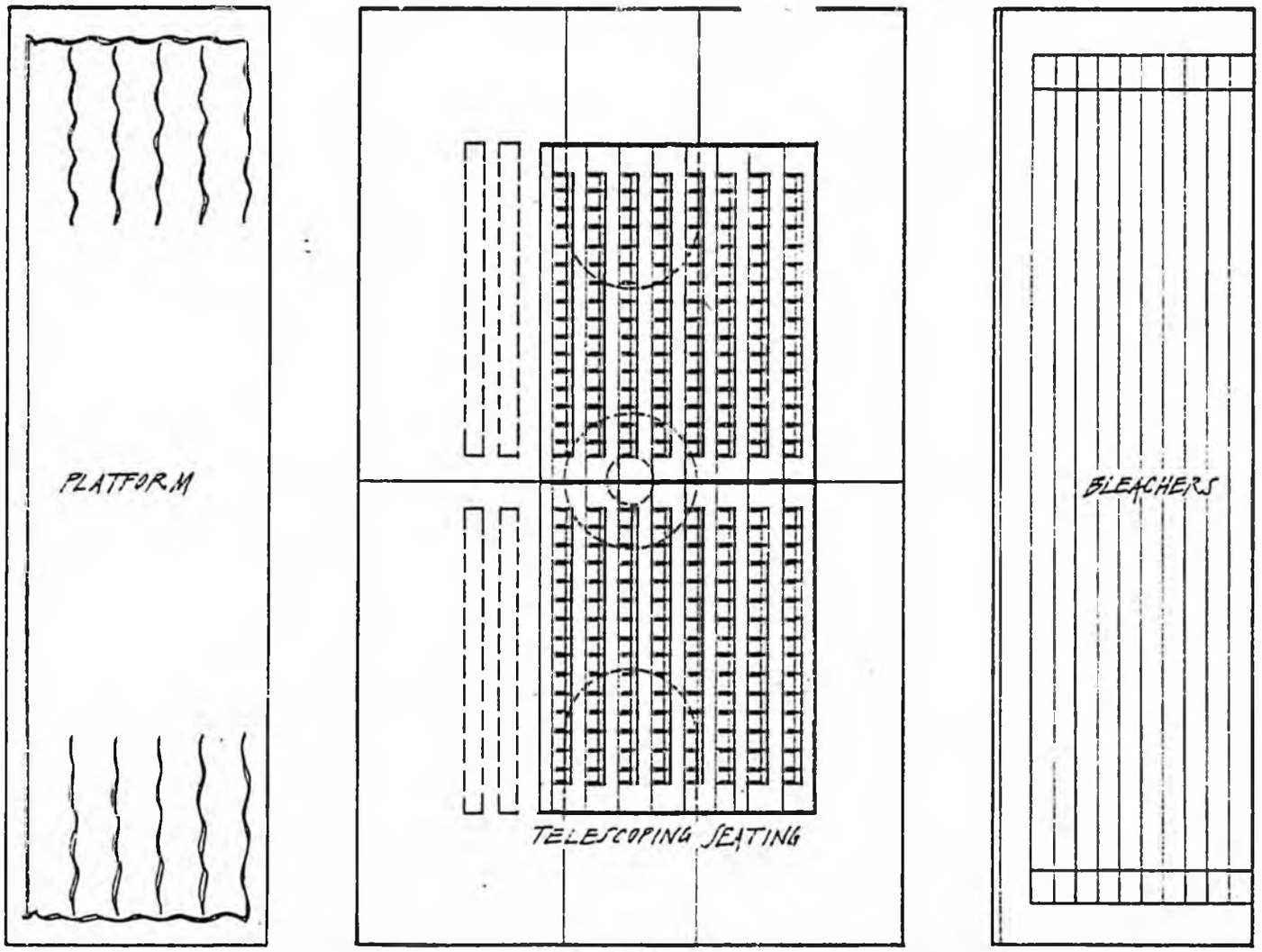


•PLAN•

GYMNASIUM / THEATRE

Major Functional Capabilities (Applies to school, community, guest use)

NOTE: Multipurpose, shared use of the gymnasium may be severely limited for performing/communication arts activities due to gymnasium's use as an athletic and recreation space. Though activities noted below are technically manageable in a gymnasium with a fixed platform, these activities may be significantly reduced in scope and quality due to scale and accessibility of space.

- Music: Choral and instrumental and small group instruction and rehearsal; greater large ensemble presentation potential than multiform Theatre. Orchestra pit not practical. Limited festival and touring use.
- Theatre: Limited classroom use for skills and rehearsal. Small scale production. Orchestra pit not practical. Very limited use for children's theatre, mime, puppets, creative dramatics. Limited festival and touring show use.
- Dance: Classroom for dance skills and rehearsal; small scale contemporary, ethnic, jazz dance presentations. Very limited for classical ballet presentation. Orchestra pit not practical. Limited touring show and festival use.
- Speech/Language Arts: Public forms, meetings. Very limited for all other small group and instructional activities.
- Media: Film, slide, television presentations; adaptable to film and television teaching and video tape.
- Other School/Community Use: Art exhibits, craft shows; social dances; receptions; in-service programs; general classroom; limited use for interdiscipline projects, workshops, seminars, and master classic disciplines.
- Scheduling: See note above regarding accessibility; long set up and turn overtime; activity conflict.
- Aesthetic: Scale and design of gymnasium are not generally supportive of performing/communication arts. This solution does measurably limit the range of arts activities.

Note: Though a Gymnasium Theatre solution is likely to be the least desirable concept, it may be the only available solution in some communities. Should this be the case, then it is recommended that the provisions noted above be implemented. These provisions will be cost effective and will contribute to the education of students and the cultural enrichment of the community.

CONCEPT THREE - PROSCENIUM AND END STAGE THEATRE

(See Drawings 5, 6, 7)

Represented in Drawings #5, 6, 7.

Note: The essential difference between the proscenium (#5 and #6) and end stage theatre(#7) shown is the deletion of the fly loft. All other provisions are similar. There are many variations of Proscenium Theatre. The concept shown is a "hybrid" variant which utilizes side decks, vomitories, and a partial thrust (lift plus apron) in addition to the traditional Proscenium Theatre elements. More "conventional" Proscenium Theatres are also appropriate as school theatre space concepts. Variants are used to expand the flexibility of this fixed seat form. As a rule, other fixed seat forms such as the arena and thrust are not used in school theatres due to their limitations for multi-event scheduling.

