



# ASSEMBLY FINANCE COMMITTEE AGENDA

May 03, 2023 at 5:30 PM

Assembly Chambers/Zoom Webinar

<https://juneau.zoom.us/j/93917915176> or 1-253-215-8782 Webinar ID: 939 1791 5176

**A. CALL TO ORDER**

**B. ROLL CALL**

**C. APPROVAL OF MINUTES**

1. April 26, 2023

**D. AGENDA TOPICS**

2. Update on FY24 Revenue Forecast

3. School District Budget - For Action

a. Outside the Cap Funding

b. School District Budget Ordinance 2023-15

4. Assembly Grants & Community Requests

a. Dimond Park Field House Elevator (Southeast Alaska Independent Living)

b. Juneau Commission on Aging

c. Juneau Housing First Collaborative

d. The Alaska Committee

e. Juneau Economic Development Council

f. Alaska Heat Smart

g. Juneau Nordic Ski Club

5. Overview of Increments Included in Manager's FY24 Proposed Budget

6. Manager's FY24 Proposed Budget Amendments

7. Parental Leave (Red Folder)

8. Fare Free Transit

9. Capital Improvement Plan & 1% Sales Tax Allocation Amendments (none received from Assembly)

10. Updated Budget Summary and FY24 Decision List

11. Info Only: AFC Budget Calendar

**E. SUPPLEMENTAL MATERIALS**

12. Parental Leave Memo

**F. NEXT MEETING DATE**

13. May 10, 2023

**G. ADJOURNMENT**

ADA accommodations available upon request: Please contact the Clerk's office 36 hours prior to any meeting so arrangements can be made for closed captioning or sign language interpreter services depending on the meeting format. The Clerk's office telephone number is 586-5278, TDD 586-5351, e-mail: [city.clerk@juneau.org](mailto:city.clerk@juneau.org).

**ASSEMBLY FINANCE COMMITTEE MINUTES - DRAFT**

**April 26, 2023, at 5:30 PM**

**Assembly Chambers/Zoom Webinar**



<https://juneau.zoom.us/j/93917915176> or 1-253-215-8782 Webinar ID: 939 1791 5176

**A. CALL TO ORDER**

The meeting was called to order at 5:57 pm by Chair Triem.

**B. ROLL CALL**

Committee Members Present: Chair Carole Triem; Michelle Hale; Greg Smith; Christine Woll; Alicia Hughes-Skandijs; Wade Bryson

Committee Members Present Virtually: Mayor Beth Weldon, Maria Gladziszewski

Committee Members Absent: Wáahlaal Gíidaak

Staff Members Present: Rorie Watt, City Manager; Jeff Rogers, Finance Director; Adrien Speegle, Budget Manager; Carl Uchytíl, Docks and Harbors Port Director; Alexandra Pierce, Tourism Manager

Others Present: Don Etheridge, Docks and Harbors Board Chairman; Jim Becker, Docks and Harbors Board Vice Chairman; McHugh Pierre, Travel Juneau Chair; Liz Perry, Travel Juneau President

**C. APPROVAL OF MINUTES**

**1. April 19, 2023**

**Motion: by Assemblymember Hale to approve minutes as corrected.**

**Motion passed by unanimous consent.**

**D. AGENDA TOPICS**

**2. Docks & Harbors FY24 Budget Presentation**

Carl Uchytíl, Port Director, thanked the assembly for their support in funding projects over the last few years, leading to several projects being completed. Mr. Uchytíl stated that as a result of these contributions, the Docks enterprise is expected to end FY23 by adding to the fund balance and not drawing from it.

Mr. Uchytíl presented the Docks budget overview found on page 10 of the packet, emphasizing for the Committee the rise in staffing counts, which has generated a rise in personnel services cost for FY24. He further stated that other than personnel changes, the budget for FY24 remains largely unchanged from FY23.

Mr. Uchytíl reviewed the rate changes that were approved by the Assembly in February 2022 in order to generate additional revenue for Docks. Dock fees have not changed since 2008 despite rising operations cost. The largest change is to allow Dock fees to change yearly relative to changes in the Consumer Price

Index (CPI). This is a large change in revenue generation for Docks and results in an 8.1% increase effective April 1<sup>st</sup>.

Mr. Uchytel answered Committee questions regarding the nature of dock fees and how Juneau fees compare with how fees are collected elsewhere. He stated that port fees are hard to compare, due to the varying nature of how Dock fees are determined city to city.

Assemblymember Gladziszewski asked why the effective date for Dock fees are not in line with the fiscal year dates. Mr. Uchytel clarified that the Committee made a decision previously for changes in fees that affect tourism groups to take effect on April 1<sup>st</sup> every year, instead of taking place at the beginning of the fiscal year. This was done to minimize changes that the tourism industry will face throughout the cruise ship season.

Rorie Watt, City Manager, explained that the way that Dock fees are created is due to a multitude of factors and stressed that a large reason port fees are hard to compare is that these fees are developed with the infrastructure of the city in question. Things that are easy for Juneau to provide might be hard for another city to provide, and therefore every city uses different structures in determining rate fees. As an example, Mr. Watt stated that some cities use a flat rate for water, whereas a city that struggles to provide water might charge a different rate to collect more from that service.

Mr. Uchytel reviewed for the Committee page 15 of the packet, which shows the previous 11 years' revenue and expenditures and the corresponding fund balance. This chart shows a significant dip in revenue during pandemic years, resulting in a significant decrease in fund balance correspondingly. This has recovered somewhat in the previous year, however, has not recovered fully.

Mr. Uchytel presented the budget overview for the Harbors enterprise found on page 16 of the packet. He stated that Harbors has been sought to be diligent with maintaining its FTE count over the years, however, this year there is a need to expand hours to include 7 days a week which resulted in a corresponding rise in personnel services accounting for a rise from 16.83 FTE to 17.45 FTE.

Mr. Uchytel answered Committee questions.

Mr. Uchytel further reviewed the Harbors enterprise major expenditure items for the Committee found on page 179 of the packet stating that they make up 75% of the budget.

Mr. Uchytel reviewed the nature of the lease agreement that Harbors has maintained with UAS for the Juneau Fisheries Terminal, stating that this terminal is considered a critical need. He further stated that UAS also considers this to be a high value property but does not have concrete plans for the property. Historically, CBJ has maintained a favorable lease of \$12,000 a year for the property lease, however, UAS wishes to raise the lease to \$100,000 a year for a four-year contract. Mr. Uchytel stated that in the proposed lease agreement, CBJ will have to provide an educational benefit for UAS students. The alternative would be to lease the property from UAS at fair market value of \$230,400 a year.

Mr. Uchytel reviewed proposed items to meet this educational benefit found on page 181 of the packet.

Mr. Watt expressed support for the ideas proposed and stated that there is merit to investing in student involvement in the community. He responded to Committee concerns about making community services available for UAS students but not to city employees. Mr. Watt stated that UAS students are here a relatively short amount of time but many leave after they are done with school. Involving them more in

the community would help with retain some of these students in Juneau longer. Mr. Watt further stated that the expense impact for implementing these benefits would be minimal.

Assemblymember Gladziszewski asked what the options are for buying the property outright instead of renewing the lease. Mr. Uchtyl stated that UAS is not interested in selling the property or even partial portions of the property. He further stated that Docks & Harbors is strongly committed to trying to retain this property.

Mayor Beth Weldon asked if the revenue generated from CBJ operations on the property would cover the new lease cost. Mr. Uchtyl responded that the answer is no, however, with the rise in the lease price, it is an option to consider negotiations of higher revenue rates.

Mr. Uchtyl continued his presentation on page 182 of the packet, reviewing the historic trends in harbors revenue, expenditure and remaining fund balance. The trend shown in this presentation is that there is a large dip in fund balance between FY16 and the upcoming FY24. This is largely due to dock improvements that have been made over previous years.

Mr. Uchtyl reviewed for the Committee the trend of rising fees, particularly in the cost of insurance which has more than tripled since FY19. For the most part this rise is not due to claims, although Harbors did make a claim in 2020 for damages to Statter Harbor.

Mr. Uchtyl further reviewed pages 185-186 of the packet which shows a drastic inflation of construction costs for Harbor floats and the electrical systems needed to run them. The cost per-square-foot for dock floats in 2020 for Statter Harbor was \$165 while the cost per-square-foot for the new Aurora harbor in 2023 was \$297, almost doubling in cost. Furthermore, the cost in electrical systems in 2020 for Statter harbor was \$40 per square foot while in 2023 the cost for the new Aurora harbor was \$280, a nearly 700% rise in just three years.

Mr. Uchtyl stressed the challenges that these inflated costs have had on current harbor constructions and the impact it will have on future projects.

**Motion: by Assemblymember Smith to approve the Docks & Harbors budgets as presented.**

**Motion passes by unanimous consent.**

*The Committee recessed at 6:56 pm.*

*The Committee reconvened at 7:05 pm.*

*At 7:06 pm a member of the community, Brandee Gerke, arrived to give public comment on the Special Assembly meeting that occurred before the AFC meeting. The Committee allowed her to give public comments and her statements are recorded in the minutes for the Special Assembly Meeting.*

### **3. FY24 Passenger Fee Plan – For Review**

Alexandra Pierce, Tourism Manager, began by presenting the recent changes to the FY24 Passenger Fee Proposal, reviewing for the Committee each item that was changed. She stressed the rise in estimated cost of \$35,000 to \$100,000 for a Cruise Ship Passenger Survey, acknowledging that a portion of this amount is for economic analysis.

Ms. Pierce further stated that there was an additional line item of Commercial Recreational Use Strategy of \$120,000 to address the impacts of cruise ship tourist disbursement. Additionally, the Seasonal Workforce Housing Planning of \$50,000 was moved from the Assembly Grant funding portion of the proposal to the CBJ Municipal Service section. These changes are reflected on page 34 of the packet and result in changes to the overhead cost columns and the direct costs column.

Mr. Rogers addressed Committee questions regarding the changes in overhead costs on page 34 of the packet, stating that although the allocation amount has changed for every item, the total cost for overhead is to remain the same.

Ms. Pierce answered further Committee questions.

Assemblymember Hughes-Skandijs asked regarding the limits of spending Passenger Fees. Mr. Watt stated that there are zones where the Committee can spend Passenger Fees freely and zones where there are limits. He further stated that the Committee does maintain control over how the Passenger Fees are spent, however, in the efforts to be collaborative there are meetings with the cruise ship industry to discuss how the funds are being spent.

Ms. Pierce further reviewed for the Committee the capital improvement portions of the proposed FY24 budget. This budget includes allocations for Capital Civic Center, Marine Park improvements, Homestead Park improvements, Wastewater improvements, Informational Signage, Circulator Plan, and Seawalk expansion for a total of just over \$15 million.

Mr. Watt addressed Committee questions on the wastewater project stating that it is to address the need for waste processing from cruise ships so that it becomes less burdensome for the city.

Ms. Pierce stated to the Committee that the funds of \$10 Million that are budgeted for the Seawalk expansion are broad on purpose and is up for assembly decision. Mr. Watt stated that one of the projects that the Committee has expressed interest in is the deck over project detailed on page 120 of the packet.

Ms. Pierce addressed questions regarding the expansion of the Seawalk, stating that there are several ways the Seawalk could be expanded. There is the potential for an AJ to Franklin Dock segment as well as the potential for filling in portions of the Seawalk that is currently open. Mr. Watt further stated that the projects are not the same size in terms of costs and there is potential for multiple projects.

Ms. Pierce responded to further questions from the Committee as to the potential for the connection of the Seawalk through the Gold Creek area, stating that there are many private land ownership barriers to expanding Seawalk in that location.

**Motion: by Mayor Weldon to dedicate a portion of the \$10 million allocated for Seawalk expansion for a deck over of the open space next to the Archipelago Lot.**

**Objection: by Assemblymember Hughes-Skandijs for the purpose of stating that the current hole in the Seawalk adds to the charm and enables guests to see wildlife under the deck.**

Mr. Watt reviewed for the Committee the historical interest in the deck over project, stating that there has been interest from the public in decking over this portion of the Seawalk.

Mr. Watt responded to concerns by the Committee regarding the businesses that operate along the waterfront and concerns that they would get additional space for free. Mr. Watt stated that the current business that operates in this location leases the space and would not be able to use the potential new space without a fee increase.

**Roll Call Vote:**

**Ayes:** Weldon, Woll, Hale, Bryson

**Nays:** Triem, Gladziszewski, Smith, Hughes-Skandijs

**Motion failed. Four (4) Ayes, Four (4) Nays.**

Mr. Watt and Ms. Pierce answered further questions from the Committee.

**Motion: by Assemblymember Hughes-Skandijs to propose an amendment to the 3<sup>rd</sup> Party Visitor section of the Passenger Fee Proposal to zero out the lines for AJ Dock and Franklin Dock Access Security and Restroom Maintenance.**

Assemblymember Hughes-Skandijs stated that because the Franklin and AJ docks are private docks, they should be fully responsible for maintaining these services.

**Objection: by Mayor Weldon for the purpose of stating that the private docks provide passenger fee revenue and the money provided for restrooms and security are appropriate.**

Ms. Pierce, in response to Committee questions, stated that these restrooms and security service for the private docks are available to serve the public. She recommends maintaining the course in this funding for FY24.

**Roll Call Vote:**

**Ayes:** Triem, Hughes-Skandijs

**Nays:** Weldon, Gladziszewski, Hale, Smith, Woll, Bryson

**Motion failed. Two (2) Ayes, Six (6) Nays.**

**4. Hotel-Bed Tax Funding**

Mr. Rogers presented the overview of Hotel-Bed Tax funding focusing on the summary of funding allocations found on page 141 of the packet. Hotel-Bed Tax is a 9% tax and is split between the following funding areas: 4% for Travel Juneau destination marketing, 3% for Centennial Hall operations, and 2% for Centennial Hall improvements. Mr. Rogers stated that the current structure of these allocations is leading to a surplus in funding and that the Committee might wish to discuss how to use these funds differently.

The Committee discussed the options for reallocating the revenues and stated a desire to address this in future meetings.

*The Committee recessed at 8:18 pm.*

*The Committee reconvened at 8:22 pm.*

## 5. Travel Juneau

Liz Perry, Travel Juneau President, expressed appreciation for the Committee's consideration for funding and stated that Travel Juneau (TJ) is reaching all parts of the world in awareness shown on page 147 of the packet. Ms. Perry further stated that web traffic is increasing, and many young people are looking to Juneau as a place to visit and experience.

Ms. Perry presented an update on the goals TJ made in hotel occupancy, expressing that the goal of 65% occupancy is expected to be met, however it would have been higher if not for the closure of Centennial Hall limiting inflow of people to Juneau for conferences and events that would have been held at Centennial Hall.

Ms. Perry presented the FY24 budget for TJ found on pg. 148-150 of the packet. She expressed the challenge that she has had in staffing TJ this past year, stating that she is currently recruiting for three positions out of the seven that she needs. Part of this problem is losing her staff to higher paying positions and stressed for the Committee the need to raise wages to retain employees. She further stated that like many other organizations, cost of operations is increasing at a challenging rate.

McHugh Pierre, Travel Juneau Chair, stated that TJ is not requesting in an increase in funding without merit and is working to increase hotel vacancy rates by increased interaction with TJ's organization.