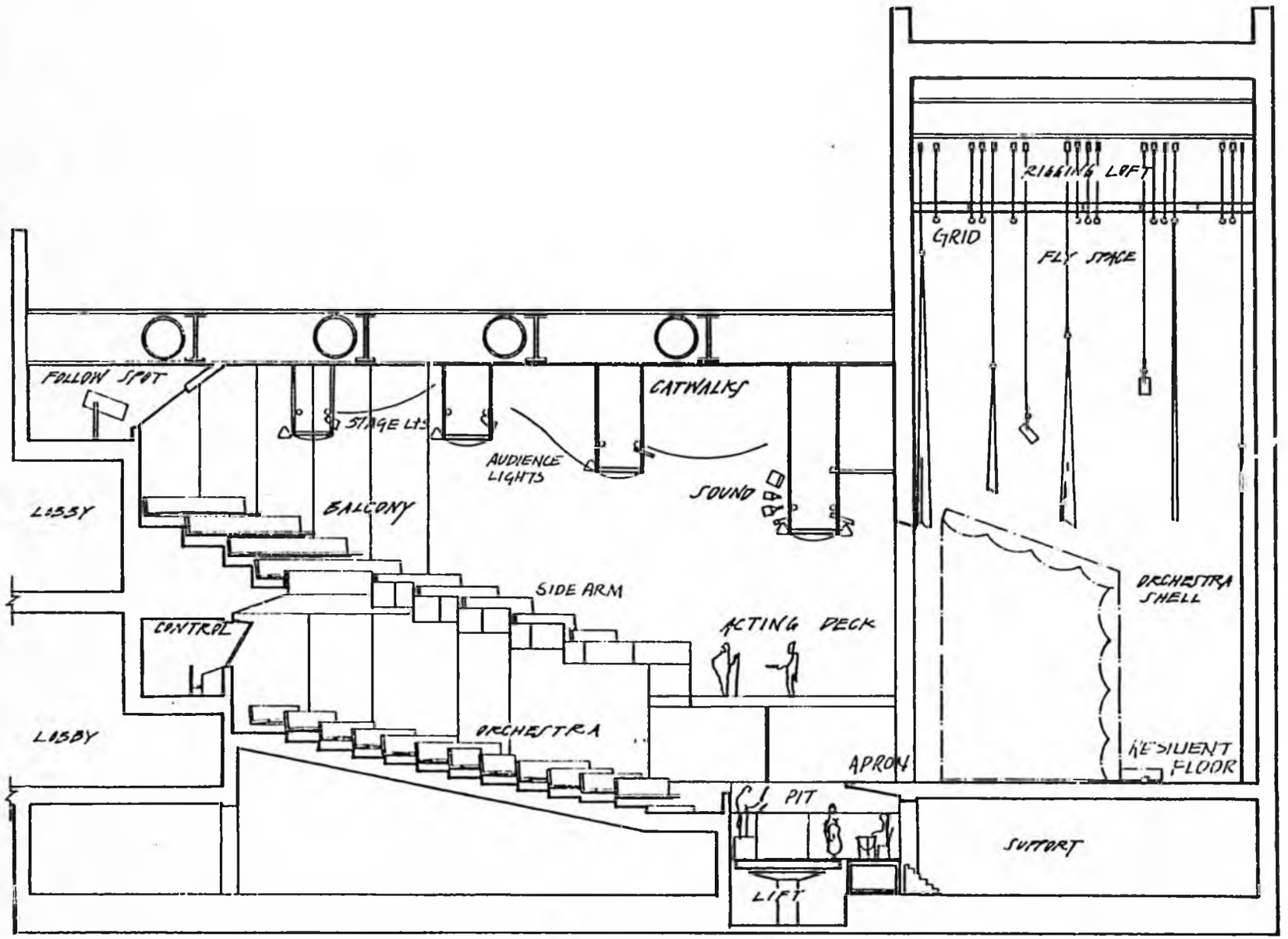
Major Physical and System Features (applies to school, community, guest use)

- Fixed seating with seats on axis to the stage. Capacity is dictated by program. However, "cost effectiveness" of this form is questionable under three hundred seats. Seating may be continental (shown) or conventional pending program, code, building layout. Seating should be stepped for best sightlines.
- Seating may be on two levels (orchestra and balcony shown); two levels are generally preferred for variable seating capacity and room acoustics.
- Light, Sound, Projection Control Booth located at rear of orchestra seating.
- Follow Spotlight Deck or Booth along Control Booth or rear of upper level.
- Catwalks over audience for audience light, sound system, theatrical lighting, support of sound reflecting panels.
- Acoustic Provisions: Sound light lock vestibules; sound isolation constructions and special doors; Mechanical system noise control (NC 15-20); Reverberation, echo, flutter control; orchestra shell; sound absorbing draperies.
- Orchestra Pit: Automated or Manual.
- Apron.
- Side light slots.
- Vertical access to catwalks, booths, side light slots, pit.
- Stage provisions (Proscenium); resilient wood floor; wings; shell storage; fly spaces; grid; loft; galleries.

- Stage provisions (End Stage): resilient wood floor; wings; shell storage; pipe grid and catwalks.
- Lighting: general illumination; task lighting; work light; dim audience light; theatrical lighting control and distribution.
- Rigging, Curtains, Tracks (Proscenium): manual counterweight rigging for flying curtains, tracks, lights, scenery, orchestra shell ceiling.
- Curtains, Tracks (End Stage): Horizontal shifting of curtains and scenery, lights are hung from catwalks.
- Sound: Recording/playback; effects; Speech and music reinforcement; theatre communication (Production Communication and Monitor Page).
- Television: tie lines; camera locations; power; cable pathway.
- Projection: 16mm film; 35 mm slides; television.
- Other: Touring show provisions (power and distribution for light and sound.

Major Functional Capabilities

The Proscenium Theatre has the fewest limitations for music, drama, dance, speech, media and language arts activities. However, it must also be said this fixed seat space concept is the most expensive and technically the most challenging to construct and operate. "Traditional" theatre forms typically convey the most immediate sense of a civic and school center and best serve touring artists. However, the Proscenium Theatre is not well suited for a range of school activities which lie outside the performing/communication arts. In many small Alaskan communities it is not practical to consider a Proscenium or Endstage Theatre unless the concept is reinforced by a strong community tradition in the performing arts, anticipation of a significant number of touring events, or plans for a major festival or tourist show.