Responding to Committee questions, Ms. Perry stated that TJ does not maintain a fund balance like other organizations. However, there is a savings account maintained for a reserve of just over \$200,000.

In response to Committee questions, Ms. Perry stated that interest in Centennial Hall and Juneau itself is high, people are wanting destinations that are off the beaten path and Juneau is on that list. Centennial Hall is being booked several years out and the desire is rising with bookings being made into 2026.

**Motion: by Assemblymember Hughes-Skandijs to adopt the Travel Juneau Budget with an amendment to reduce the Hotel-Bed Tax allocation to Travel Juneau to \$1.1 million.**

**Objection: by Assemblymember Bryson for the purpose of stating that Travel Juneau has been successful in its destination marketing of Juneau, and this is not the time to slow down when success is being made. Assemblymember Hale also objected.**

Mr. Rogers stated that the Manager's budget for TJ is \$1.52 million, which is \$200,000 more than TJ is requesting.

Chair Triem asked what the options are for generating additional revenue outside of CBJ's Hotel-Bed Tax allocation. Ms. Perry responded by stating other forms of revenue come from various markets and ad operations as well as being given a portion of passenger fees.

Mr. Rogers answered Committee questions about the historical contributions to TJ.

### **Roll Call Vote**

**Ayes:** Weldon, Triem, Gladziszewski, Hughes-Skandijs

**Nayes:** Hale, Smith, Woll, Bryson

**Motion failed. Four (4) Ayes, Four (4) Nayes.**



**Motion: by Assemblymember Hale to adopt the Travel Juneau budget with an amendment to reduce the Hotel-Bed Tax allocation to \$1.2 million.**

**Motion passed by unanimous consent.**

**6. Updated Budget Summary and FY24 Decision List**

Chair Triem outlined the process for Assemblymembers to make motions to move community requests to the pending list for consideration later in the budget review process. Chair Triem emphasized that the decision for tonight is not to consider the amounts of the requests but just to decide if the request should be considered and put on the pending list.

**Motion: by Assemblymember Hughes-Skandijs to add the Sealaska Heritage Institute request of \$500,000 to the pending list.**

**Objection: by Mayor Weldon for the purpose of stating that they are asking for funds to remodel a space that was used to house CBJ staff until the purchase of the building in question.**

**Roll Call Vote**

**Ayes:** Hale, Woll, Hughes-Skandijs, Bryson

**Nays:** Weldon, Triem, Gladziszewski, Smith

**Motion failed. Four (4) Ayes, Four (4) Nays.**

**Motion: by Assemblymember Bryson to move the Alaska Committee request for \$336,000 to the pending list.**

**Motion passed by unanimous consent.**

**Motion: by Assemblymember Hale to move the Juneau Commission on Aging request to the pending list and asked for unanimous consent.**

**Motion passed by unanimous consent.**

**Motion: by Assemblymember Gladziszewski to move the request from the Juneau Arts and Humanities Council of \$17,700 to the pending list and asked for unanimous consent.**

**Objection: by Assemblymember Hughes-Skandijs.**

**Roll Call Vote:**

**Ayes:** Gladziszewski, Smith, Hale, Woll

**Nays:** Weldon, Triem, Hughes-Skandijs, Bryson

**Motion failed. Four (4) Ayes, Four (4) Nays.**

**Motion: by Assemblymember Smith to move the Juneau Nordic Ski Club request for \$25,000 to the pending list and asked for unanimous consent.**

**Motion passed by unanimous consent.**

**Motion:** by Assemblymember Hughes-Skandijs to move the request by the Juneau Economic Development Council (JEDC) for \$40,000 to the pending list.

**Objection:** by Assemblymember Smith for the purpose of an amendment.

**Amendment:** by Assemblymember Smith to change the amount from \$40,000 to \$70,000 to reflect JEDC's full request.

**Objection to Amendment:** by Assemblymember Hughes-Skandijs and Mayor Weldon for the purpose of keeping the amount of \$40,000.

**Roll Call Vote on Amendment:**

**Ayes:** Triem, Gladziszewski, Hale, Smith, Woll

**Nayes:** Weldon, Hughes-Skandijs, Bryson

**Amendment passed Five (5) Ayes, Three (3) Nayes.**

**Roll Call Vote on Amended Motion:**

**Ayes:** Triem, Gladziszewski, Hale, Smith, Woll, Hughes-Skandijs

**Nayes:** Weldon, Bryson

**Motion passed. Six (6) Ayes, Two (2) Nayes.**

**Motion:** by Mayor Weldon to move Southeast Alaska Independent Living's request for an elevator at Dimond Park Field House in the amount of \$1,020,000 to the pending list.

**Motion passes by unanimous consent.**

**Motion:** by Assemblymember Hale to move the request for Alaska Heat Smart for \$235,094 to the pending list and asked for unanimous consent.

**Objection:** by Assemblymember Hughes Skandijs.

**Roll Call Vote:**

**Ayes:** Weldon, Gladziszewski, Hale, Smith, Woll, Bryson

**Nayes:** Triem, Hughes-Skandijs

**Motion passed. Six (6) Ayes, Two (2) Nayes.**

**Motion:** by Assemblymember Smith to move the Juneau Housing First Collaborative Phase III request for \$1.4 million to the pending list.

**Objection:** by Hughes-Skandijs for the purpose of learning more about the project timing needs. Assemblymember Hughes-Skandijs removed her objection.

**Motion passes by unanimous consent.**

**Motion:** by Assemblymember Woll to move the Downtown Business Association's request of \$75,000 to the pending list.

**Objection:** by Chair Triem, stating that the Assembly indicated this funding would be one-time instead of recurring in the last budget cycle.

**Roll Call Vote:**

**Ayes:** Gladyszewski, Hale, Smith, Woll

**Nayes:** Weldon, Triem, Hughes-Skandijs, Bryson

**Motion failed. Four (4) Ayes, Four (4) Nayes.**

The Committee discussed the motions to move community requests to the pending list at this meeting and what those decisions mean for the potential funding for the requesting organizations.

Assemblymember Woll stated concern that if the Downtown Business Association loses this funding, they may not be able to continue as an organization.

**Motion:** by Assemblymember Hale for immediate reconsideration of the three no votes for moving community funding requests to the pending list.

**Roll Call Vote:**

**Ayes:** Hale, Smith, Woll, Hughs-Skandjis

**Nayes:** Weldon, Triem, Gladyszewski, Bryson

**Motion failed. Four (4) Ayes, Four (4) Nayes.**

The Committee discussed and clarified that there is possibility for new requests from the community to come to the Committee for consideration.

Mr. Rogers stated that the only received request that currently has not been discussed by the Committee is the request by the Rock Dump.

**7. Info Only: AFC Budget Calendar**

This item was provided for information only.

**F. SUPPLEMENTAL MATERIALS**

**8. Docks & Harbors FY Budget Presentation – Updated**

This item was an updated version of the presentation in Agenda Topic #2.

**9. April 19, 2023, Minutes – Corrected**

This item was included as a correction of the original minutes from April 19, 2023.

**G. NEXT MEETING DATE**

May 3, 2023

**H. ADJOURNMENT**

*The meeting was adjourned at 9:37 pm*

ADA accommodations available upon request: Please contact the Clerk's office 36 hours prior to any meeting so arrangements can be made for closed captioning or sign language interpreter services depending on the meeting format. The Clerk's office telephone number is 586-5278, TDD 586-5351, e-mail: [city.clerk@juneau.org](mailto:city.clerk@juneau.org).

# MEMORANDUM



**DATE:** April 28, 2023

**TO:** Assembly Finance Committee

**FROM:** Jeff Rogers, Finance Director

**SUBJECT:** Update on FY24 Revenue Forecast

155 Municipal Way  
Juneau, AK 99801  
Phone: (907) 586-5215  
Fax: (907) 586-0358

Quarterly filings for locally collected sales taxes are due to the CBJ Sales Tax Office by Monday, May 1. Those returns take several days of administrative processing, and the quarterly results will not be available for the May 3 Assembly Finance Committee meeting. The Finance Department will provide the AFC with the most recent sales tax data available from the preceding fiscal quarter at the May 10 committee meeting.

However, CBJ has received filings from Remote Sales Tax for the months of January and February, and those returns are significantly below estimates. January's return was \$269,000 and February's return was \$242,000; totaling \$511,000 versus a forecast of \$545,000—which is an underperformance of approximately 6% relative to the forecast. These winter months are cyclically low months, and the 2023 revenues do exceed the same months in 2022. That notwithstanding, these weaker-than-forecast months may be the earliest possible indication that Juneau resident spending is starting to weaken due to high rates of inflation and stagnant wages. It is likely that remotely ordered goods tend to more *discretionary* than essential—so a weakening in Remote Sales Tax revenue could be the canary in the coal-mine that Juneau residents are doing less discretionary spending because essentials are costing them more due to inflation.

The FY24 Proposed Budget forecasts \$4.0 million of Remote Sales Tax. If these weak months indicate some softening in the spending capacity of Juneau residents, then that forecast could be too high. Perhaps more importantly, if this data indicates local spending weakness, there could be risk that the forecast for locally collected Sales Tax is also too high. Or conversely, you might conclude that the weakening of Remote Sales Tax revenue could yield an increase in locally collected sales tax because residents are probably buying more of their essential goods here locally in Juneau.

The Finance Department will provide additional revenue updates at the May 10 and May 17 meetings, but I wanted to be as forthcoming as possible about the apparent weakness of the Remote Sales Tax collections and its possible implication for overall Sales Tax collections in FY24.

# Requests for Outside of Cap Funding

<b>Request for Funding</b> Subject to CBJ Assembly approval	<b>FY 2023 Revised Budget</b>	<b>FY 2024 Budget</b>	<b>+/-</b>
General School Operations	\$ 28,491,200	\$ 30,775,800	\$ 2,284,600
<b>Requests Outside the Cap</b>			
<b>K-12 Programs</b>			
High School Activities	1,200,000	1,200,000	-
Middle School Activities	105,000	105,000	-
Transportation	150,000	250,000	100,000
Food Service	75,000	75,000	-
<i>Total K-12 Programs</i>	<u>1,530,000</u>	<u>1,630,000</u>	<u>100,000</u>
<b>Other Programs</b>			
Kinder Ready	450,000	450,000	-
Community Schools	95,000	195,000	100,000
Learn to Swim	50,000	50,000	-
RALLY	150,000	250,000	100,000
<i>Total Other Programs</i>	<u>745,000</u>	<u>945,000</u>	<u>200,000</u>
<b>Total Requests Outside the Cap</b>	<u>2,275,000</u>	<u>2,575,000</u>	<u>300,000</u>
<b>Total Requests for Funding</b>	<u><b>\$ 30,766,200</b></u>	<u><b>\$ 33,350,800</b></u>	<u><b>\$ 2,584,600</b></u>

*Values rounded to the nearest hundred.*

Presented by: The Manager  
Introduced: April 5, 2023  
Drafted by: Finance

**ORDINANCE OF THE CITY AND BOROUGH OF JUNEAU, ALASKA**

Serial No. 2023-15

**An Ordinance Appropriating Funds from the Treasury  
for FY24 School District Operations**

Section 1. Classification. This ordinance is a non-code ordinance.

Section 2. Estimated Funding Sources. The following amounts are the estimated funding sources for the City and Borough of Juneau School District, for the fiscal year beginning July 1, 2023, and ending June 30, 2024. It is anticipated that these estimated funding sources will meet the appropriations set forth in Section 3 of this ordinance.

**ESTIMATED REVENUE:**

State Support	56,591,000
Federal Support	2,405,000
User Fees, Permits, and Donations	2,539,200
Student Activities Fundraising	1,350,000
<b>Total Revenue</b>	<b>62,885,200</b>

**TRANSFERS IN:**

General Governmental Fund School District Support:	
Operations	30,775,800
Special Revenue	2,275,000
<b>Total Transfers In</b>	<b>33,050,800</b>

Fund Balance Decrease	<b>381,000</b>
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<b>Total Estimated Funding Sources</b>	<b>\$ 96,317,000</b>
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Section 3. Appropriation. The following amounts are hereby appropriated for the fiscal year beginning July 1, 2023, and ending June 30, 2024.

**APPROPRIATION:**

General Operations	75,221,700
Special Revenue	21,095,300

<b>Total Appropriations</b>	<b>\$ 96,317,000</b>
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Section 4. Effective Date. This ordinance shall be effective immediately upon adoption.

Adopted this \_\_ day of \_\_\_\_\_, 2023.

\_\_\_\_\_  
Beth A. Weldon, Mayor

Attest:

\_\_\_\_\_  
Elizabeth J. McEwen, Municipal Clerk





**TO:** Rorie Watt, City Manager  
**FROM:** George Schaaf, Parks & Recreation Director  
**CC:** Katie Koester, Engineering & Public Works Director  
**DATE:** April 28, 2023  
**RE:** Dimond Park Field House Capital Needs

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You requested information regarding the capital improvement needs for the Dimond Park Field House over the next 10 years. The Field House was completed in 2008. Prior to acquiring the facility in 2021, Parks & Recreation engaged PDC Engineers to assess the condition of the facility's mechanical systems and artificial turf. Staff from CBJ Facilities Maintenance also assessed the building's structural components (including the roof) and found no issues that are likely to require correction before 2030.

**Elevator (\$1.02 million)**

The Field House offers the only indoor track that is open to the public. The track is located above the artificial turf field and is not accessible by people with disabilities because the building is not equipped with an elevator. Adding an elevator to the Field House has been included in the Department's 6-Year CIP since CBJ acquired the building. Based on previous estimates, our FY24 CIP request was \$450,000.

In April 2023, CBJ engaged Jensen, Yorba, & Wahl Architects and HMS, Inc. to develop a rough order of magnitude (ROM) estimate for the project. This construction estimate of \$702,621 includes a 37.78% contingency consisting of escalation (2.78%), market risk (5%), and unforeseen requirements (30%). Based on this information, the Engineering & Public Works Department puts total CBJ project costs at \$1,020,000.

**Turf Replacement (\$400k to \$700k)**

Parks & Recreation completed all tasks recommended by PDC in 2020 except ASTM F1936 / ASTM F355 shock absorption tests, which require specialized equipment and personnel not available in Juneau. According to PDC, the useable life of indoor turf systems is 10 to 15 years, which means the turf may require replacement soon. A large dip has also developed in the middle of the field, which would be corrected when the turf is replaced. The estimated cost to replace the turf in 2020 was \$400,000. Considering inflation and CBJ overhead, total project costs today are probably about \$700,000. This item should be included in the Department's 6-Year CIP, but was omitted in its FY2024 request.

**Mechanical Systems (Optional)**

Parks & Recreation implemented all of the short- and intermediate-term tasks recommended by PDC. The long-term (5-10 years) recommendations include several options to improve efficiency (i.e. air source heat pumps, relief air fan, and heat recovery ventilation unit), but are not critical to ongoing operations. The total estimated cost of these long-term improvements in 2020 was \$250,000.



April 12, 2023

Re: Funding for Dimond Park Fieldhouse Elevator

**Dear Mayor Weldon, Deputy Mayor Gladziszewski, Finance Chair Triem, and Assembly Members,**

The Capital Improvement Program (CIP) list contains a request of \$450K for an elevator in the Dimond Park Field House (DPFH). On April 6, 2023, CBJ Engineering estimated the actual price at \$1,020,000. I am writing to implore you to use your fund balance to fully fund this project. Why? Two reasons: CBJ appears to be noncompliant with the Americans with Disabilities Act (ADA) and it's simply the right thing to do.