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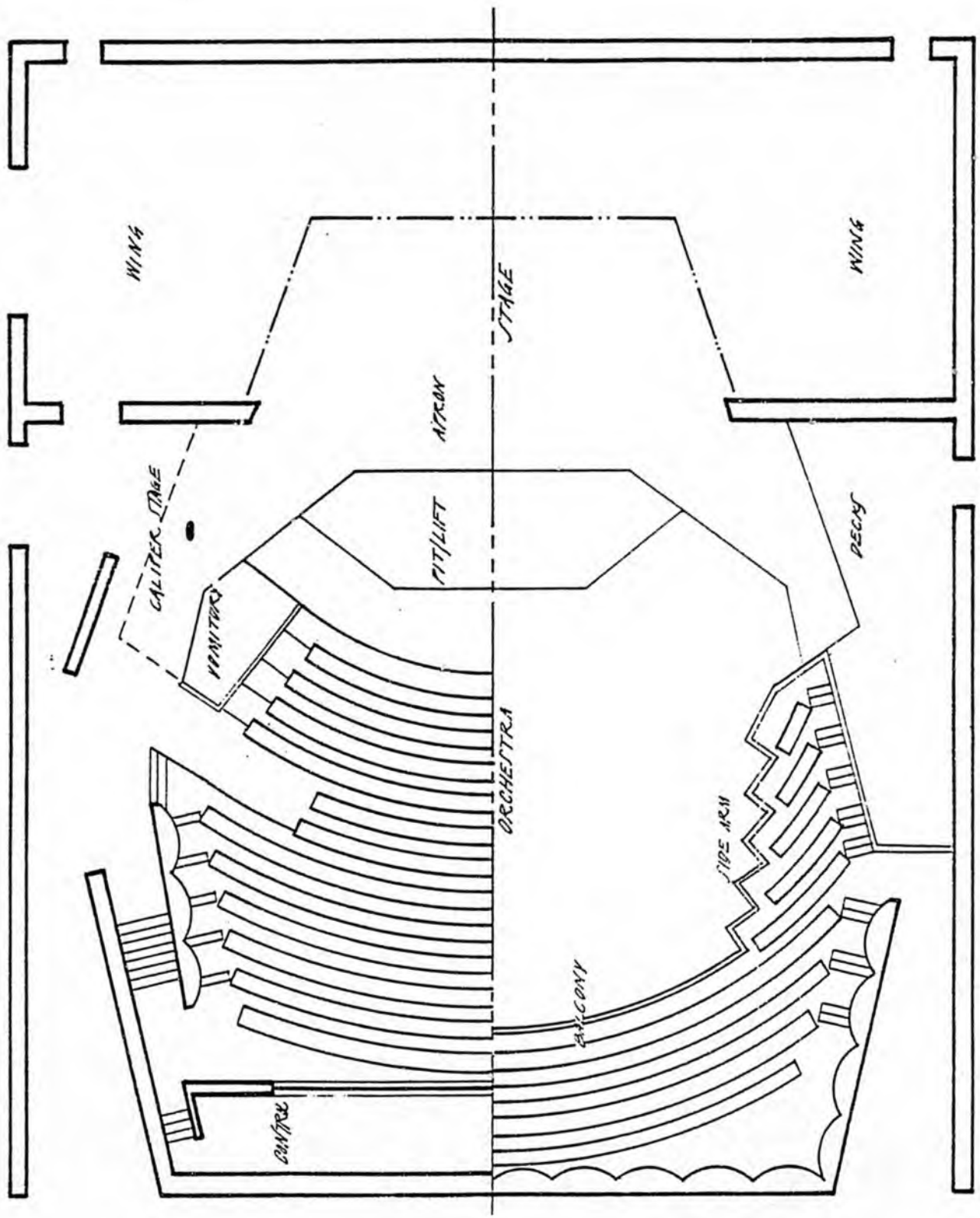
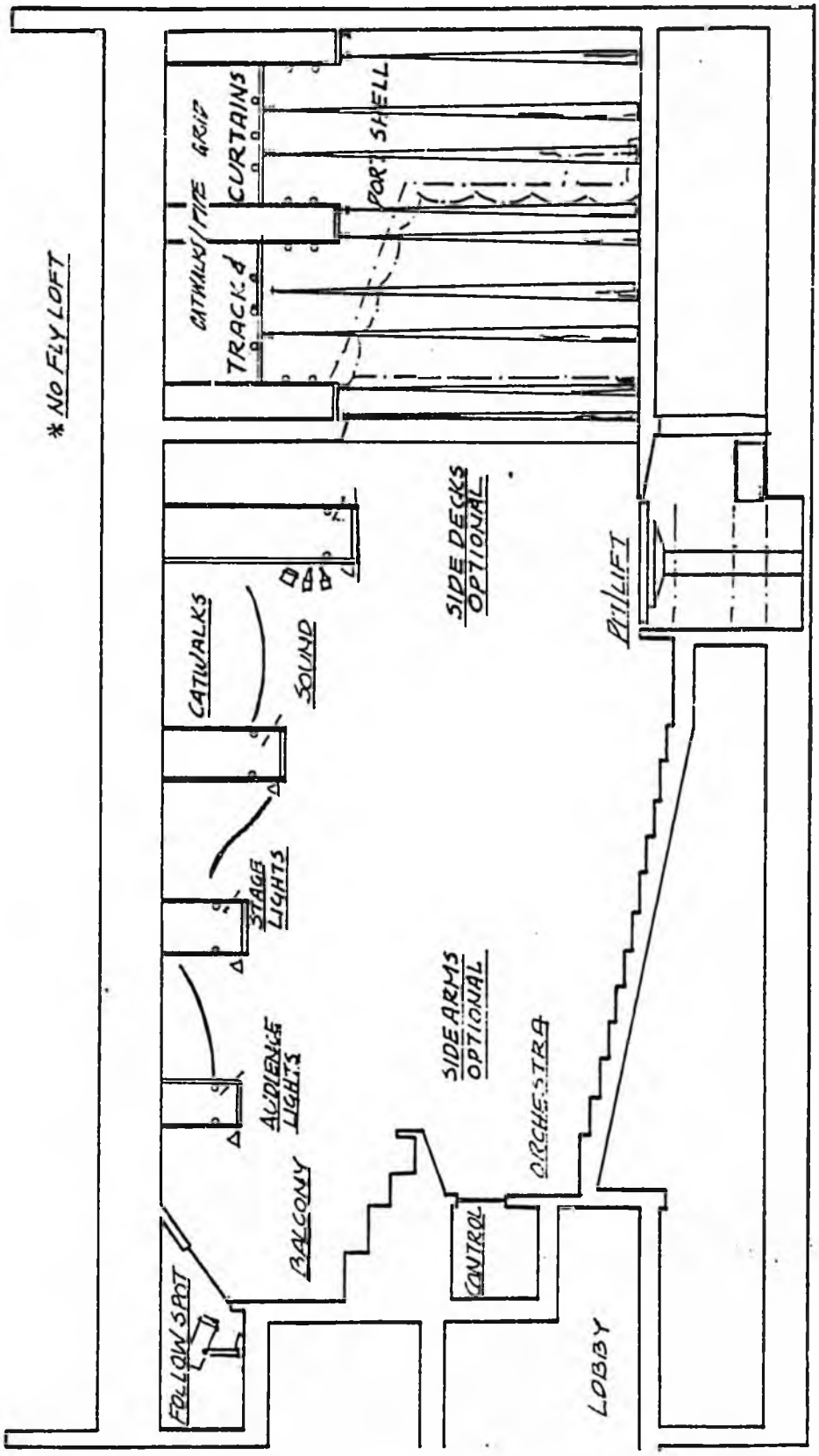
PROSCENIUM THEATRE



PROSCENIUM THEATRE

STAGE / HALF SEATING PLAN.

DRAWING SEVEN



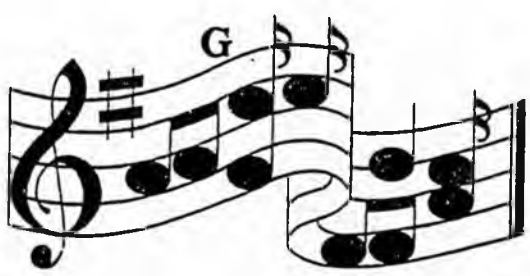
The selection of support spaces logically follows the selection of an architectural concept for the "primary" arts training/public assembly space. In small communities with limited arts programs and resources, the "primary" performance space may serve many functions. For instance, a large group instruction room or a library or gymnasium may be "upgraded" to include arts education and event scheduling. The success of such "upgrading" or expanded capability depends in part on good support space provisions.

There is almost unlimited variation in the quantity and type of support spaces that may be included for school performing/communication arts activities. Likewise, many school spaces programmed for other functions may, with modest additions and careful building layout, serve performing/communication arts functions. A student commons may be used as a lobby, a wood or metal shop may double as a scenery shop, a home economics lab may function for costume construction and a large group instruction room may be used for choral and instrumental rehearsal. The support space checklist is provided as a summary of functions associated with community and school performing arts programs. The design team should incorporate these functions into the total school space design. In many instances double or triple function is practical. The number and sophistication of support spaces should be determined in a project by project evaluation.

Each space should be evaluated for function priority, multi-use potential, circulation, code, and special requirements. The analysis of support functions and their corresponding spaces must be among the earliest program and design considerations.

Music Checklist

- Choral Rehearsal
- Instrumental Rehearsal
- Small Group Rehearsal
- Individual Rehearsal
- Music Library
- Instrument Storage
- Uniform and Music Equipment Storage
- Faculty Studios
- Artist in Residence Studio
- Piano Lab
- Classroom - Theory and Appreciation
- Listening Lab
- Recording Studio
- Other



Dance Checklist

- Rehearsal Room
- Changing Room/Costume Storage
- Other

Theatre Checklist

- Lobby/Gallery/Exhibit
- Box Office
- Concessions
- Coat Room
- Rest Rooms
- Follow Spotlight Booth
- Control Both: Light, Sound, Projection
- Orchestra Pit
- Trap Room
- Orchestra Shell Storage
- Drama Rehearsal Room
- Scenery Shop and Storage
- Costume Shop and Storage
- Loading Dock
- Dressing Rooms
- Green Room
- Storage - Props, Equipment, Costumes, Scenery
- Piano Storage
- Backstage Office(s)
- Dimmer Equipment Room
- Lift Equipment Room Speech/Language Arts
- General Classroom

Media

- Television, Film Studio
- Photo Labs
- Journalism Lab
- AV Equipment Lab

SYSTEM CONCEPTS

Performing arts spaces, like vocational shops or computer labs, are system intensive. Add to this the fact that shared and multi-use spaces often rely on systems for their conversion from function to function and it is apparent that early system planning is very important. Early planning for systems should focus on the following issues:

- Concepts which maximize space flexibility.

  Examples:

  Use of lighting systems to convert and reshape spaces for athletic, recreation, and arts activities.

  Use of portable seating systems for changing space configurations and room function.

  Use of tracks, curtains, and rigging to alter room function and room acoustics.

  Use of special floor surfaces for multi-event scheduling.

- System provisions which must be incorporated in early design to insure compatibility of spaces, systems and multiple use options.

  Examples:

  Heavy demand electrical loads

  Structures suitable for large clear span spaces and heavy loads

  Sound isolating constructions

  Provisions for guest performers

- Special Alaska problems

  Service and ongoing maintenance

  Shortage of trained operators

  Interrupted power

  Shipping and installation costs--early budget projections

The checklists and drawings for Space Concepts indicate major performance system requirements. It is beyond the scope of this document to propose specific designs for these systems. That is the province of the design team engineers and consultants. However, it is recommended that system concepts be given very high priority in early planning.

Building systems which will have the greatest impact on the performing/communication arts and multiple use scheduling include:

- HVAC — Room acoustics, mechanical system noise control
- Structures and Materials — Noise control and special equipment loading
- Finishes — Room acoustics
- Electrical — Lighting and sound systems

The performance systems which will have the greatest impact on space design include:

- Seating — Fixed and/or movable
- Lighting — Theatrical, audience, work/rehearsal, athletic/activity, general illumination
- Rigging, curtains, tracks
- Orchestra lift
- Orchestra enclosure
- Television
- Projection
- Sound — reinforcement, communication, record, playback, monitor
- Special floor surfaces
- Touring show provisions

Each of the systems noted should be evaluated for functional priority, multi-use potential, special code and building provisions. Early budget projections are <u>essential</u> to "protect" system concepts for the duration of the design and construction process.

Alaska State Legislature

BETTYE FAHRENKAMP, Chairman
ARLISS STURGULEWSKI, Vice Chairman
JOE JOSEPHSON
PAUL FISCHER
EDNA ARMSTRONG-DE VRIES

Superseded

POUCH V
STATE CAPITAL
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Senate

Committee on Health, Education and Social Services

April 3, 1985

Sectional Analysis of CS SB 51 (HESS)

Section 1 establishes a school construction grant account. School districts must repay to the state 10 percent of the funds received from the account within 10 years or contribute a like amount in kind.

Section 2 requires that school districts apply for school construction grants no later than October 15 of the fiscal year before the year for which the request is made.

Section 3 sets out the eligibility requirements a district must meet to receive a school construction grant. The district must be bonded to capacity or be unable to sell bonds, agree to an appropriately-sized facility, give public notice of the project, and demonstrate need for the project by establishing a projected long-term enrollment or have facilities requiring repair or replacement. Grant money may not be used for residential space, hockey rinks, planetariums, saunas, and other single purpose sporting facilities except for a small swimming pool or other water sports facility.

Section 4 amends the existing school construction debt retirement provisions (AS 14.11.100(a)). It limits the existing 50 percent retirement program to bonds approved and cash payments made before July 1, 1985.

Section 5 establishes a new provision for retirement of 80 percent of a municipality's bonded indebtedness authorized after June 30, 1985, for school construction. There is no provision for the reimbursement of cash payments after June 30, 1985.

Section 6 provides that State funds used to retire debt at 80 percent may not be used for the kinds of facilities described in Section 3, above.

Section 7 makes a technical amendment to AS 14.11.100(i) to clarify the application of that provision to the 50 percent retirement provision under AS 14.11.100(a)(5).

Section 8 sets out the requirements a municipality must meet before debt may be retired under the provisions added by Section 5 of the bill. The Commissioner of Education must approve the project before the local vote on the bond issue, as under current law. In approving the project, the commissioner must require the municipality to include the estimated costs, including operating and maintenance costs of the project in the ballot for the bond issue; provide for repayment of the bonds over a period of at least 10 years as under current law; demonstrate need for the project by establishing a projected long term enrollment or have facilities requiring repair or replacement; agree to an appropriately sized facility; and reduce the bond issue by taking into account interest that will be earned on the revenue of the bond issue during the repayment period.

Section 9 requires that reimbursement projects undergo prioritization by the commissioner as is done for grant projects, and requires that application for reimbursement be made no later than October 15 of the fiscal year before the year for which the request is made.

Section 10 amends AS 14.11.135 to apply the definitions in that section to the new provisions added by the bill, and defines "school district" to include municipal districts and REAAs.

Section 11 repeals the existing provisions providing for a public school construction advance account. The Department has indicated that this section was intended for districts who have reached their bonding capacity. The grant account established in Section 1 fulfills this need.

Section 12 provides for an effective date of July 1, 1985.

file SB 51

Alaska State Legislature

BETTYE FAHRENKAMP, Chairman
ARLISS STURGULEWSKI, Vice Chairman
JOE JOSEPHSON
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Superseded

Senate
Committee on
Health, Education and Social Services

April 17, 1985

Sectional Analysis of CS SB 51 (HESS)

Section 1 establishes a school construction grant account. School districts must repay to the state 10 percent of the funds received from the account within 10 years or contribute a like amount in the form of real property, site preparation, or capital improvements.

Section 2 requires that school districts apply for school construction grants no later than October 15 of the fiscal year before the year for which the request is made.

Section 3 requires the Department to rank requested projects in the following order of priority: health and safety, unhoused students, protection of structure, operating cost savings, building code upgrade, and functional upgrade. Current statute requires that this list be provided to the Governor and the Legislature.

Section 4 lists other factors to be evaluated in the prioritization process: local priorities, emergency requirements, number of students without classroom space, new programs, existing facilities, and the economic stability of the municipality.

Section 5 sets out the eligibility requirements a district must meet to receive a school construction grant. The district must agree to an appropriately-sized facility, and demonstrate need for the project by a projected long-term enrollment or facilities requiring repair or replacement. Grant money may not be used for student residential space, hockey rinks, planetariums, saunas, and other single purpose sporting facilities except for a small swimming pool. A grant may not be awarded until voter approval of the grant money is received. Interest earned on grants must be used for project costs.

Section 6 amends the existing school construction debt retirement provisions by limiting the existing 50 percent retirement program to bonds approved and cash payments made before July 1, 1985.

Section 7 increases from 50% to 75% the reimbursement for debt incurred before July 1, 1985. (Section 20 provides an effective date of July 1, 1986 for this section.)

Section 8 establishes a new provision for retirement of 75 percent of a municipality's bonded indebtedness authorized after June 30, 1985 for school construction. There is no provision for the reimbursement of cash payments after June 30, 1985.

Section 9 provides that State funds used to retire debt at 75 percent may not be used for the kinds of facilities described in Section 5 above.

Section 10 makes a technical amendment to AS 14.11.100(i) to clarify the application of that provision to the 50 percent retirement provision under AS 14.11.100(a)(5).

Section 11 sets out the requirements a municipality must meet before debt may be retired under the provisions added by Section 8 of the bill. The Commissioner of Education must approve the project before the local vote on the bond issue, as under current law. In approving the project, the commissioner must require the municipality to include the estimated costs, including operating and maintenance costs of the project, in the ballot for the bond issue; provide for repayment of the bonds over a period of at least 10 years as under current law; demonstrate need for the project by a projected long term enrollment or facilities requiring repair or replacement; and agree to an appropriately sized facility.