A little background. The ADA includes both architectural and programmatic requirements. The DPFH was originally granted an architectural exemption for an elevator based on the definition of the 2nd floor as a mezzanine as long as there was nothing above the ground floor beyond the track. Given there is also a meeting space above the ground floor, the mezzanine exemption, in our opinion, is questionable. That said, what is absolutely not questionable is the ADA requirement for equal program access. As CBJ has no other public indoor track, ADA access to the indoor track is required. It has been countered that the UAS Recreation Center includes an indoor track. While that is true, the UAS Recreation Center is not available to the general public, rather the facility is only available to students and 'members'. UAS defines members as individuals who earned a degree from UAS. If you are not a member or student, you must be accompanied by one. Clearly the UAS Recreation Center does not meet CBJ's obligation to provide equal programmatic access.

This is not a new problem. SAIL has been advocating for an elevator in the DPFH since 2011. The nonprofit that owned the building placed the responsibility to add an elevator on CBJ as the land owner. CBJ placed the responsibility on the building owner. Now that CBJ owns both the building and the property, there is no question as to who is the responsible party.

Regardless of the ADA, adding an elevator at the DPFH is the right thing to do. A grandmother called SAIL in tears because she could not climb the stairs to watch her granddaughter compete in Girls on Run. A young woman who experiences a physical

disability called to voice her frustration as she could not join her friends for socialization and exercise at the DPFH because she could not physically climb the stairs. I've witnessed mothers precariously carrying toddlers up the stairs because there is no elevator for their stroller. Given Juneau's rainy weather and winter darkness, an accessible indoor track is all the more important.

The SAIL Accessibility Specialist, Bridget Thomson, and I recently met CBJ Park and Recreation Director George Schaaf and architect Wayne Jensen at the DPFH. Wayne was the original architect on the project. Together, along with some of George's staff, we located a workable location for an elevator. Parks & Recreation and CBJ Engineering also retained HMS, Inc. to develop the preliminary construction cost estimate reflected in this request.

In closing, on behalf of the hundreds of individuals who can't climb the stairs at the Dimond Park Fieldhouse—or do so precariously—and their families and friends, SAIL urges your approval to tap the existing fund balance to remedy this long standing inequity and potential liability.

Should you have questions or if I can be of further assistance, please do not hesitate to contact me.

Respectfully,



Joan O'Keefe  
Executive Director

Cc City Manager Rorie Watt, Finance Director Jeff Rogers



# Dimond Park Field House Elevator

City and Borough of Juneau Assembly  
Meeting • 05/03/2023



# Dimond Park Field House



View of the field from the upper level track.

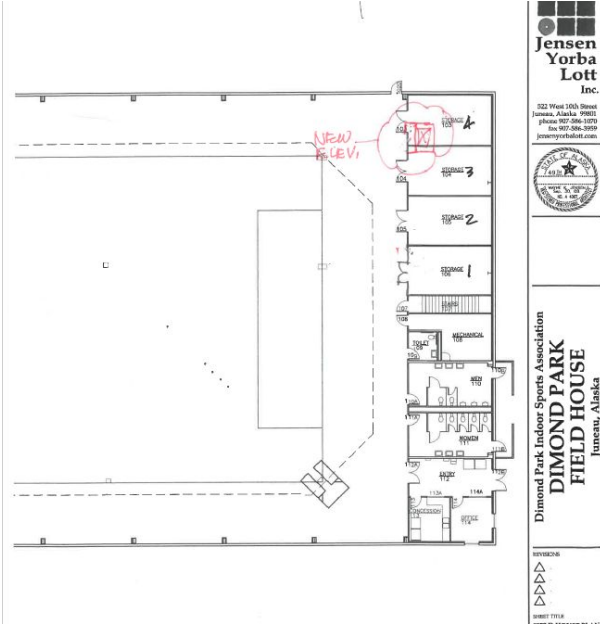


View of the track from the mezzanine.

6,717

Track users from April 2022 - 2023

# Proposed Elevator



Proposed location for the elevator



Proposed elevator stops on the mezzanine (green) and the track (lime green).



**CBJ Engineering Estimate: \$1,020,000**

## **Why a funding priority?**

- **CBJ owns both the land and the bldg.**
- **The Dimond Park Field House is not compliant with the Americans with Disabilities Act (ADA) and...**
  - **It's the right thing to do!**

**Thank you!**  
**Questions?**



**From:** Emily Kane <dremilykane@gmail.com>  
**Sent:** Friday, March 24, 2023 1:55 PM  
**To:** Borough Assembly <BoroughAssembly@juneau.gov>  
**Cc:** Jeff Rogers <Jeff.Rogers@juneau.gov>; Michelle Hale <Michelle.Hale@juneau.gov>; Michele Elfers <Michele.Elfers@juneau.gov>  
**Subject:** Request for FY 2024 funds

Dear CBJ Finance

The Juneau Commission on Aging would like to request \$15,000 for the upcoming fiscal year in order to move some of our projects forward. We remain focused on getting ADA/FHA language into the CBJ Building code, as well as working with local partners (SREC, SERRC) to develop new healthcare workers, in particular to serve elders. We are also poised to roll out discrete projects per the 2020 Senior Needs Survey and upcoming “Listening Session” in May to increase elders’ access to outdoor recreational and social opportunities. For this last category we will partner with Parks and Rec and likely dedicate our budget to prompting or adding to projects Parks and Rec already have in the works. That is to say it is almost certain the \$15,000 requested will stay “in house” with CBJ.

Thank you for your consideration.

Sincerely

Emily Kane

Chair, JCOA

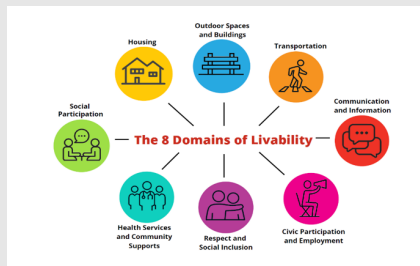
Deb Craig

Treasurer, JCOA

Be well!

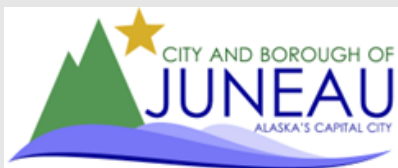
[www.DrEmilyKane.com](http://www.DrEmilyKane.com)

# You are invited to share Age Friendly Input!



Join the AARP AK Juneau Community Action Team and Juneau Commission on Aging at one of our "Listening Sessions" on Juneau as an Age Friendly/Livable Community.

Share your thoughts on what makes Juneau inclusive for seniors and community members of all ages and abilities and ways to improve Age Friendly inclusivity and Livability.



Tuesday, May 9th - Downtown Library  
Tuesday, May 16th - Valley Library  
Tuesday, May 23rd - Douglas Library  
All Sessions are 4:30 pm - 6 pm



THIS IS TO CERTIFY THAT THE

# Borough of Juneau, Alaska

has committed to becoming more age-friendly under the criteria established by AARP and has been accepted as a member of

## The AARP Network of Age-Friendly States and Communities

THIS CERTIFICATION IS VALID UNTIL

December 19, 2024

**Nancy A. LeMond, Chief Advocacy and Engagement Officer** COMMUNITY,  
STATE AND NATIONAL AFFAIRS, AARP | WASHINGTON, D.C.

The AARP Network of Age-Friendly States and Communities,  
a program of the AARP Livable Communities initiative,  
is an independent affiliate of the World Health Organization Global Network  
for Age-Friendly Cities and Communities.®



**Age-Friendly Communities  
Are Livable for  
People of All Ages**  
[aarp.org/livable](http://aarp.org/livable)



Beth Weldon  
Mayor, Borough of Juneau  
155 S. Seward St.  
Juneau AK 99801

December 19, 2022

Dear Mayor Weldon,

Congratulations to the Borough of Juneau, Alaska for becoming the 734<sup>th</sup> community to enroll in the **AARP Network of Age-Friendly States and Communities**.

The AARP age-friendly network encourages states, counties, cities, towns and rural areas to prepare for the rapid aging of our nation’s population. The network encourages elected officials and local leaders to focus on and strengthen the features and services that help to make communities livable for residents of all ages, from the cradle through retirement.

Launched in April 2012, the AARP Network of Age-Friendly States and Communities is an organizational affiliate of the World Health Organization Global Network for Age-Friendly Cities and Communities, a program launched in 2006. Through the age-friendly program, AARP helps participating communities to become more livable and age-friendly by creating safer and more walkable streets, needed housing and transportation options, better access to key services, and opportunities for residents to participate in community activities.

The AARP Network of Age-Friendly States and Communities provides a structured process that guides change and serves as a catalyst to educate, encourage, promote and recognize improvements that benefit residents of all ages and life stages. Enrollment in the network provides member communities with the resources to become more age-friendly by tapping into national and global research, planning models and best practices.

For additional information and support as you move through the age-friendly process, please visit [AARP.org/AgeFriendly](http://AARP.org/AgeFriendly) and/or contact Bill Armbruster, AARP Livable Communities Senior Advisor, by email at [warmbruster@aarp.org](mailto:warmbruster@aarp.org) or by telephone at 585-729-1850.

Thank you for being among the nation’s local leaders who have committed to improving their community for people of all ages. We look forward to working with you and welcome the Borough of Juneau to the AARP Network of Age-Friendly States and Communities.

**Nancy A. LeaMond**  
AARP  
Chief Advocacy and Engagement Officer  
Executive Vice President, Community, State and National Affairs  
Washington, D.C.

**AARP Livable Communities** WEBSITE: [AARP.org/Livable](http://AARP.org/Livable)  
EMAIL: [Livable@AARP.org](mailto:Livable@AARP.org) | FREE E-NEWSLETTER: [AARP.org/LivableSubscribe](http://AARP.org/LivableSubscribe)



**JUNEAU HOUSING FIRST COLLABORATIVE**

dba **THE GLORY HALL**

8715 Teal St. Juneau, AK 99801  
(907) 586.4159 info@feedjuneau.org

April 24, 2023

RE: Juneau Housing First Collaborative/Forget-Me-Not-Manor/Phase III

Dear Mr. Manager, Madame Mayor, and Assembly Members,

Thank you for taking the time to read this letter. We understand that there are many requests before you and that the resources our community can allocate to projects are limited. However, this project is extremely important.

**Juneau Housing First Collaborative aims to develop Phase III of the Forget-Me-Not-Manor facility, adding 28 more units of housing to the existing building. Our plan is to begin construction in the Spring of 2024. The units will be identical to the existing units and three will be used for the Juneau Medical Respite Program. The total cost of the project is 5.3 million dollars. Our request to the Assembly is 1.4 million dollars.**

This project is of critical importance to our community. Juneau's housing crisis is a well-known fact. 28 more units is the maximum number the site can support. Building an attachment to the existing project, rather than finding another site, contributes to operational efficiencies, as well as reduces the project cost as the land is already secured.

Just as with Phases I and II, funding from the City and Borough of Juneau (CBJ) is critical to our ability to secure other funds for the project. Senator Murkowski submitted a 2.5 million request for a congressionally designated appropriation for this project with response expected in the fall. CBJ's early funding support will allow us to secure funds from the Rasmuson Foundation, Alaska Mental Health Trust Authority, and other private foundations, which require a certain amount of revenue to be secured before grants are considered. We would expect that the appropriation from CBJ would be made contingent on our ability to secure other funds and would include the same appropriation language as was provided in CBJ funding agreements for Housing First Phases I and II.

JHFC sought funds for the project through the Juneau Affordable Housing Trust Fund last year but we were not successful. This project needs to move forward. The site is secured and is properly zoned. Since 2017, our organization has secured over 12 million dollars of funding from outside of CBJ and developed 64 units of

permanent supportive housing and 58 emergency shelter spaces. We have been able to accomplish this due in a large part to CBJ's early financial support. Timing is again of the essence. CBJ's financial support makes a crucial difference by enabling us to reach out to other funders now and to start building in the Spring of 2024. The sooner we build, the faster we move out of the existing housing crisis. Delaying this project for several years will increase the cost of the project, reduce the likelihood of success, and will maintain the housing crisis status quo.

A five-year evaluation study completed by the University of Alaska, and included with this request, documents a 40% reduction in police contacts, 55% reduction in Emergency Room services, 52% reduction in ambulance transport, and a significant improvement in well-being, sense of safety, decrease in substance use among Forget-Me-Not-Manor tenants. There is a great need for the project now based on the number of people experiencing homelessness, our housing crisis, and the simple fact that housing first works and is of great benefit to our entire community.

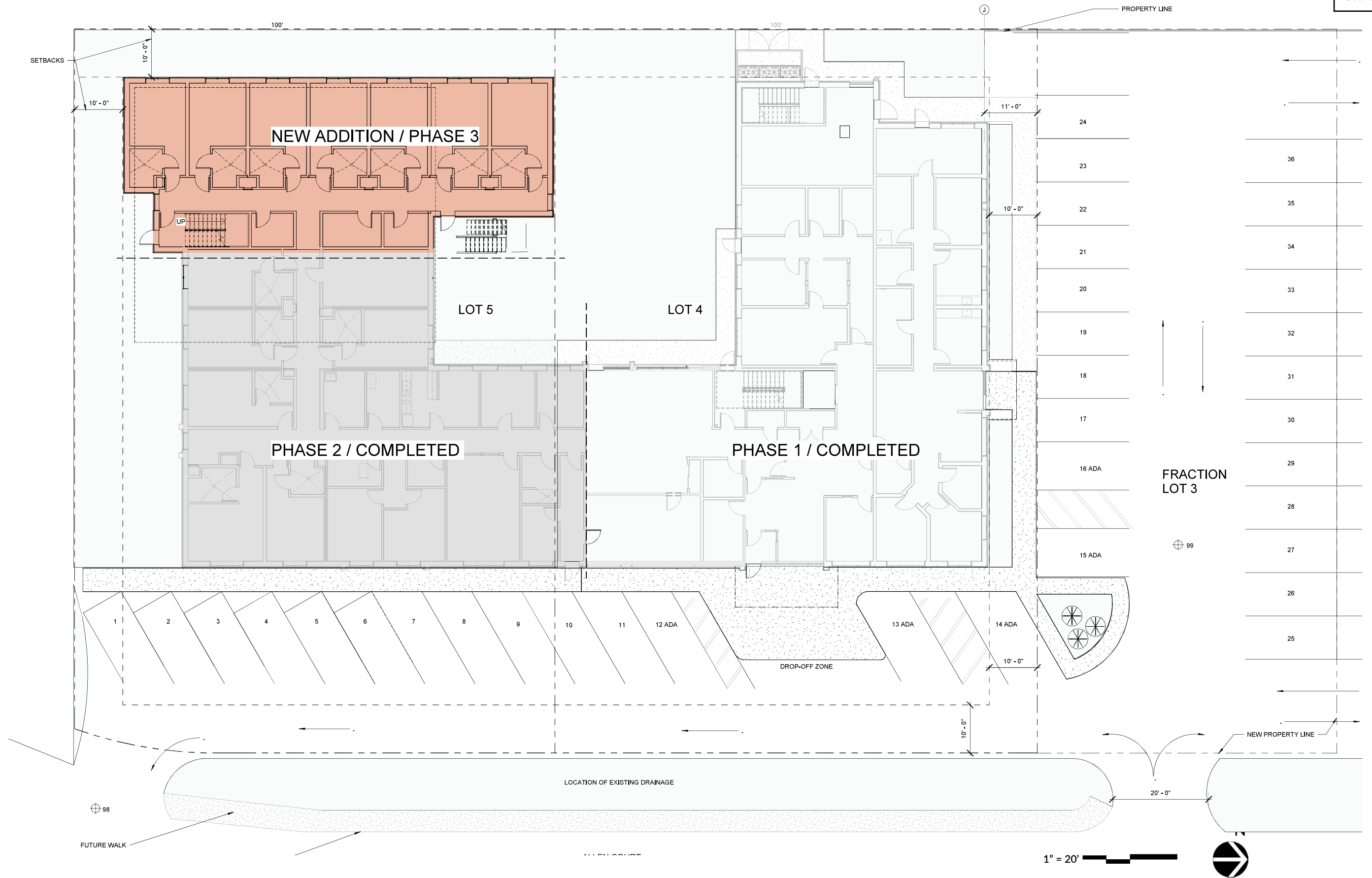
Please let me know if I can provide any further information