Section 12 provides that interest earned on the proceeds of bonds issued for a project be used only to pay the costs of the project and costs associated with the bond issue.

Section 13 requires that reimbursement projects undergo prioritization by the commissioner as is done for grant projects (under Sections 3 and 4), and requires that application for reimbursement be made no later than October 15 of the fiscal year before the year for which the request is made.

Section 14 amends AS 14.11.135 to apply the definitions in that section to the new provisions added by the bill, and defines "school district" to include municipal districts and REAAs.

Section 15 requires the Department to adopt regulations to carry out the purposes of this chapter. Proposed permanent regulations must be submitted to the Legislature, and become effective unless a law is enacted disapproving the regulations.

Section 16 requires municipalities that accept grants for school construction to meet the eligibility criteria set out in Section 5 of this act.

Section 17 clarifies that the eligibilty criteria established in Section 11 do not apply to projects that have received approval before the effective date of this act.

Section 18 repeals the existing provisions providing for a public school construction advance account. The Department has indicated that this section was intended for districts that are unable to

bond. The grant account established in Section 1 fulfills this need.

Section 19 establishes an effective date of July 1, 1985, except as provided in Section 20.

Section 20 delays the effective date of Section 7 (which increases the current 50% reimbursement level to 75%) until July 1, 1986.

Bartle Wells Associates
Municipal Financing Consultants
1636 Bush Street
San Francisco 94109
415 775-3113

file SB 51

MEMO TO: Josefa E. Wortman, Chief Financial Officer
Fairbanks North Star Borough

FROM: Lora J. Stovall
Bartle Wells Associates

SUBJECT: Borough Bond Issuance Policies

DATE: February 14, 1986

In our service as the borough's financial advisor since 1976 we have made two primary recommendations:

- The borough's bonds should be sold competitively.
- The borough's bonds should be sold in series as funds are needed for construction.

This letter will elaborate on the reasons for our past recommendations, which we still believe are in the borough's best interest for its upcoming bond issues.

COMPETITIVE VS. NEGOTIATED SALE

As financial advisor we have analyzed the results of many bond sales and have concluded that, in the vast majority of cases, competitive sales mean lower interest rates than negotiated sales. As a case in point, the following scales (page 2) are from the same underwriter, during the same week, for bonds with the same rating from Moody's. Interestingly, the lower-priced competitive sale had a rating of BB (below investment grade) from Standard & Poor's, while the higher-interest negotiated issue was rated BBB by Standard & Poor's. The negotiated issue was larger but was not a particularly large issue.

Issue sizes also tend to be smaller with competitive sales, which further reduce costs. Discount allowances are controlled. Reserve requirements and capitalized interest can be carefully watched to provide the necessary security at lower funding levels. The sale, closing, and delivery process is simpler and faster because the issuer sets the terms and the underwriter's bid explicitly accepts those terms.

Negotiated sales have their place on issues which are complicated or have extenuating circumstances, such as high delinquency rates or debt levels, risky projects, and on issues such as refundings, mortgage revenue bonds, and variable-rate bonds.

	SALE NO. 1	SALE NO. 2
Sale date	10/15/84	10/10/84
Rating - S&P	BBB	BB+
Rating - Moody's	--	Baa
Maturities	1988-2010	1987-2005
Placement	Negotiated	Competitive
Number of bids	--	5
Interest rates:		
1987		12.00*
1988	9.00	12.00
1989	9.50	12.00
1990	10.00	12.00
1991	10.50	9.50
1992	10.70	9.70
1993	10.80	9.90
1994	10.90	10.00
1995	11.00	10.10
1996	11.10	10.20
1997	11.20	10.30
1998	11.20	10.40
1999	11.25	10.50
2000	11.25	10.60
2001	↑	10.60
2002	↑	10.75
2003	↑	10.75
2004	↑	10.75
2005	Term	10.75
2006	↓	
2007	↓	
2008	↓	
2009	↓	
2010	11.50	
Discount	$1,980,000 (4.5%)	$47,203 (1.97%)
Net interest cost	~11.4%	10.71934%
Bond Buyer index (revenue)	10.93%	10.93%

*Interest rates from bid submitted by second bidder. Winning bid had NIC=10.4888%, discount of 1.94%.

SALE OF BONDS IN SERIES

When Bartle Wells Associates was hired as the borough's financial advisor, the borough was selling bonds in series of $3 million. We initially recommended that the borough increase the size of its issues. Our initial sale of borough bonds was the $15.5 million Series K, sold in 1976. We managed the sale of four series of bonds for the borough for school construction from 1982 through 1984. Our recommendations for the sale of the borough's bonds have been based on the following critieria:

- Bond issues should be small enough to stimulate competition in underwriting.
- Bond issues should be large enough to be cost-effective.
- In a series of financings each issue should finance one to one-and-a-half years of construction.
- The final bond sale of a sequence should consist of only the amount of bonds necessary to complete the construction projects.

The borough's voters authorized $70.3 million in school bonds in 1982—$2 million for Two Rivers School, $50 million for three elementary schools (ultimately Pearl Creek, Badger Road, and Rosamund Weller Schools), and the North Pole Junior/Senior High School improvements—and $18.3 million for the North Pole High School and Junior High School remodeling. The bonds were sold in four series totaling $64 million:

Series	Amount	Sale Date	Net Interest Cost
L	$17,000,000	1/26/82	12.25%
M	20,000,000	7/22/82	11.30
N	20,000,000	5/19/83	9.38
O	7,000,000	4/26/84	8.23

Each issue was designed to produce the lowest net interest cost at the time of sale. $6.3 million of authorized bonds were not sold because the project costs were lower than originally estimated. With voter approval, these bonds have been reallocated to additional projects.

The question borough staff has raised is: which is the most cost-effective technique—to sell bonds in series as we have advised, or to sell the full bond authorization promptly following voter approval and invest the proceeds until the funds are spent for construction. We have analyzed the actual results of the four series of bonds sold from 1982 to 1984 against the hypothetical results had the full authorizations

been sold earlier. The hypothetical sale of the full authorizations is based on the maturity schedule design and interest rates bid on the actual sales closest to the bond authorization date. Proceeds from all sales are assumed to have been invested at the bond interest rate (zero arbitrage). Actual reinvestment rates during the period would have varied over time and over the term of the investment, with some higher than the bond rate and some lower. The results of our analysis are summarized below. The supporting calculations follow this letter.

Actual Bond Sales	
Total principal	$ 64,000,000
Total interest	60,496,375
Estimated earnings	(2,721,700)
Net cost	$121,774,675
Average net interest cost	10.0565%
Bonds Sold as Authorized	
Total principal	$ 70,300,000
Total interest	65,239,875
Estimated earnings	(6,845,400)
Net cost	$128,694,475
Average net interest cost	10.723%
Net savings	$ 6,652,100

The net savings to the borough (and to the state, through the reimbursement program) was more than $6.6 million. Interest rates were declining in the period from 1982 through 1984, as demonstrated in the net interest costs on the borough's bond issues. Reinvestment rates also declined. This is shown in the significantly lower estimated earnings for the actual sales than for the hypothetical sales. Had interest rates risen during the period shown, the net costs to the borough and state of the hypothetical sales would have been relatively higher. We believe the most significant savings was in the borough's ability, through staging its bond sales to match construction results to date, to complete its projects while selling $3.6 million less than its total authorization of bonds. These bonds were subsequently reallocated, with voter approval, to other projects.