Sincerely,

*Mariya Lovishchuk*

Mariya Lovishchuk  
Executive Director



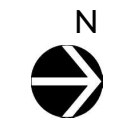




4,667SF / FLOOR

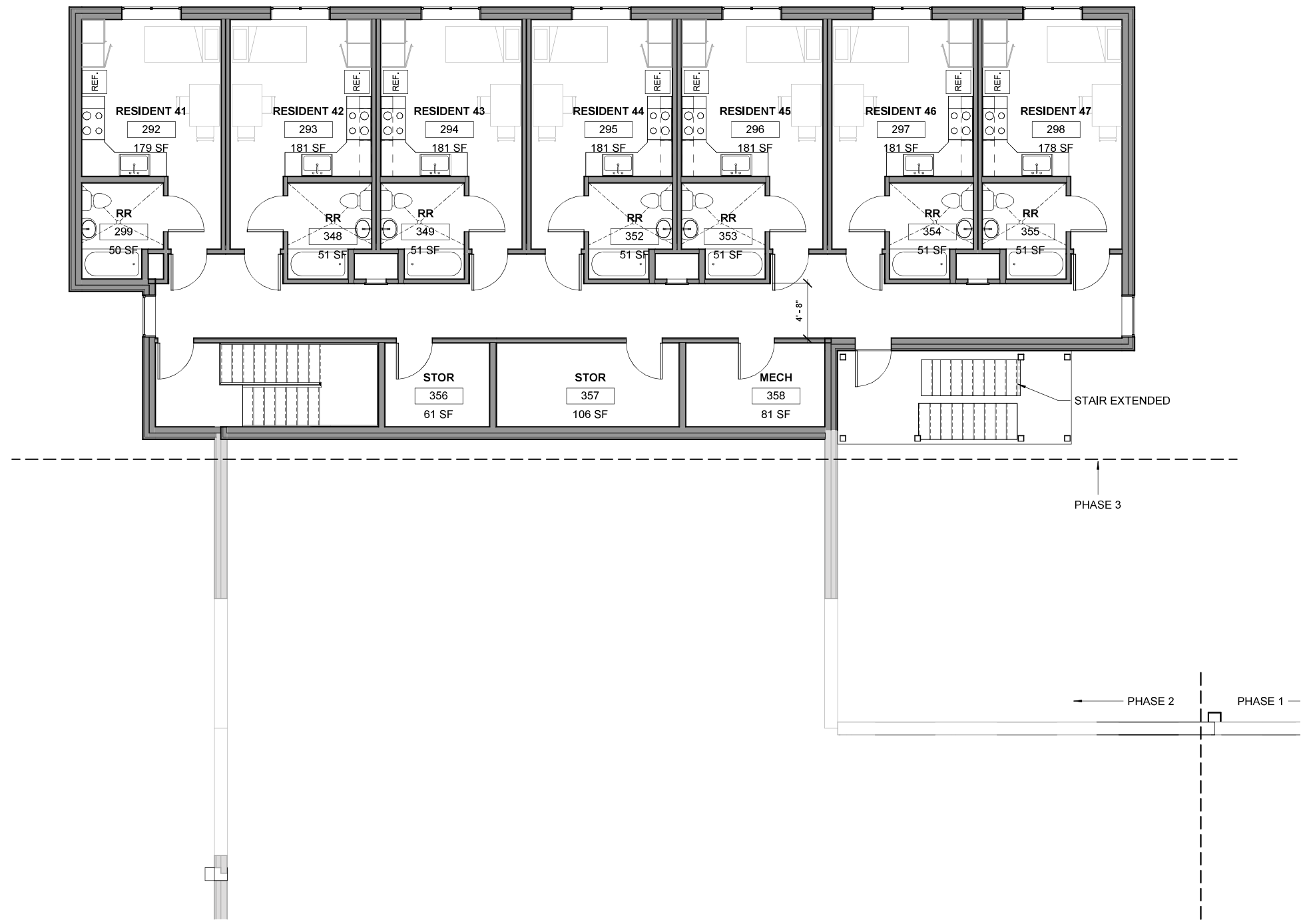
HRV

3/32" = 1'

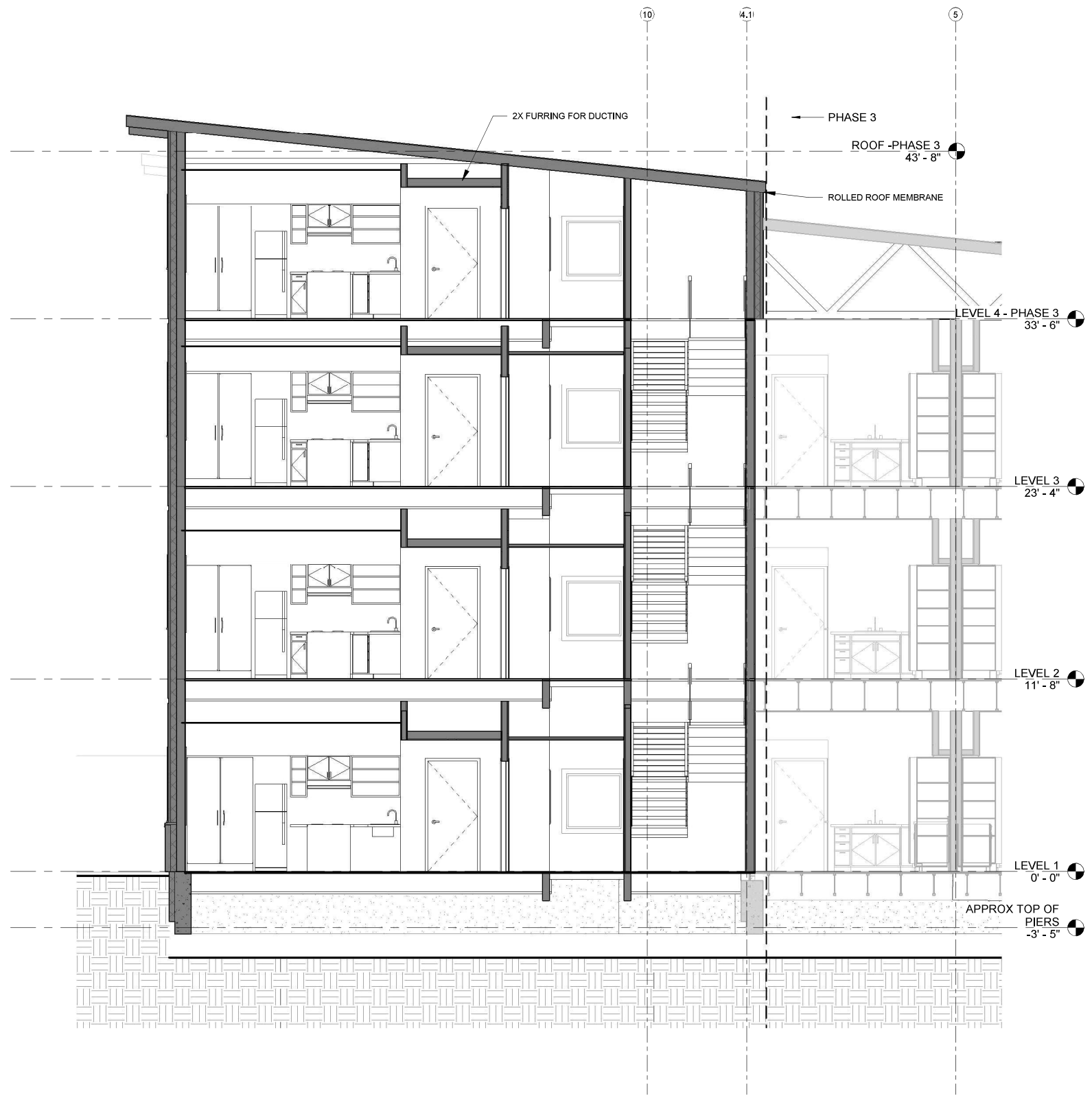


# FLOOR 1 PLAN





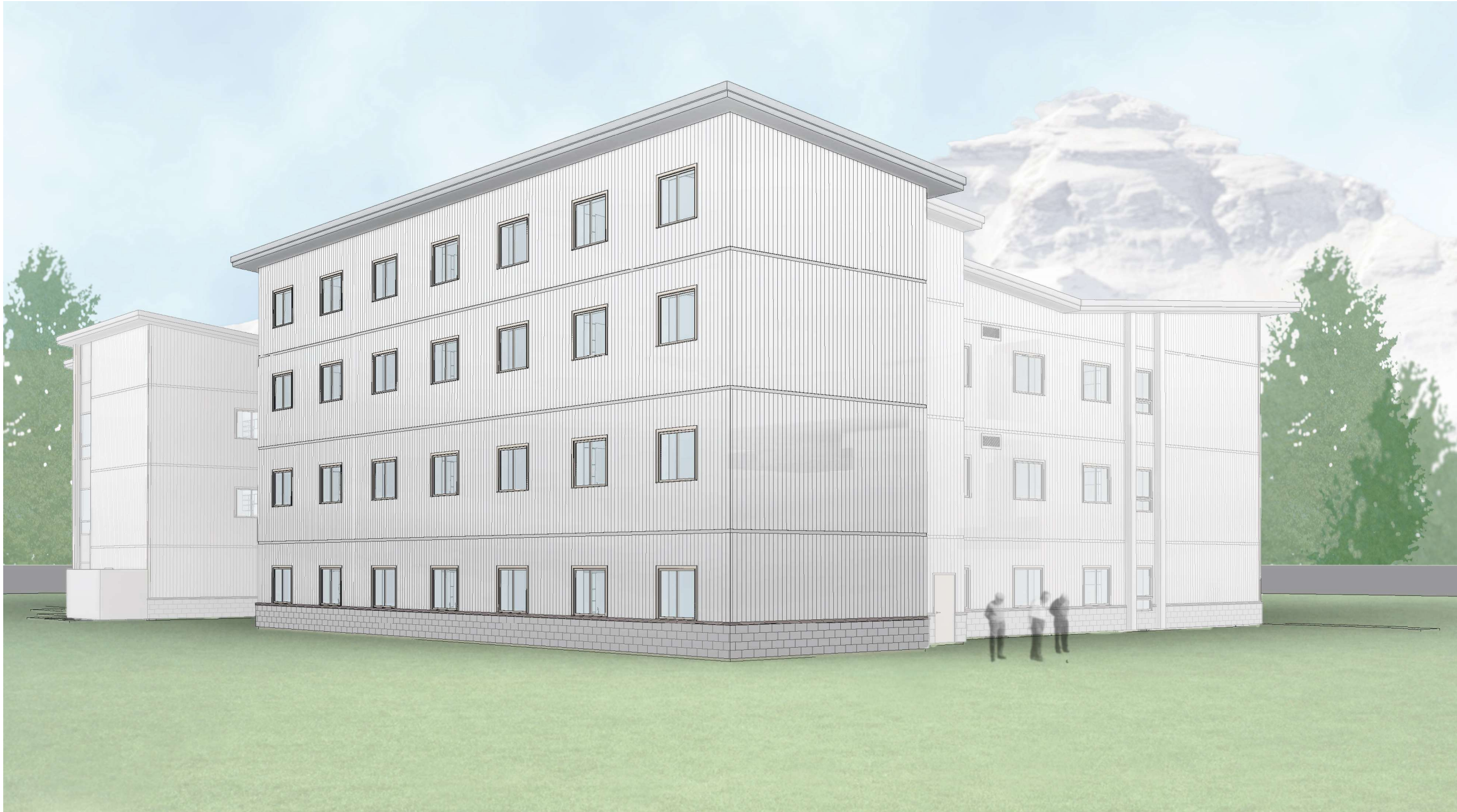
# FLOOR 4 PLAN



1/8" = 1'

# SECTION





# Forget-Me-Not Manor

## Final Outcomes Report & Five Year Data Summary

AUTHORED BY:



Heidi Brocious, MSW, Ph.D.  
*Professor of Social Work, University of Alaska Anchorage*

Morgan Erisman, MSW, MPH *Adjunct Professor at*  
*UAA School of Social Work & Director of Forget-Me-Not Manor*

LaVerne Xilegg Demientieff, LSMW, Ph.D.  
*Professor of Social Work, University of Alaska Fairbanks*



## INTRODUCTION

This report summarizes five years of data collection on two distinct phases of tenants at Juneau’s Forget-Me-Not Manor (FMNM), a housing first facility in Juneau, Alaska.

In this study, pre and post-data were collected on Phase One, which included tenants who moved into FMNM in the fall and winter of 2017. Initially, 35 individuals in Phase One agreed to participate and provide time one data, however, due to death and other transitions, only 27 were available to provide 6-month post data, and 25 were available to provide 1-year post data.

Phase Two reflects the expansion of FMNM in the summer of 2020, which allowed for the addition of 32 beds to the FMNM facility. Of this second group, 32 individuals participated in initial data collection (From the time period 9/10/20-2/23/21), with 23 available to provide 6-month post data, and 18 available to provide 1-year post data.

Data collected for each phase included general demographics, the use of services such as ambulance transports, contacts with the police department, and emergency room visits, along with self-reported alcohol consumption data, and health and safety data. These are the data points that will be summarized in detail in this report across individual phases and for the total across both phases.

General descriptive statistics were used for analysis. Additionally, all pre-post data were analyzed using the Wilcoxon signed-rank test, a non-parametric statistical test for related samples. This test was chosen over a parametric version because of the relatively small sample sizes in this study, and the abnormal data distribution that often comes with smaller samples.