We believe that bonds are authorized by the voters for specific purposes and that bond proceeds, including earnings from the investment of those proceeds, should be used for those purposes and are not general funds of the borough. Furthermore, federal tax law is designed to prevent "overissuance" of bonds, i.e., to restrict the issuance of tax-exempt bonds to the amount necessary to construct specific projects within a three-year period, with allowances for the costs of borrowing, including bond reserve funds, capitalized interest, and issuance expenses. An estimate of anticipated earnings from the investment of bond proceeds is very commonly used to reduce the size of the bond issue to prevent overissuance.

LJS:mt
R49-A

FAIRBANKS NORTH STAR BOROUGH

ACTUAL DEBT SERVICE

Series	Principal	Interest	Total
L	$17,000,000	$15,618,750	$ 32,618,750
M	20,000,000	19,096,500	39,096,500
N	20,000,000	23,640,225	43,640,225
O	7,000,000	2,140,900	9,140,900
Totals	$64,000,000	$60,496,375	$124,496,375

Total bond years	574,500
Net interest, combined issues (total interest ÷ total bond years)	10.5303%

ESTIMATED INTEREST EARNINGS

Series	Average Balance*	Investment Term	Rate	Earnings
L	$ 8,500,000	6 mo.	12.25%	$ 520,625
M	10,000,000	1 yr.	11.30	1,130,000
N	10,000,000	1 yr.	9.38	938,000
O	3,500,000	6 mo.	8.23	144,025
				$2,721,700

*Assumes equal drawdown of principal over investment term shown; average balance equals half of principal amount.

FAIRBANKS NORTH STAR BOROUGH

HYPOTHETICAL DEBT SERVICE

Series L-1: Principal amount $52,000,000
Dated 2/1/82
Maturing 2/1/85 through 2/1/94
Equal annual principal payments of $5,200,000
Interest rates:
1984-90 12.00%
1991 12.25%
1992-94 12.50%
Net interest cost 12.25%

Series M-1: Principal amount $18,300,000
Dated 8/1/82
Maturing 8/1/85 through 8/1/94
Graduated principal payments
Interest rates:
1985-93 11.25%
1994 11.50%
Net interest cost 11.30%

Series	Principal	Interest	Total
L-1	$52,000,000	$47,775,000	$ 99,775,000
M-1	18,300,000	17,464,875	35,764,875
Totals	$70,300,000	$65,239,875	$135,539,875

Total bond years	544,550
Net interest, combined issues (total interest ÷ total bond years)	11.9805%

ESTIMATED INTEREST EARNINGS

Series	Average Balance*	Investment Term	Rate	Earnings
L-1	$26,000,000	18 mo.	12.25%	$4,777,500
M-1	9,150,000	2 yr.	11.30	2,067,900
				$6,845,400

*Assumes equal drawdown of principal over investment term shown; average balance equals half of principal amount.

Debt Service Schedule

GS
02-14-86

Fiscal Year	Payments	Reimbursement	Net Cost to Kero.
FY 85	06/30/25	12751825	12235373	(516452)
FY 86	06/30/86	14418275	13559005	(859270)
FY 87	06/30/87	14284675	13558737	(725938)

Final

SB 51 -- School Construction

Senate HESS
May 11, 1985

SENATE	HOUSE	CONFERENCE
75% reimbursement	80% reimbursement	80% reimbursement
no reimbursement of cash payment	reimbursement of cash payment	reimbursement of cash payment
projects that exceed Department's space guidelines are ineligible for state funding	state funds can't be used for portion of project that exceeds space guidelines	state funds can't be used for portion of project that exceed space guidelines
estimated O&M costs must be included on ballot for bond issue	not required	estimated O&M costs must be included on ballot for bond issue
limits state aid to needed projects, demonstrated though a projected long term student enrollment, unmet program needs, or facilities requiring repair or replacement	limits state aid to needed projects, demonstrated though a projected long term student enrollment, unmet program needs, or facilities requiring repair or replacement in order to meet health and safety codes	limits state aid to needed projects, demonstrated through a projected long term student enrollment or facilities requiring repair or replacement in order to meet health and safety codes
interest earned on bond proceeds must be used on project costs or costs of bond issuance	interest must be used on project costs	interest earned on bond proceeds must be used on project costs or costs of bond issuance
requests f r approval of debt reimbursement must be submitted by October 15	requests for allocation of funds must be submitted by October 15	requests for allocation of funds must be submitted by October 15

Department must prioritize projects based on weighted factors and present to the legislature	projects must be evaluated and presented to the legislature	projects must be evaluated and presented to the legislature
repeals the school construction advance account	does not repeal	does not repeal
requires that regulations be developed and reviewed by the legislature	not required	requires that regulations be developed and reviewed by the legislature
effective date July 1, 1985	effective date July 1, 1986	effective date July 1, 1985

the money used for construction that exceeds the amount needed for construction of a facility of efficient design as determined by the department. An allocation under (a)(4) or (5) of this section may not be reduced by the amount of money used for construction of a small swimming pool, tank, or water storage facility used for water sports. However, an allocation shall be reduced by the difference between the amount of money used to construct a swimming pool that exceeds the standards adopted by the department [IS COMPETITION SIZE OR LARGER] and the amount of money that would have been used to construct a small swimming pool, tank, or water storage facility, as determined by the commissioner.

* Sec. 3. AS 14.11.100(i) is amended to read:

(i) For the purposes of (a)(4) and (5) of this section

(1) an indebtedness for bonds is incurred after the bonds are sold;

(2) reimbursement for a cash payment may only be made after the payment is made to a vendor; and

(3) payments may not be made for costs that are incurred under a contract after the contract has been released.

* Sec. 4. AS 14.11.100(j) is amended to read:

(j) The state may not allocate money to a municipality for a school construction project under (a)(5) of this section unless the municipality complies with the requirements of (1) - (4) of this subsection and the project is approved by the commissioner before the local vote on the bond issue for the project. In approving a project under this subsection, the commissioner shall require

(1) the municipality to include on the ballot for the bond issue the estimated total cost of each project including estimated annual operation and maintenance costs and the estimated amounts that

will be paid by the state and by the municipality;

(2) that the bonds may not be refunded unless the annual debt service on the refunding issue is not greater than the annual debt service on the original issue;

(3) that the bonds must be repaid in approximately equal annual principal payments or approximate equal debt service payments over a period of at least 10 years;

(4) the municipality to demonstrate need for the project by establishing that the school district has

(A) projected long-term student enrollment that indicates the district has inadequate facilities to meet present or projected enrollment; or

(B) facilities that require repair or replacement in order to meet health and safety laws or regulations or building codes [; FACTORS SUCH AS INCREASED ENROLLMENT IN THE SCHOOL DISTRICT, THE HEALTH AND SAFETY OF THE STUDENTS, AND THE FACTORS LISTED IN AS 14.11.010(c)].

* Sec. 5. AS 14.11.100 is amended by adding a new subsection to read:

(k) An amount equal to the interest earned on the investment of the proceeds of bonds issued for a school construction project shall be used by the municipality to

(1) pay the costs of the project;

(2) pay accrued interest on the bond issue;

(3) redeem all or part of the bonds; or

(4) pay the costs of issuing the bonds.

* Sec. 6. AS 14.11 is amended by adding a new section to read:

Sec. 14.11.102. EVALUATION OF PROJECTS. The department shall evaluate projects for which retirement of school construction debt is requested by school districts in accordance with the procedures set

out in AS 14.11.010. A request for an allocation of funds under AS 14.11.100 must be submitted to the department by the school district no later than October 15 of the fiscal year before the fiscal year for which the request is made.