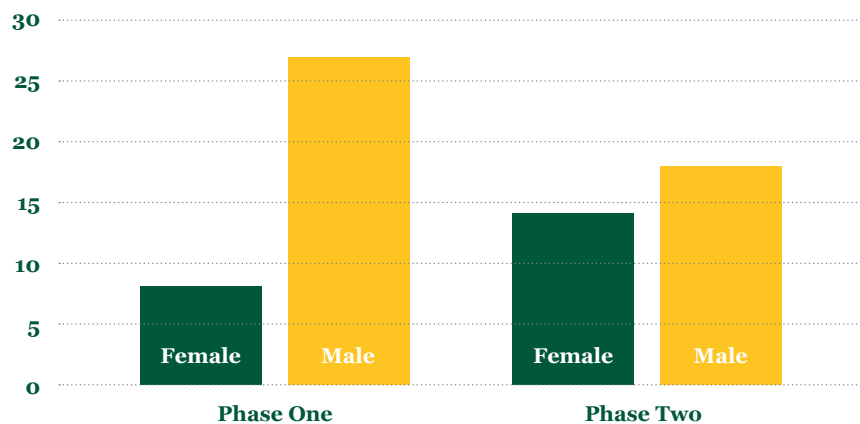
## DEMOGRAPHICS

All demographics are reported based on the number of participants first enrolled in the study (n=67). Later comparative data points represent slightly different sample sizes due to study attrition.

### Gender

Sixty-seven total individuals agreed to participate between Phase One and Phase Two. Twenty-two females, 45 males, and 0 other gender categories were reported. In Phase One (n=35), 8 participants reported as female (22.9%), and 27 reported as male (77.1%). In Phase Two (n=32), 14 participants reported as female (43.8%), and 18 reported as male (56.3%).

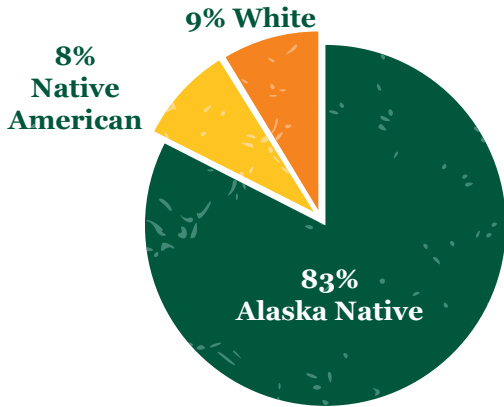
Table 1. Tenant Gender



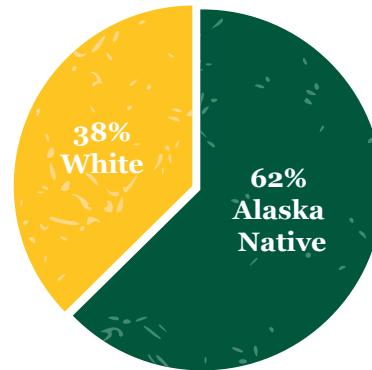
**Race**

Of the 67 original participants, 49 reported that they are Alaska Native (73.1%), three self-reported to be Native American (4.5%), and 15 reported being white (22.4%). In Phase One (n=35), 29 (82.9%) participants reported to be Alaska Native, 3 (8.6%) reported as Native American, and 3 (8.6%) reported as white. In Phase Two (n=32), 20 (62.5%) reported as Alaska Native and 12 (37.5%) self-reported as white.

*Table 2. Phase One by Race*



*Table 3. Phase Two by Race*



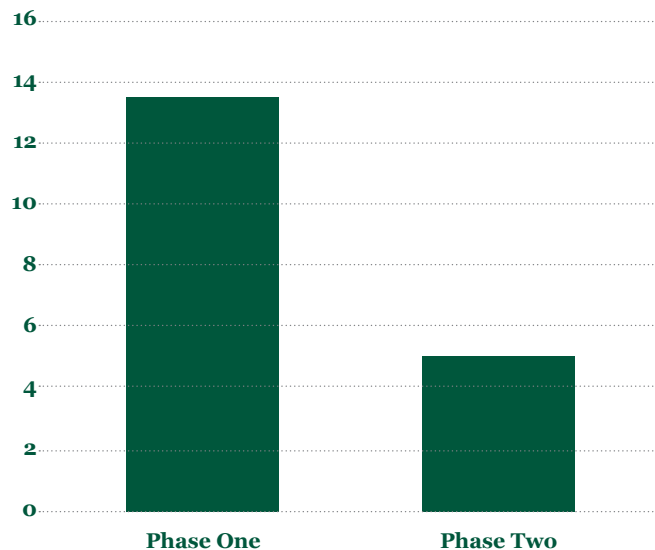
**Age**

The mean age of the 67 total initial participants was 52.54 years old, and the median was 55 years old. In Phase One (n=35) the mean age was 54.54 and the median was 58. In Phase Two (n=32) the mean age was 50.34 and the median was 52.

**Length of Time Spent Homeless**

On average, the total group (n=67) spent 9.84 years (118.08 months) homeless prior to moving into FMNM (median = 7.8 years). In Phase One (n=35) the average was 13.5 years (162.69 months), with a median of 11 years (132 months) homeless prior to moving into FMNM. In Phase Two (n=32) the average was 5 years (60.26 months) with a median of 5.3 years (64 months) homeless prior to moving into FMNM.

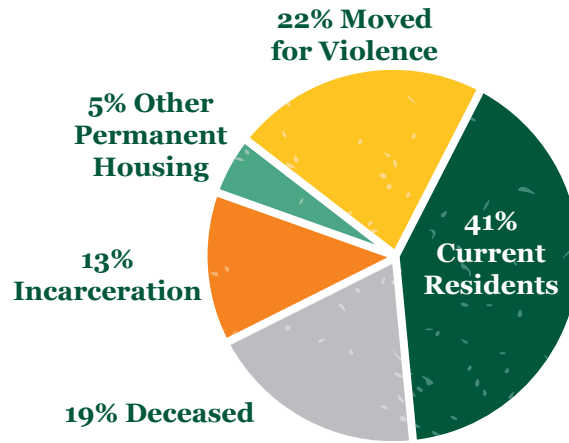
*Table 4. Years Homeless before Forget Me Not Manor*



### Disposition

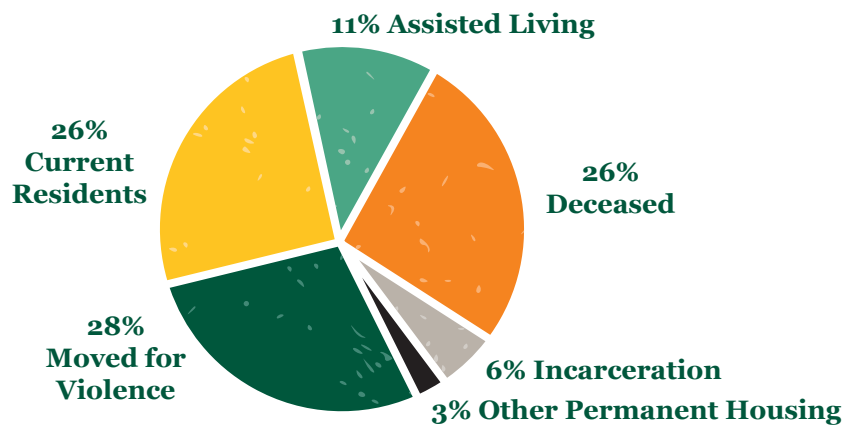
In an effort to understand tenant longevity and the issues that led people to leave FMNM over the last five years, reasons for departure were considered and then compared across groups. In the combined Phase One and Phase Two group, 26 (38.8%) are current residents. Across the two Phases, 12 (17.9%) of the original 67 study participants died while residing at FMNM. Four (6%) moved to assisted living, 14 (20.9%) were asked to leave or evicted for violent behavior, 8 (11.9%) were incarcerated, and 3 (4.5%) moved to alternate housing (i.e. their own apartment or permanently with family).

*Table 5. Disposition of All Study Participants Across both Phase One and Phase Two*



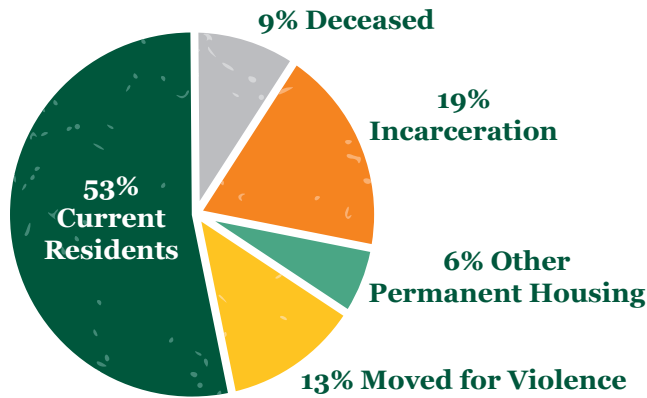
In Phase One, of the initial 35 residents participating in the study, 9 (25.7%) were deceased as of July 15, 2022. Four participants (11.4%) had moved to assisted living homes to better support their medical needs. Ten (28.6%) either voluntarily moved or were evicted by the program due to their violent behavior. Two (5.7%) residents were incarcerated and one (2.9%) had moved to other permanent housing like an apartment or with family. Nine (25.7%) continue to reside at the FMNM as of July 15, 2022, almost five years after their initial move-in in the fall/winter of 2017.

*Table 6. Disposition of Phase One Participants*



In Phase Two, of the initial 32 residents participating in the study, three, or 9.4% were deceased as of July 15, 2022. Four (12.5%) either voluntarily moved or were evicted by the program due to their violent behavior. Six (18.8%) residents were incarcerated and two (6.3%) had moved to other permanent housing (i.e. their own apartment or with family). Seventeen (53.1%) continue to reside at the FMNM as of July 15, 2022, almost 2 years since their initial move-in in the fall/winter of 2020.

Table 7. Disposition of Phase Two Participants



### Time in Housing

One of the indicators of a successful permanent supportive housing (PSH) program is the longevity of residents, as one of the main goals of PSH is stable long-term housing. As noted in earlier data, residents moved on from FMNM for various reasons, including unavoidable reasons such as death, the need for assisted living, or even for positive reasons such as establishing more independent permanent housing or reconnecting and moving in with family. Tenants also moved on for more negative reasons, including eviction, being asked to leave due to violent behavior, or incarceration.

Among the original 67 participants from both Phase One and Phase Two, the average length of tenancy was 1.82 years (663.27 days) and the median length of tenancy was 1.46 years (535 days). Keep in mind this includes the 41% of participants who are still living at FMNM and does not represent an average “end date” to housing. It is expected these averages will continue to grow.

In Phase One (n=35), the average length of tenancy was 2.4 years (874.74 days) and the median length of tenancy was 2.62 years (957 days). This is out of the approximately 4.5 years of possible tenancy.

In Phase Two (n=32), the average length of tenancy was 1.2 years (431.97 days) and the median length of tenancy was 1.33 years (485.50 days). This is out of the approximately 1.8 years of possible tenancy.

### VI-SPDAT Scores (n=50)

As a part of the intake process, most participants were assessed using a measure called the VI-SPDAT, a tool that has been historically used to identify the level of vulnerability & housing need the tenant may have, and to assist in prioritizing placement into PSH programs. For reference, a score of 0-3 typically leads to a recommendation for no housing intervention, a score of 4-7 supports a recommendation for Rapid Rehousing. People who score 8+ (for individuals) and 9+ (for families) are typically recommended to PSH programs.

Among the total 67 participants, the average VI score was 12.75 with a median score of 14. In Phase One (n=35) the average VI score was 13.17 with a median score of 14. In Phase Two (n=30), and the average VI score was 12.27 with a median score of 12 (two participants’ VI score is missing/not recorded).

These findings indicate that while Phase One was assessed to be slightly more vulnerable than Phase Two, both groups were well over the score of 8 which typically indicates appropriateness for PSH.

## PRE & POST EMERGENCY SERVICE USE

As occurred in the first phase of this study, data was collected from the local emergency room (Bartlett Regional), the local ambulance service (Capital City Fire & Rescue/CCFR), and the police (Juneau Police Department). Each participant gave permission for these entities to report the following: 1) Number of ER visits for any reason during the requested time frame; 2) Number of ambulance transports; and 3) Number of police officer contacts for any reason. The findings of this data are reported by Phase One, Phase Two, or combined groups, and compared in two time frames. First, each group’s use of these services was compared at 6 months pre-move to 6 months post-move in. Second, emergency service use for each group was compared one year before moving to one year after moving in.

### Statistically Significant Decreases in Police Contacts Across All Groups and Time Frames

Findings from this study show a statistically significant decrease in the number of police contacts from tenants in both Phase One, Phase Two, and the two groups combined. These decreases occur both at six months post housing as well as one-year post housing.

Data were collected (with participant consent) directly from the Juneau Police Department (JPD) about the number of times participants had contact with an officer for any reason. Table Eight displays actual contact numbers at 6 months and Table 9 documents pre/post contacts at one year for each Phase individually and combined.

Phase One participants (n= 27) had 667 total contacts with JPD in the six months before moving into FMNM. This number dropped to 231 contacts in the six months after gaining housing. On average, Phase One residents had 26.3 contacts per person before and eight contacts after, a statistically significant decrease (p=.017).

Phase Two participants had 268 police contacts in the six months prior to moving in and 195 contacts after gaining housing. On average, Phase Two residents had 11.7 contacts with the police in the 6 months prior to move in, and only 8.5 contacts in the 6th months after moving in, a statistically significant decrease.

Table 8a. Six Month Police Data

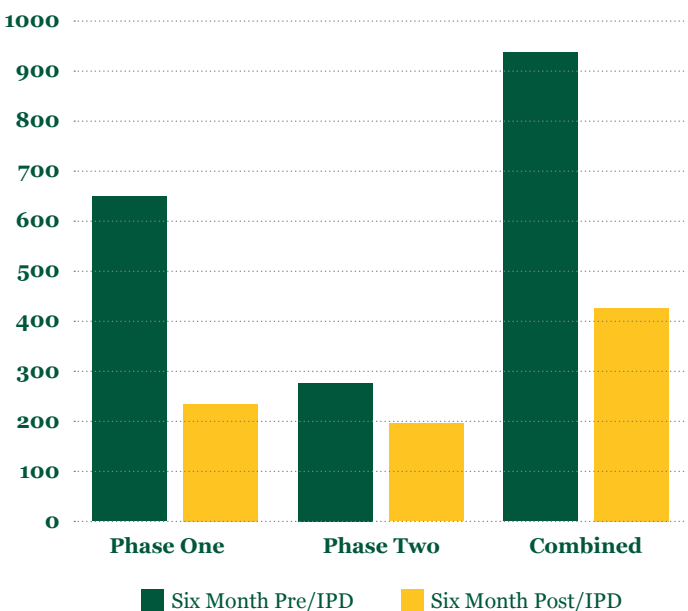


Table 8b. One Year Police Data

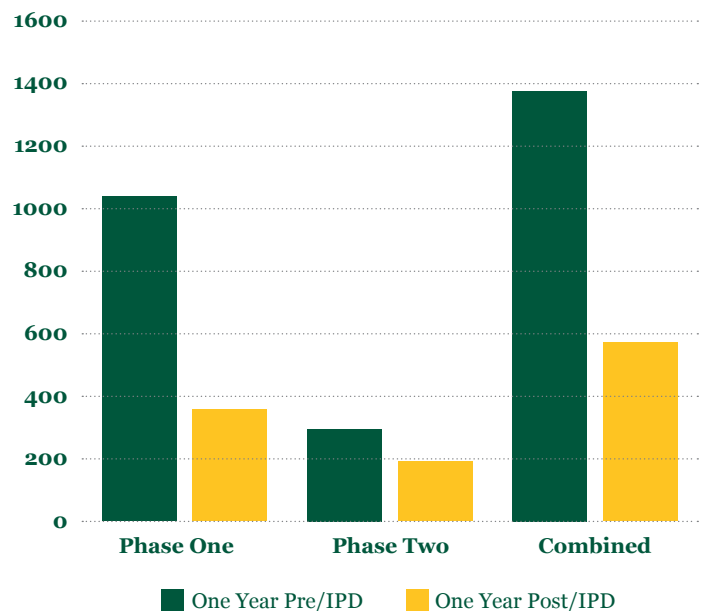


Table 9. Changes in Mean Police Department Contacts Across all Groups

	Mean Contacts Six months Pre	Mean Contacts Six Months Post	p value	Mean Contacts One Year Pre	Contacts One Year Post	p value
Phase 1 JPD	26.3	8	p = .017*	42	14.5	p=.039*
Phase 2 JPD	11.7	8.5	p = .011*	18	10.2	p = .023*
Phase 1 & 2 JPD	19.6	8.2	p < .001*	31.9	12.7	p < .001*

\* indicates a statistically significant difference in pre/post data

### Statistically Significant Decreases in Emergency Room Visits Across All Groups and Time Frames

Participants who agreed to be in the study gave permission for researchers to collect use data from the one local emergency department at Bartlett Regional Hospital in Juneau, Alaska. Data was collected on the number of visits to the ER, however, private medical data was not collected.