* Sec. 7. AS 14.11.135 is amended to read:

Sec. 14.11.135. DEFINITIONS. In this chapter [AS 14.11.100 - 14.11.135], unless the context requires otherwise,

(1) "approved school construction project" means the plan for a new school or an addition to or major rehabilitation of an existing school to the extent to which approved by the commissioner in accordance with AS 14.07.020(11);

(2) "commissioner" mean the commissioner of education;

(3) "costs of school construction" means the cost of acquiring, constructing, enlarging, repairing, remodeling, equipping or furnishing of public elementary and secondary school buildings and includes the sum total of all costs of financing and carrying out the project; these include, but are not limited to, the costs of all necessary studies, surveys, plans and specifications, architectural, engineering or other special services, acquisition of real property, site preparation and development, purchase, construction, reconstruction and improvement of real property and the acquisition of machinery and equipment as may be necessary in connection with the project; an allocable portion of the administrative and operating expenses of the grantee; the cost of financing the project, including interest on bonds issued to finance the project; and the cost of other items, including any indemnity and surety bonds and premiums on insurance, legal fees, fees and expenses of trustees, depositaries, financial advisors, and paying agents for the bonds issued as the issuer considers necessary;

AN ACT

Relating to state aid for school construction; and providing for an effective date.

* Section 1. AS 14.11.100(a)(5) is amended to read:

(5) subject to (h), [AND] (i), and (j) of this section, 80 [50] percent of

(A) payments made by the municipality during the fiscal year for the retirement of principal and interest on outstanding bonds, notes or other indebtedness authorized by the qualified voters of the municipality after June 30, 1983, to pay costs of school construction, additions to schools, and major rehabilitation projects that exceed $25,000 and are approved under AS 14.07.020(11); and

(B) cash payments made after June 30, 1983, by the municipality during the fiscal year two years earlier to pay costs of school construction, additions to schools, and major rehabilitation projects that exceed $25,000 and are approved under AS 14.07.020(11).

* Sec. 2. AS 14.11.100(h) is amended to read:

(h) An allocation under (a)(4) or (5) of this section for school construction begun after July 1, 1982, shall be reduced by the amount of money used for the construction of residential space, hockey rinks, planetariums, saunas, and other facilities for single purpose sporting or recreational uses that are not suitable for other activities and b-

(4) "department" means the Department of Education.

* Sec. 8. AS 14.11 is amended by adding a new section to read:

Sec. 14.11.140. REGULATIONS. The department shall adopt regulations to carry out the purposes of this chapter.

* Sec. 9. LEGISLATIVE REVIEW. Proposed permanent regulations under AS 14.11.140 as enacted in sec. 8 of this Act shall be submitted to the legislature no later than the 10th day of the Second Session of the Fourteenth Alaska State Legislature. Notwithstanding AS 44.62, permanent regulations adopted under AS 14.11.140 take effect the 90th day of the Second Session of the Fourteenth Alaska State Legislature, unless a law is enacted disapproving the regulations.

* Sec. 10. (a) The amendments to AS 14.11.100(j) provided for in sec. 4 of this Act apply only to school construction projects approved by the commissioner of education after the effective date of this Act.

(b) The requirement of AS 14.11.102, added by sec. 6 of this Act, that requests for an allocation of funds under AS 14.11.100 be submitted by October 15 of the fiscal year before the fiscal year for which the request is made, does not apply to requests for fiscal year 1987.

* Sec. 11. This Act takes effect July 1, 1985.

LAWS OF ALASKA

1985

Source

CCSSB 51

Chapter No.

78

AN ACT

Relating to state aid for school construction; and providing for an effective date.

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

THE ACT FOLLOWS ON PAGE 1, LINE 9

UNDERLINED MATERIAL INDICATES TEXT THAT IS BEING ADDED TO THE LAW AND BRACKETED MATERIAL IN CAPITAL LETTERS INDICATES DELETIONS FROM THE LAW; COMPLETELY NEW TEXT OR MATSRIAL REPEALED AND RE-ENACTED IS IDENTIFIED IN THE INTRODUCTORY LINE OF EACH BILL SECTION.

Approved by the Governor: June 2, 1985
Actual Effective Date: July 1, 1985

(4) "department" means the Department of Education.

* Sec. 8. AS 14.11 is amended by adding a new section to read:

Sec. 14.11.140. REGULATIONS. The department shall adopt regulations to carry out the purposes of this chapter.

* Sec. 9. LEGISLATIVE REVIEW. Proposed permanent regulations under AS 14.11.140 as enacted in sec. 8 of this Act shall be submitted to the legislature no later than the 10th day of the Second Session of the Fourteenth Alaska State Legislature. Notwithstanding AS 44.62 permanent regulations adopted under AS 14.11.140 take effect the 90th day of the Second Session of the Fourteenth Alaska State Legislature, unless a law is enacted disapproving the regulations.

* Sec. 10. (a) The amendments to AS 14.11.100(j) provided for in sec. 4 of this Act apply only to school construction projects approved by the commissioner of education after the effective date of this Act.

(b) The requirement of AS 14.11.102, added by sec. 6 of this Act, that requests for an allocation of funds under AS 14.11.100 be submitted by October 15 of the fiscal year before the fiscal year for which the request is made, does not apply to requests for fiscal year 1987.

* Sec. 11. This Act takes effect July 1, 1985.

out in AS 14.11.010. A request for an allocation of funds under AS 14.11.100 must be submitted to the department by the school district no later than October 15 of the fiscal year before the fiscal year for which the request is made.

* Sec. 7. AS 14.11.135 is amended to read:

Sec. 14.11.135. DEFINITIONS. In this chapter [AS 14.11.100 - 14.11.135], unless the context requires otherwise,

(1) "approved school construction project" means the plan for a new school or an addition to or major rehabilitation of an existing school to the extent to which approved by the commissioner in accordance with AS 14.07.020(11);

(2) "commissioner" means the commissioner of education;

(3) "costs of school construction" means the cost of acquiring, constructing, enlarging, repairing, remodeling, equipping or furnishing of public elementary and secondary school buildings and includes the sum total of all costs of financing and carrying out the project; these include, but are not limited to, the costs of all necessary studies, surveys, plans and specifications, architectural, engineering or other special services, acquisition of real property, site preparation and development, purchase, construction, reconstruction and improvement of real property and the acquisition of machinery and equipment as may be necessary in connection with the project; an allocable portion of the administrative and operating expenses of the grantee; the cost of financing the project, including interest on bonds issued to finance the project; and the cost of other items, including any indemnity and surety bonds and premiums on insurance, legal fees, fees and expenses of trustees, depositaries, financial advisors, and paying agents for the bonds issued as the issuer considers necessary;

AN ACT

Relating to state aid for school construction; and providing for an effective date.

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* Section 1. AS 14.11.100(a)(5) is amended to read:

(5) subject to (h), [AND] (i), and (j) of this section, 80 [50] percent of

(A) payments made by the municipality during the fiscal year for the retirement of principal and interest on outstanding bonds, notes or other indebtedness authorized by the qualified voters of the municipality after June 30, 1983, to pay costs of school construction, additions to schools, and major rehabilitation projects that exceed $25,000 and are approved under AS 14.07.020(11); and

(B) cash payments made after June 30, 1983, by the municipality during the fiscal year two years earlier to pay costs of school construction, additions to schools, and major rehabilitation projects that exceed $25,000 and are approved under AS 14.07.020(11).

* Sec. 2. AS 14.11.100(h) is amended to read:

(h) An allocation under (a)(4) or (5) of this section for school construction begun after July 1, 1982, shall be reduced by the amount of money used for the construction of residential space, hockey rinks, planetariums, saunas, and other facilities for single purpose sporting or recreational uses that are not suitable for other activities and by

the money used for construction that exceeds the amount needed for construction of a facility of efficient design as determined by the department. An allocation under (a)(4) or (5) of this section may not be reduced by the amount of money used for construction of a small swimming pool, tank, or water storage facility used for water sports. However, an allocation shall be reduced by the difference between the amount of money used to construct a swimming pool that exceeds the standards adopted by the department [IS COMPETITION SIZE OR LARGER] and the amount of money that would have been used to construct a small swimming pool, tank, or water storage facility, as determined by the commissioner.