When considering the impact of FMNM on the emergency service use system, it is important to think both in averages and in total numbers. Tables 9 & 10 represent the actual numbers of visits to the emergency room. Table 9 highlights the changes in use in the six months prior to moving into FMNM for each Phase, and combined. In the study Phase One residents (n=26) visited the ER a total of 383 times in the six months leading up to housing. That number dropped to only 153 ER visits in the 6 months after moving into FMNM.

Phase Two residents (n=18) began with smaller use numbers, with a total of 72 ER visits before moving in. This number still dropped significantly to 37 visits to the ER in the first six months after moving in. While statistical significance is important to the community of Juneau, decreasing actual ER visits by 265 over a six-month period has real implications for resource savings for the emergency room.

Table 9. ER Visits Pre/Post Six Months All Groups

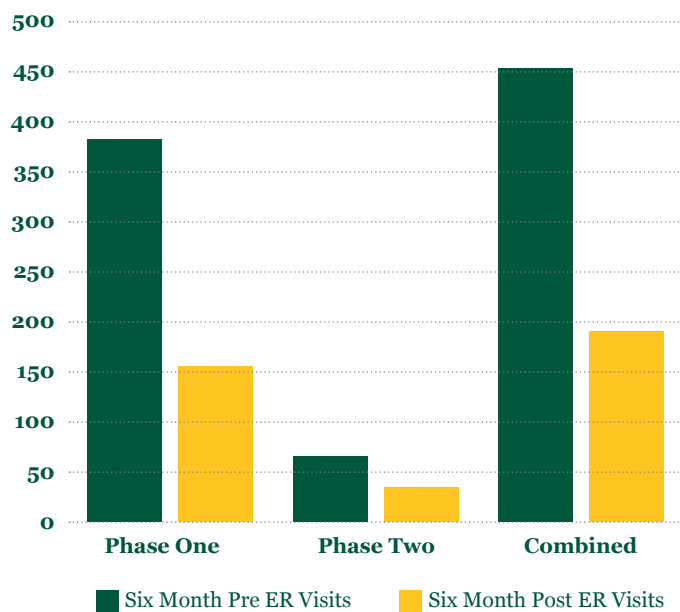
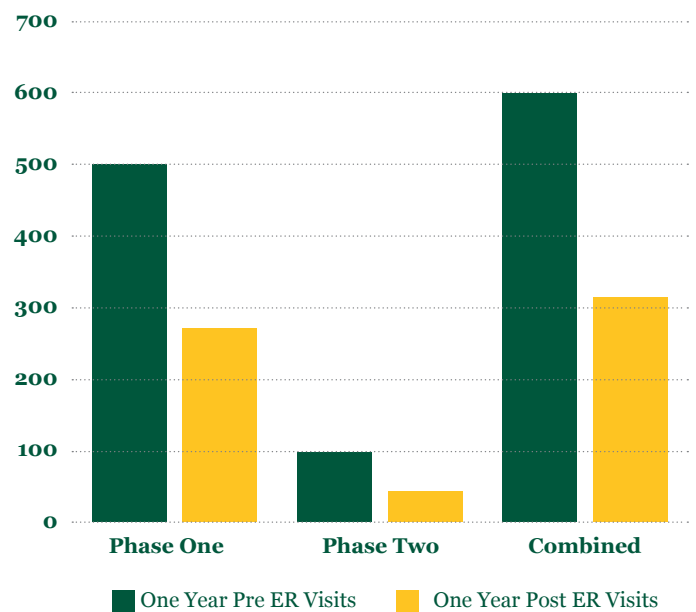


Table 10. ER Visits Pre/Post One Year All Groups



When ER data were analyzed using a Wilcoxon Signed Rank Test, decreases across all groups and all time frames were found to be statistically significant. In other words, both Phase One and Phase Two participants decreased their use of the ER in a significant way at both six months and one year.

Table 11. Changes in Mean ER Visits Across All Phases & Times.

	Mean ER Visits Six Months Pre	Mean ER Visits Six Months Post	p value	Mean ER Visits One Year Pre	Mean ER Visits One Year Post	p value
Phase 1 ER Visits	14.2	5.7	p=.017*	20.1	11.1	p=.039*
Phase 2 ER Visits	3.1	1.6*	p=.029*	5.2	2.9	p=.046*
Phase 1 & 2 ER Visits	9.1	3.8*	p=.002*	13.9	7.7	p=.05*

\* indicates a statistically significant difference in pre/post data

### Statistically Significant Decreases in Ambulance Transports in Some but Not all Groups

Transport data was collected from Capital City Fire and Rescue (CCFR) the only entity in Juneau, Alaska that provides ambulance transports. As with other data points, a drop in use data can be seen across all groups in all time periods. Comparing the six months before moving into FMNM to the six months after moving in, Phase One participants reduced the number of ambulance transports from 224 to 103. Phase Two participants also saw a decrease in use, but their numbers were much lower to begin with, with 33 ambulance transports in the six months prior to FMNM move-in, and 22 transports in the six months post.

Similarly, change is seen at one year, with Phase One participants requiring 224 ambulance rides in the year prior to moving in and 103 in the one-year following move-in. Phase Two residents went from 44 ambulance transports to 36 in one-year pre and post. Not all of these represent statistically significant decreases (see table 13). Again, given the amount of resources that go into just one ambulance transport, the decrease in the absolute number of transports translates to resource savings for the City of Juneau (See table 12 & 13).

Table 12. Ambulance Transports Pre/Post Six Months

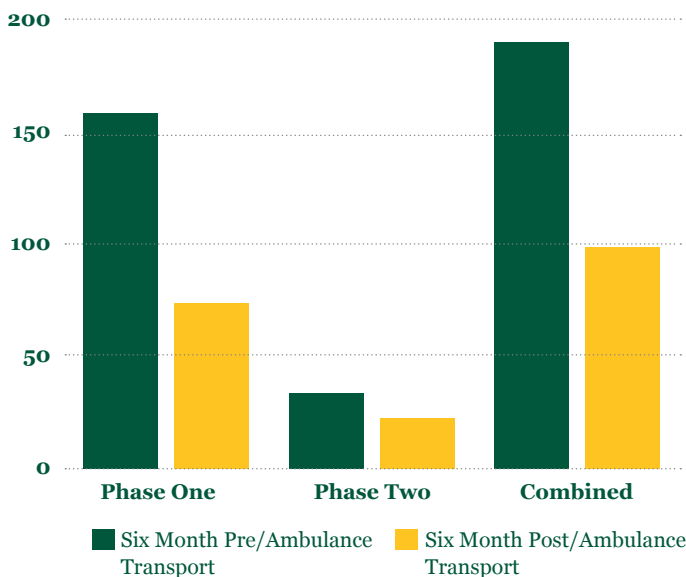


Table 13. Ambulance Transports Pre/Post One Year

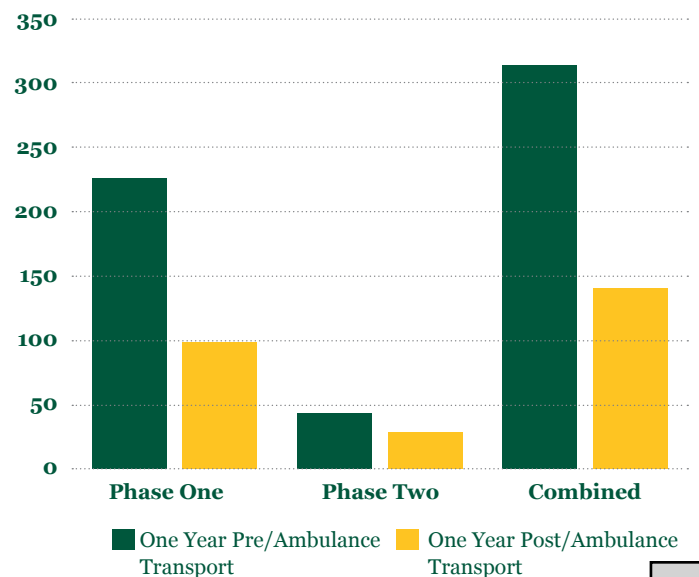


Table 14 highlights the mean number of transports by each phase at 6 months and 1 year and reports the statistical significance of these changes. Phase One participants had statistically significant decreases both at 6 months and one year. Phase Two participants did not demonstrate statistically significant changes in Ambulance use. When the two groups were combined the data was again statistically significant at both 6 months and one year.

Table 14. Changes in Mean Ambulance Transports Across All Phases & Time Frames

	Mean Ambulance Transports Six Months Pre	Mean Ambulance Visits Six Months Post	p value	Mean Ambulance Transports One Year Pre	Mean Ambulance Transports One Year Post	p value2
Phase 1 Ambulance Transports	5.8	2.8	p=.021*	9	4.1	p=.01*
Phase 2 Ambulance Transports	1.4	1	p=.363	2.4	2	p=.776
Phase 1 & 2 Ambulance Transports	3.8	2	p=.015*	6.2	3.2	p=.017*

\* indicates a statistically significant difference in pre/post data

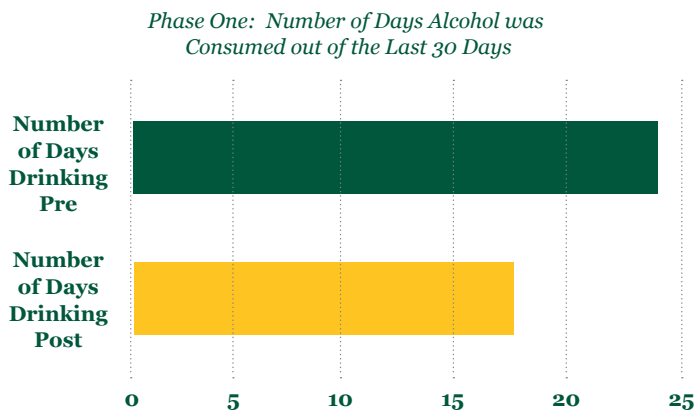
### CHANGES IN ALCOHOL, DRUG & TOBACCO USE

Self-reported alcohol use data was collected at moving in and two years for participants in Phase One. Similar data was collected on Phase Two participants at six months and one year. While a reduction in alcohol consumption is not the primary goal of Housing First or other harm reduction programs, it is interesting to look at the impact that housing plays in the overall wellness of the tenants, and this was explored through several data points including self-reported daily drinking and self-reported binge drinking.

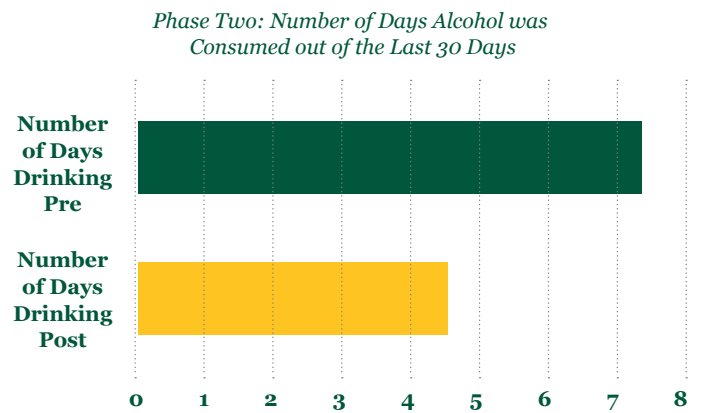
When asked “In the last 30 days, how many days did you consume alcohol?” participants self-reported perceived changes in their alcohol consumption. For tenants in Phase One, the number of days alcohol was consumed dropped from an average of 22.9 days per month to 17.4 days per month (see table 14). While this was not a statistically significant difference (p= .108) it is what some would argue as “approaching significance” particularly since this is a very small sample (n=18). Phase Two residents reported consuming at least one drink an average of 7.3 days at the time of move-in. At one year this number dropped to 4.6 days of alcohol consumption, although again, this was not statistically significant (p=.233) (See table 16).



*Table 15. Changes to Daily Drinking in Phase One Participants after 2 Years at FMNM.*



*Table 16. Changes to Daily Drinking in Phase Two after 1 Year at FMNM.*



### Binge Drinking

Similarly, participants were asked about their binge drinking. Specifically, they were asked to self-report the number of days in the last 30 where they consumed 4 or more alcoholic drinks. As in the daily alcohol consumption numbers, binge drinking is self-reported and data was collected from Phase One and Two when moving in, and collected again at two years for Phase One participants and at year one for Phase Two participants. Phase One members reported that on average, they drank 4 or more alcoholic beverages in one day on 18.5 days per month. Two years following move-in, participants reported binge drinking only 14.7 days per month. Again, this data was not statistically significant ( $p=.325$ ) but it is an observation of interest. Participants in Phase Two reported an average of 5.5 days of binge drinking prior to moving into FMNM, and at one-year post-move-in reported an average of 3.7 days of binge drinking. This is another finding that is “approaching significance” with a  $p$ -value  $=.058$  and a small sample size.

### Drug Use

Participants were asked about the frequency of daily drug use. In this survey, drug data was collected in general and included cannabis, methamphetamines, heroin, opioids, cocaine, etc. Anecdotally, participants who reported drug use were predominantly reporting cannabis use but not exclusively.

Participants of Phase One reported on average using drugs 8 days out of the last 30 at the point of move-in. This number increased slightly to 9.3 days two years after move-in, however, it is important to contextualize. First, this is not a statistically significant change ( $p=.813$ ) so it could be a reflection of no change. Another explanation, that many participants reported anecdotally, is that they have worked to replace their alcohol consumption with cannabis use, which many viewed as a harm reduction strategy, reporting that they felt their pain and anxiety were better when they replaced some alcohol use with cannabis use.

Similarly, participants in Phase Two reported a slight increase in average drug use at year one post-move-in. This group reported a mean number of days where they used drugs as 16.5 days prior to moving in, and 17.1 days one year after move-in. Again, this is not a statistically significant change ( $p=.893$ ) but may also highlight the transition from alcohol or “hard” drugs to cannabis use, as was frequently reported in the qualitative interviews.

### Tobacco Use

No substantial changes were noted in tobacco use in either group in their pre/post-self-reports. Phase One tenants reported smoking an average of 18.7 days prior to moving in, and 17.9 days two years after moving in. Phase Two reported smoking 16.2 days prior to moving in, and 16.1 days after a year of tenancy.

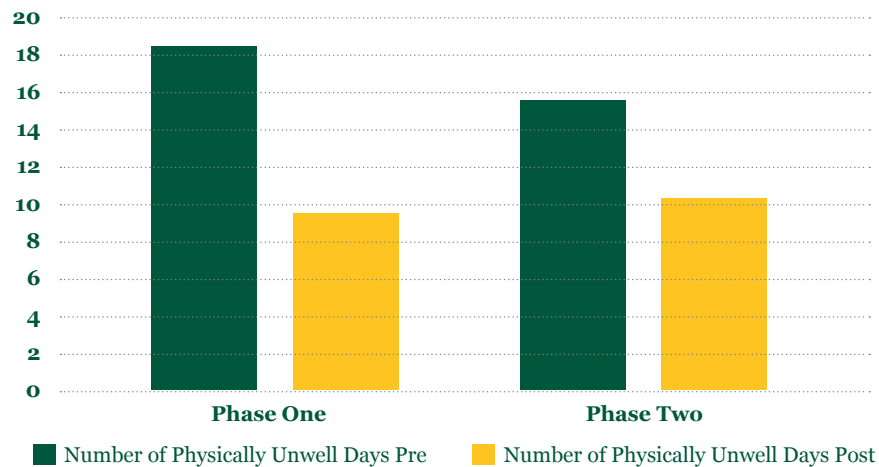
## TENANT WELL-BEING

Experiencing homelessness, especially long-term homelessness, is known to have a profound impact on individuals’ physical and mental health (Henwood, et al., 2018). To examine the impact that FMNM may have had on tenant well-being, participants were asked a series of questions about their physical & mental health, their sense of connection, safety, and isolation. Changes in these self-reported indicators are highlighted in this section.

### Self-Reported Physical Health

Participants in both groups were asked to assess their physical health both before moving in and after (2 years for Phase One participants, 1 year for Phase Two participants). In Phase One, statistically significant differences were reported. At the time they moved in, when asked “of the last 30 days, how many would you say your physical health was poor?” Phase One tenants reported an average of 18.4 days where they didn’t feel physically well prior to moving in. This number dropped in a statistically significant way ( $p=.006$ ) to 9.6 days per month two years post-move-in. Phase Two participants also reported a substantial drop in unwell days, with an average of 15.5 unwell days prior to moving in, and 10.4 days one year after move-in. This finding was not statistically significant ( $p=.098$ ) but could be considered “approaching significance”.

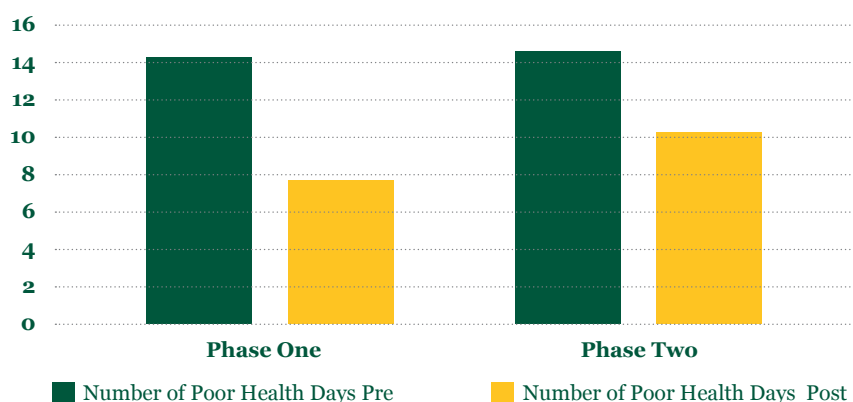
Table 17. Changes in Days Tenants Felt Physically Unwell Pre/Post



### Self Reported Mental Health

Similar to physical health, participants in both groups were asked to assess their mental health both before moving in and after (2 years for Phase One participants, 1 year for Phase Two participants). In both phases, there was a drop in the number of reported poor mental health days, however, the findings were only significant among Phase One participants. At move-in, Phase One tenants reported an average of 14.2 days where they felt their mental health was poor, compared to only 7.8 days of poor mental health reported after 2 years ( $p=.011$ ). In Phase Two, participants reported an average similar to Phase One participants -- 14.6 days but saw a decrease to an average of 10.2 days at one-year post move-in. This difference was not statistically significant ( $p=.22$ ), but it is important to note the data was assessed at only one year in Phase Two, while it was two years in Phase One, which could account for the difference along with the small sample size challenge discussed earlier in this report.

Table 18. Changes in Poor Mental Health Days Pre/Post



## CHANGES IN SAFETY, COMMUNITY & FAMILY CONNECTEDNESS, & GENERAL WELL-BEING

In general indicators of a sense of safety, community and family connectedness & general well-being improved, although not all changes were statistically significant. Specifically, participants were asked a series of questions on a 7-point Likert Scale, with higher numbers reflecting a more positive outlook in each respective category. Some of the most significant changes occurred across both groups in their sense of satisfaction with their housing, their sense of safety in their housing, and their lives in general. Tenants in Phase One demonstrated statistically significant increases in satisfaction with their friendships and their sense of spirituality. Phase Two participants also demonstrated modest increases in these domains, however, they were not statistically significant.

Table 19. Changes in Pre/Post Wellbeing Across Phase One and Two.

	Phase One Pre-Move In	Phase One Post-Move In	p value	Phase Two Pre-Move In	Phase Two Post-Move In	p value
Satisfaction with Life in General	3.5	5.7	p<.001*	3.9	4.6	p=.046*
Satisfaction with Housing	2.7	5.8	p<.001*	3.1	5.4	p=.005*
Satisfaction with Friendships	4.8	5.7	p=.02*	4.6	5.2	p=.098
Satisfaction with Family Situation	4	4.9	p=.112	4.5	4.9	p=.293
Sense of Spirituality	4.8	5.8	p=.003*	5.1	5.5	p=.301
Safety in Current Housing	3.1	5.8	p=.001*	3.6	5.3	p=.010*

\*indicates statistical significance

Note: Phase One post data was collected two years post-move-in. Phase Two Data was collected at one-year post move-in.

## QUALITATIVE FINDINGS

In addition to the pre/post tenancy data, a series of interviews were conducted with residents who had lived at FMNM for more than one year to find out how they felt housing had impacted their wellness. Fifteen participants, 10 males and 5 females (8 Phase One participants and 7 Phase Two participants) were interviewed individually for approximately 1.25 hours. The longest length of tenancy in the sample is almost 5 years, while the shortest was 1.5 years. The average length of time resided at FMNM of the 15 individuals is 3.2 years. These interviews were recorded, transcribed, and analyzed for common themes. Five themes were identified in the data including: 1) Residents think more about their future now, and have glimmers of hope; 2) Resident substance use has changed in both significant and in subtle ways; 3) Tenant’s are using preventative and routine health care now and their physical health has improved; 4) COVID has been hard on FMNM Residents; and 5) Residents continue to feel judgment by friends, family, providers, and the community in general. Each theme is described below with supporting quotes from participants.

### **Theme One: Residents think more about their future now and have glimmers of hope.**

One interesting finding from the transcripts is that FMNM residents talk more about their future. When participants were interviewed after moving in, there was very little future thinking or planning. This was a population whose energy was focused on meeting their basic needs for the day, sometimes even for the hour. There was no discussion of the future because survival in the present took all of their energy and resources - and they were exhausted from the chronic lack of sleep that came with being homeless. Now, a year or more after moving in, most of the interviewed participants describe excitement or pleasure along with future plans. For most, these plans were not tremendously long-term, but it appears clear that residents are much more future-facing than they were at move-in. Most of the interviewees expressed a cautious sense of hope such as this participant who stated:

*Knowing you’re facing something that’s challenging, it’s like climbing a mountain. You look up. I can do it, but I can’t do it all at once, and I have to catch my breath first. - FMNM Tenant*

Hope was expressed in many different arenas, including: a) Hope to restore passions or interests they once had; b) Hope to get and stay well; c) Hope to quit, cut back, or stay sober; d) Hope to gain employment; e) And hope for healing in their personal relationships.

### **Hope to restore the passions or interests they once had.**

Tenants discussed establishing new hobbies or getting back into things they used to enjoy. Many described going for hikes, sitting on the beach, doing art, or growing things in the garden as activities that have brought them pleasure since moving in. One resident excitedly described an adventure she had always wanted to experience, stating:

*I actually got a Christmas present where we - it was a whale watching tour coming up this spring for a friend and I. - FMNM Tenant*

### **Hope to get and stay well.**

Participants described the greatest degree of hope about their health. For many, they had been unable to adequately manage their health conditions while living on the street. Most are on long-term medications, and most reported not taking, or irregularly taking their daily medication while experiencing homelessness. Since FMNM, and especially with the support of staff who assist with medication management and reminders, participants report a much higher degree of hope for a healthier future. For example, one stated:

*When I first moved into this building, I had found out that I had congestive heart failure and my heart was only working [with an ejection fraction] in the teens. Now, it’s a couple of years ago I found out I’m at 55 percent and that makes me feel empowered. Like very proud and happy that I did that. I mean I had to make the step of taking those meds every day, but the building had helped me get to those appointments and keep up with them and keep*

*going from a day to day basis. But for me, I felt very empowered because I was able to – I was on my way out. - FMNM Tenant*

**Hope to quit, cut back, or stay sober.**

Some long-term residents have completely quit substance use, however, all discussed cutting back, or attempts to quit with increased hopefulness about the possibility of success. When asked if he had any future goals around alcohol use, one participant stated:

*Well, eventually, I'm gonna stop. I just don't know when it's gonna happen. I know that I have – I do have the power to do it; it's just one of those things that are easier said than done. - FMNM Tenant*

When another tenant was asked how he felt about his alcohol use he shared the following:

*I think it's a hell of a lot better than what it used to be. Because it used to be vodka, whiskey, and beer. Now I'm just down to beer. And I'm also cautioning that off. I'm feeling good about it. - FMNM Tenant*

Still another tenant, talking about his desire to change his alcohol use, stated:

*Alcohol is still part of my life, but the dramatic part has been – it's nowhere near as bad as it used to be, that's the only way I could put it. Before, the law was always involved. Now, it's like I can actually say hi to those guys and not bat an eye. - FMNM Tenant*

**Hope to gain employment.**

An increasing number of long-term tenants talked about seeking employment as a major goal they are working on. This is frequently complicated by the health challenges many tenants have, but the desire to work, to do something productive, and to improve their income, is foremost on many minds. One tenant described plans to get back to work as a welder in the following way:

*I actually am – I got a – I think I got a scholarship to go back to welding school. I'm hoping that doesn't – so on the 10th, the school opens. On the 19th is the first class. So they're going to assess my welding skills and decide whether I start on the 19th or on the 8th. Six-week course and I either take the intermediate or the advanced class. - FMNM Tenant*

**Hope for healing in their personal relationships.**

Many participants discussed their reconnection, or attempts at reconnection with family since moving into FMNM. For some, this reconnection has been unequivocally joyful, with adult children, siblings, aunts and uncles visiting them at their new residence, or residents finally having the stability to reach out and re-establish lines of communication that had been broken. For others, it has also meant working to heal relationships that had become broken due to their substance use. The three tenant quotes below highlight this newfound sense of hope for connection and reconnection:

*[I used to think] like if I'm not hurting anybody and I'm just drinking, sitting here drinking, if I'm not going to jail, and I'm not physically hurting somebody, I'm all right. But no, I was hurting my kids, their eyes and their ears, they were watching me give up. I showed my children how to give up. Now I gotta show them how to get back up and I think that's the only way I can fix it. - FMNM Tenant*

*I don't know, for the longest time I thought that getting back and starting to deal with family and everything was my number one thing. But the only thing that I really want to do right now is work on myself and fix the relationship I hope that I can have with my children. I hope that I can fix what I did, I don't know. - FMNM Tenant*

*All I know is I just want my children to fucking see me as a better person. I want them to understand. My oldest son, my mother and my oldest son went out drinking, they died drinking. They left this earth drinking. I want my – the rest of my boys to understand this does not overpower you, this does not make you and this, this is not a curse just because your grandma passed away from it or your brother has passed away from it. This does not claim you, that’s it. That’s the only thing that I’m here to – it’s the only way I want to be heard right now, that’s all. - FMNM Tenant*

In summary, in the year or more since move in, many tenants continue to recover in a variety of ways; recovery in the sense of substance use reduction or abstinence, recovering parts of their health, their relationships, their ability to plan and think about what is next, and to in general have some hope for the future.

***Theme Two: Resident substance use change has changed in both significant and in subtle ways.***

When tenants were first interviewed at move in, they were skeptical of the HF model that allowed them to have their own housing without first having to become sober. Those early interviews reflected a sense of mistrust, and participants were sometimes defensive and challenging to those who asked questions about their substance use. Now, after an average of 3 years at FMNM, participants have confidence that they are not going to lose their housing because of their substance use. These current interviews reflected a great deal of internal motivation to change their substance use patterns. Several described reasons why they personally wanted to quit or cut back. For many this was tied to fears about their health, but for some it was also about now having hope about their future, which gives them a reason to quit or cut back. Participants describe many paths to reducing their substance use; some quit cold turkey, others scaled back on the amount or type of substances used, while still others cut back naturally because of they didn’t need it for warmth (alcohol) or for safety (meth, often taken to stay awake all night when homeless) or as a means to get admitted to the sleep off center for the night. The following quotes illustrate this changing relationship with substances:

*I still drink every now and then. I think the longest I’ve ever stayed sober was around nine months. But compared to five years ago when I first stepped into this building, I was drinking every day around the clock, so.... - FMNM Tenant*

*Everyone says I’m doing great. They say I look great, look much healthier, I’m more clear-headed. - FMNM Tenant*

*How do I feel about drinking these days? I feel like it’s part of my life that is over now. - FMNM Tenant*

*Well, like I said, I gave up the vodka and the whiskey, so that was recovery enough for me right there. I know I need to – well, I’m probably never gonna be completely nonalcoholic, but I think that I did a damn good job... cutting myself back to a couple beers. I think that I did a damn good job on that. - FMNM Tenant*

One tenant described the cycle he had been living in prior to Housing First, where he kept up his alcohol intake in part to have a place to rest at the Sleep Off Center. He stated:

*And so, you got one homeless shelter you can’t be drinking and you got one where you have to be drunk enough [sleep off]. Well, guess what the drunks are going to do? So we would do that – we were totally abusing the system. They knew it; we knew it. And so, now all three of us live at Housing First. And actually, all three of us stopped drinking. - FMNM Tenant*

Still another describes how he has managed his use with his own system. He states:

*And alcohol, it does provide a huge level of comfort. Like, tell you the truth, I have two beers sitting up in my fridge. And they would provide me with physical release, but I know that if I went up and drank those beers that I would just fall right back off the wagon and it would be over. So I'm not going to. I just keep them up there for if I have friends that want some. And I've been doing good with that. They've just been sitting up there. - FMNM Tenant*

One final point tenants discussed was that it can be both supportive and difficult to live in recovery at FMNM; some describe feeling more isolated because they don't "party" with other residents like they have in the past. Others describe the frustration and sometimes temptation with being offered substances. However they describe creative coping strategies to deal with this. One tenant talked about having a small group that he got sober with, and notes that the three of them try to just hang out with each other. Another resident, who states she used to use substances regularly with many of the tenants, describes her response now to people who offer her substances is to say "I don't use any more, remember dumbass!?", and after enough times her fellow tenants came to respect that and don't offer. Tenants noted that this challenge is mostly outweighed by the support and assistance they get from FMNM staff, but it can be a struggle.