* Sec. 3. AS 14.11.100(i) is amended to read:

(i) For the purposes of (a)(4) and (5) of this section

(1) an indebtedness for bonds is incurred after the bonds are sold;

(2) reimbursement for a cash payment may only be made after the payment is made to a vendor; and

(3) payments may not be made for costs that are incurred under a contract after the contract has been released.

* Sec. 4. AS 14.11.100(j) is amended to read:

(j) The state may not allocate money to a municipality for a school construction project under (a)(5) of this section unless the municipality complies with the requirements of (1) - (4) of this subsection and the project is approved by the commissioner before the local vote on the bond issue for the project. In approving a project under this subsection, the commissioner shall require

(1) the municipality to include on the ballot for the bond issue the estimated total cost of each project including estimated annual operation and maintenance costs and the estimated amounts that

will be paid by the state and by the municipality;

(2) that the bonds may not be refunded unless the annual debt service on the refunding issue is not greater than the annual debt service on the original issue;

(3) that the bonds must be repaid in approximately equal annual principal payments or approximate equal debt service payments over a period of at least 10 years;

(4) the municipality to demonstrate need for the project by establishing that the school district has

(A) projected long-term student enrollment that indicates the district has inadequate facilities to meet present or projected enrollment; or

(B) facilities that require repair or replacement in order to meet health and safety laws or regulations or building codes [; FACTORS SUCH AS INCREASED ENROLLMENT IN THE SCHOOL DISTRICT, THE HEALTH AND SAFETY OF THE STUDENTS, AND THE FACTORS LISTED IN AS 14.11.010(c)].

* Sec. 5. AS 14.11.100 is amended by adding a new subsection to read:

(k) An amount equal to the interest earned on the investment of the proceeds of bonds issued for a school construction project shall be used by the municipality to

(1) pay the costs of the project;

(2) pay accrued interest on the bond issue;

(3) redeem all or part of the bonds; or

(4) pay the costs of issuing the bonds.

* Sec. 6. AS 14.11 is amended by adding a new section to read:

Sec. 14.11.102. EVALUATION OF PROJECTS. The department shall evaluate projects for which retirement of school construction debt is requested by school districts in accordance with the procedures set

Alaska State Legislature

BETTYE FAHRENKAMP, Chairman
ARLISS STURGULEWSKI, Vice Chairman
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Senate

Committee on Health, Education and Social Services

M E M O R A N D U M

TO: Members, Senate Committee on Health, Education and Social Services

FROM: Committee Staff

RE: Committee Meeting, March 21, 1985

DATE: March 20, 1985

On Thursday, March 21, at 1:30 pm in the Beltz Room, the Senate Committee on Health, Education and Social Services will hear the following bills:

SB 51 and SB 159, Relating to state aid for school construction.

Under existing AS 14.11.100, state aid for retirement of school construction debt is allocated based on payments made by a municipality during previous fiscal years. Current statute provides a 90% reimbursement for bonded indebtedness incurred by a municipality prior to 1983, and a 50% reimbursement for debt incurred after 1983. SB 51 would increase the reimbursement for indebtedness incurred after 1983 to 90%, and provide that funds be distributed pro rata among municipalities having an annual growth rate of 5% or more, with remaining funds distributed among other municipalities. SB 159 would increase reimbursement for indebtedness incurred after 1983 to 75%.

SB 187, An Act relating to adoption.

Current statute authorizes the Department of Health and Social Services to promulgate regulations governing the inspection of original birth certificates of adopted children. Current regulations allow an adult adoptee to request and receive an uncertified copy of his or her original birth certificate. SB 187 would establish a statutory procedure governing access to

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Senate

Committee on
Health, Education and Social Services

May 11, 1985

SUMMARY OF CONFERENCE COMMITTEE SUBSTITUTE

SB 51

RELATING TO STATE AID FOR SCHOOL CONSTRUCTION

Section 1 increases from 50% to 80% the reimbursement for bonded indebtedness authorized by a municipality after June 30, 1983 and for cash payments made after June 30, 1983. Existing projects (Wrangell, Kenai, Mat-Su) would be eligible for 80% reimbursement on payments made after the effective date of the act.

Section 2 provides that State funds used to retire debt at 80% may not be used for construction of residential space, hockey rinks, planetariums, saunas and the like. This prohibition applies to existing debt projects.

Section 3 makes a technical amendment to AS 14.11.100(i) to clarify the application of that provision to the 80% retirement provision.

Section 4 sets out the requirements a municipality must meet before debt may be retired under Section 1. The Commissioner of Education must approve the project before the local vote on the bond issue as under current law. In approving the project, the commissioner require the municipality to include the estimated operating and maintenance costs on the ballot for the bond issue, demonstrate need for the project by a projected long term enrollment or facilities requiring repair or replacement, and provide for repayment of the bonds over a 10 year period as under current law.

Section 5 provides that interest earned on the proceeds of bonds issued for a project be used only to pay the costs of the project and costs associated with the bond issuance.

Section 6 requires the Department to evaluate projects, rank projects in the order of priority that serves the best interests of the state, and present a priority list to the legislature. It also requires that municipal requests for funds be submitted to the department by October 15 of the preceding fiscal year.

Section 7 expands the current definition section to apply to the provisions of SB 51.

Section 8 clarifies that the eligibility criteria established in Section 4 do not apply to projects that have received approval before the effective date of the act, and waives the October 15 funding request deadline for the first year.

Section 9 requires the Department to adopt regulations to implement the chapter.

Section 10 provides for proposed permanent regulations to be submitted to the legislature; they would become effective unless a law disapproving them is enacted.

Section 11 provides for a July 1, 1985 effective date.

Bettye
NEW

BILL SHEFFIELD
GOVERNOR

STATE OF ALASKA
OFFICE OF THE GOVERNOR
JUNEAU

May 10, 1985

The Honorable Bettye Fahrenkamp
Chairman
Conference Committee on School
Construction Aid
Pouch V
Juneau, AK 99811

Dear Madam Chairman:

I have reviewed the bills which relate to school construction, CBHS 191 (Fin) and HCSCSSB 51 (Fin), passed by the House and Senate, and the versions which preceded them.

The State Board of Education and I are disappointed that a more comprehensive approach to school construction cost containment, as developed by both House and Senate HESS Committees, did not come to the floor. Without adequate control of construction costs, we will be unable to control the long-term operating costs of schools.

It is my view that limiting school construction costs is essential if the State is to continue to meet its obligation to provide an equal educational opportunity to all students and to continue a high level of support for the operation of public education in Alaska. In that respect, I do not favor expansion of the debt retirement reimbursement rate beyond 75 percent. Taxpayer responsibility for a significant portion of municipal school district construction costs is essential to cost containment.

Projects must be evaluated by the strictest standards. The project evaluation language contained in CSSB 51 (Fin) provides greater guidance to the Department of Education in this important task. However, both House and Senate bills pose significant administrative and implementation difficulties as they do not fully assure that new projects will not be approved until regulations are in place; further they do not provide a clearly understood mechanism to prevent unlimited access to the debt reimbursement program. I urge the Legislature to address these issues.

Similar approval standards for all projects are essential to an equitable sharing of the State's resources for education. Because uniform requirements for both grant and debt financed projects have been dropped from the bills in their present form, it is my intention to ask the Commissioner of Education to apply those standards developed for the debt retirement program to projects funded by grants.

Sincerely,

Bill Sheffield
Governor