***Theme Three: Tenant's are using preventative and routine health care now and their physical health has improved.***

Tenant's overall report that their physical health is better now than before moving into FMNM. In general drinking has decreased, eating more regularly has gotten better, health care needs are being met, medications are taken more regularly, and even though health and wellness progress is relative tenant's are slowly starting to see and feel the benefits. Many tenant's expressed gratitude to have regular appointments with physicians, as well as gratitude for the support from FMNM staff to help remember appointments and for transportation to and from appointments. Even though their physical health has improved and continues to improve, it is significant to note that almost all participants shared that they still live with physical pain in their bodies, as well as emotional pain, highlighting the complexity of their overall health status and needs. They discussed dealing with back pain, foot pain, joint pain, teeth pain, stomach pain, pain of grief from seeing friends die regularly, grief of loss of family and being disconnected from family, the pain of trauma, the pain of falling, which has been frequent for many participants, causing trips to the ER for head injuries, etc. Pain is in the forefront of what participants are managing daily and often takes precedence over things like eating, relationships, housing upkeep, and other basic daily living practices. Even though they deal with pain and that inhibits them in certain ways they are still striving toward healing and getting well. One participant shares their experience with pain and loss, stating:

*I mean I was very close to death when I first moved in this building. So working on that made me feel empowered. But I had lost my son two years ago to alcoholism and he has the same heart problem I have. And that – so I'm dealing with grief and sadness and loss and feeling like I wasn't a good mother. So stuff like that, but still I'm able to talk to someone here about it. - FMNM Tenant*

One tenant shared the impact of illness on their physical and mental abilities:

*Right now it's been a physical thing, mostly my health. I figure once I get my health back in line, it felt like this infection really clouded a lot of the things that – I guess when they say you're sick, you're sick. It affected a lot of my mental stuff, too, I guess. That was where I felt like I was clouded quite a bit, and once that infection started disappearing, so did the cloud. - FMNM Tenant*

Part of Permanent Supportive Housing, is the supportive piece. Tenants expressed that FMNM is meeting those needs in regard to their physical health and follow-up care. When individuals feel physically healthier they are able to do more things and continue to grow in other areas of their lives. Tenants expressed feeling stronger, going to physical therapy, and switching from using a walker to a cane, and below are other examples of what keep them going:

**Probably the healthiest I've been in probably ten years.**

*I don't know, yeah. I watched my mom give up with her drinking because my dad had passed away. And then I started falling, not realizing it. And I remember looking back at praying and wanting to believe that he's there and that there's some sort of reason why all these things are happening. So, yeah. I think I lost what I was trying to say. - FMNM Tenant*

*I'm having a hard time, my – I was using a walker last year and every once in a while, I use a cane now. It's not good, my mobility isn't any good. I'm falling apart and I feel helpless to it. So I think I got two different kinds of arthritis, so. Got to say though, without this building I wouldn't have been doing any of that. - FMNM Tenant*

*Philosophy it could always be worse. I mean I'm pretty happy with the Housing First and I'm not homeless. So like right now even though with the blood infection and stuff and all the medical shit, I'm still pretty happy that I have a place to live and I'm not out there in the cold. So that's what's kind of keeping me going and plus I don't want to lose my place. So yeah. - FMNM Tenant*

*I feel like – yeah, it's probably the best in a while, I feel that my depression it needs to be addressed and anxiety and anger needs to be addressed. I'm going to be working on that, that's for sure. - FMNM Tenant*

*Yeah. I mean, I do feel physically good today. Mostly wired on coffee. The most positive thing that I can think of, here, is the staff members, you know, and they're very good at, you know, keeping me on top of my medicine. Every single one of the staff members here, they're all awesome. - FMNM Tenant*

**They do everything for me.**

*You know, there's not anything that I don't do for myself, except for wipe my own ass. They do all my meds. They put them in bubble packs. My mail. My, they set up my appointments. They take me to my appointments. They go with me in my appointments, to sit down with my doctor, because I don't understand what the fuck he's saying all the time. So I always have staff go in with me. That there, and taking me to the store and helping me with my PFD and helping me with my mom's death certificate and all her stuff. I mean, they don't do, they do so much. - FMNM Tenant*

*Interviewee: It's so much. And I can't thank them enough. On Christmas, they got me a huge ass wagon, because I wanted my own wagon to bring up to the third floor with my groceries and stuff. They got me my own wagon, and they got me pillows. I was just teasing with the underwear, but they got me underwear. They're great. I can't let anybody sit there and say anything bad about them. No way. - FMNM Tenant*

*Everything. I love this whole idea, it's like you've gotta go through a front desk to get to the room. It felt like everybody was rummaging through my bunk down there at the Glory Hole, and now I'm behind a locked door. I feel a lot safer, to be honest. The staff is always, they do the best they can, they do a really good job, considering some of the things we have to go through, they do the best they can. I'm very grateful they're here. They've been a big help, too. - FMNM Tenant*

Many tenants see a reason to get well and when asked what they would want if things could be different, tenant's often expressed a wish to have family, raise children, be a better parent, have a spouse, and many feel they are right where they want to be even though things are not perfect.



**Theme Four: COVID has negatively impacted us too.**

COVID affected everyone, tenants included. While globally the COVID pandemic affected people in various ways, tenants expressed their COVID impacts:

*Well, before the COVID, I used to go to – we used to have drumming every Friday. But since the COVID restrictions came, we haven't been doing that for quite a while now. But I did enjoy it. - FMNM Tenant*

Building activities, community dinners, games, and other activities were no longer available for tenants to restrict the spread of COVID. This left tenants with no activities in the building as well as in the community.

*No, I don't do that no more after the COVID came and hit. Seemed like we lost all the culture ever since the COVID hit. There's no more 40-day parties or pay-out parties no more. It would cause a pandemic, and people get sick. It's just not worth it to have a pay-out party and a 40-day party. I don't want anybody else getting killed from it, dying from it. - FMNM Tenant*

The loss of activities and things to do leaves more down time for drinking, using, and/or isolation which has been expressed previously. Tenants also experience a loss in connection to staff, activities, and things they would do before and could no longer. Along with the restrictions on activities there was also fear of catching COVID. After years of feeling unsafe while being homeless, tenants now expressed feeling unsafe because of COVID.

*"I don't know, I feel like as much as I've been fighting to survive to like live again to whatever you call is normal, I don't know what the fuck normal is anymore after all I've been through. With this COVID thing going on, I'm sitting here fighting with my health and then COVID on top of it, last year October I had COVID, November I had pneumonia. Then I'm sitting there and I'm fighting to stay on top of my health. And then COVID comes along and I'm sitting here thinking God dang it, that's what's going to take me down." - FMNM Tenant*

Luckily, no tenants passed away due to COVID. Safety is one of the core principles of housing first, being able to have tenants feel safe in their individual homes and in the building was fully possible with COVID.

Lastly, was the wish for the end of the pandemic. Tenants were asked if a magic wand could be waived, what is one thing they would like to see and two tenants answered they would wish to see COVID end. Tenants at Forget-Me-Not Manor go through many struggles after moving in and several years after residing. While COVID could have been much worse in the sense of mortality, it still left a lasting impact on the tenants that other individuals may not have faced. Tenants at FMNM faced the loss of activities and culture, lack of safety, and during a time when things in their life should be coming together they only wished for the pandemic to end.

**Theme Five: Residents continue to feel judgment by friends, family, providers, and the community in general.**

Many tenant's expressed pride in how far they have come, even if they are still drinking or have health issues or feel alone. All participants have overcome numerous obstacles and work towards managing their trauma, and grief, and overall they feel good about where they are now versus prior to entering FMNM. Tenant's also are very aware of and honest about their circumstances, health conditions, mental health challenges, and they are also very aware of how they are often perceived by others in their family and community. Tenant's shared that being judged for their lifestyle is a frequent occurrence and how they might avoid participating in family, cultural, and community events because of that perceived judgment. One tenant shares how it made her feel to be acknowledged by a physician for something positive:

*Interviewee: So that was good too when I went in sober , because it was an emergency room doctor that has seen me regularly high. And he was just so happy for me. I think I was like six months clean last time I went to the emergency room, it was like. And I needed a diabetic machine. Mine had gotten stolen. And he made it work. He*

*came in with all these supplies and dumped them on my lap and said, is that going to work for you? Are you going to be okay? Are you going to check your sugars now? Now you don't have an excuse. But he was really happy for me, and that made me happy that you know, because I've never lied to this doctor, ever. Not once. Even when I was high. - FMNM Tenant*

When asked, 'If life was the way you would want it to be, what would that look like?', one tenant shared they just would like to be part of the community:

*It would look like I was a part of the community, I had my family with me, and it'd be – that'd be it, probably. Just a part of the cultural community, spiritual community. - FMNM Tenant*

Many of the tenant's appreciate being listened to and supported by FMNM staff and attribute their increased health and wellness today to living at FMNM.

### DISCUSSION

The data shows that across all phases and time periods there are both large and small decreases in the use of ambulance transports, police, and the ER among those who reside at FMNM. In general, residents report feeling improved health, and increased engagement with primary care. They feel safer and more hopeful. They are also in pain and many things remain a struggle. Substance use has changed in some dramatic and some subtle ways for many long-term residents. Finally, it is clear in the qualitative data that residents attribute this success both to their own fortitude, but also to the staff and structure of the program. At FMNM, they are able to see the therapist and case manager in the building, and they feel supported and connected to these individuals. They can have regular follow up care in the health clinic located on the first floor of the building. Finally, they have a deep and abiding trust in FMNM staff to support them but also allow autonomy to live as tenants and not as clients, and to lead their own decision making. In closing, we offer the following quote, which is a response to the question, "what would you change if you had a magic wand?" In this instance, after some reflection, the participant responded:

*“Actually, to tell you the truth, it'd be exactly the way that I woke up this morning--I felt great. I woke up and I was in a nice comfortable bed with a nice big fat comforter over the top of me. I was nice and warm. And then I went and got some breakfast. And to me, it couldn't have been any better.” - Long Term FMNM Tenant*



City and Borough of Juneau  
Mr. Rorie Watt, CBJ Manager  
RE: Juneau Housing First Collaborative Phase III

Dear CBJ Assembly Members and Mr. Manager:

This letter supports a funding request for the development and construction of Phase III of the Juneau Housing First Collaborative Project. Phase 3 would add 28 units of housing to the existing building. Three of the units will be used for the Juneau Medical Respite Program.

The Juneau Coalition of Housing and Homelessness (JHCC) is a partnership of local agencies and organizations who serve Juneau's most vulnerable residents, the homeless, and those most affected by limited housing and the high cost of living. These organizations participate in the Juneau Continuum of Care by providing emergency, transitional, permanent supportive, and supportive services to clients and are working together to develop solutions.

Phases I and II of the Juneau Housing First Collaborative Project have been in operation since 2017 and 2022 respectively. Both projects clearly demonstrate a dramatic reduction in the usage of emergency services such as BRH's Emergency Department and Capital City Fire and Rescue among the residents. In addition to reduction in emergency services utilization, a five-year study conducted by the University of Alaska using data from Bartlett Regional Hospital, CCRF, and program tenants demonstrates an improvement in the quality of life of residents as well. Social service agencies report improvements in service delivery as a result of the project coming online.

It is clear that Juneau has a housing crisis for all types of housing. People who need permanent supportive housing are highly vulnerable and are likely to die on the street. They are high utilizers of CBJ's emergency services. Juneau Housing First Collaborative has a great track record in developing and operating permanent supportive housing. Municipal support will help the development and construction of this project.

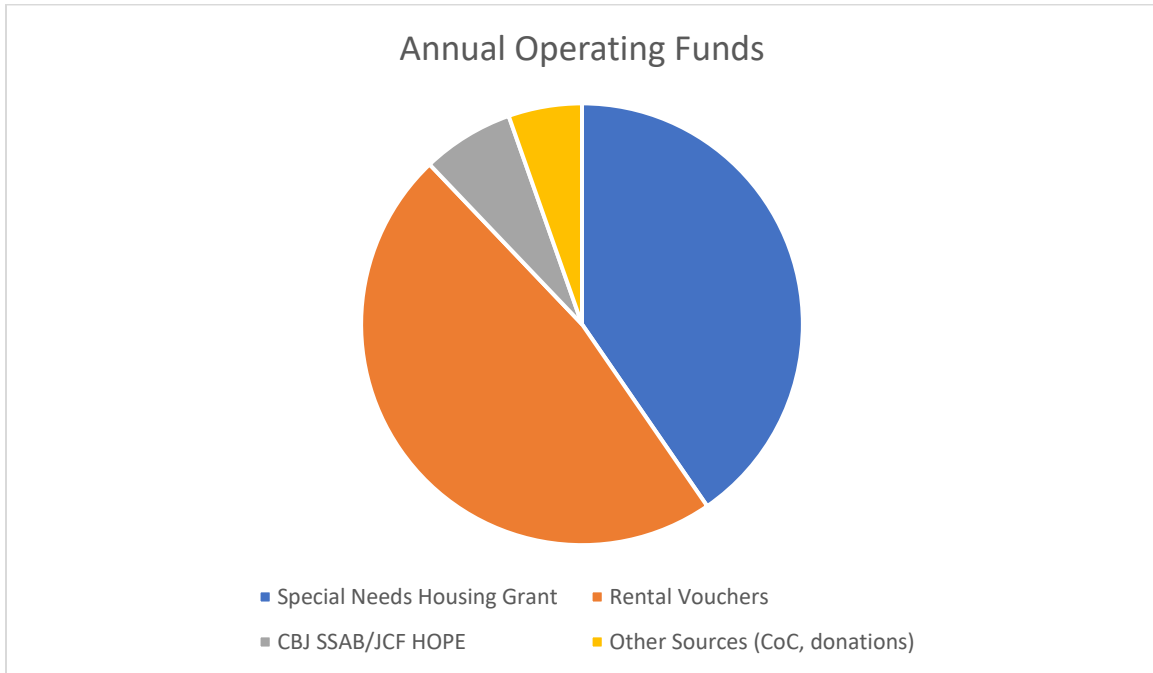
JCHH understands that the request is significant and the timeline tight. Phase 3 of housing first will reduce the housing crisis by adding to the stock of permanent supportive housing, will dramatically reduce emergency service use, improve the quality of life, and will bring millions of dollars in construction and operating funding to Juneau. Housing First Phase 1 and 2 have had a tremendous impact on our community.

Sincerely,

Dave Ringle  
Co-chair of JCHH  
Executive Director  
Society of St. Vincent de Paul St. Therese Conference

Hazel Lecount  
Co-chair of JCHH  
Executive Director  
Polaris House

FORGET-ME-NOT-MANOR PHASE 3 AND OPERATING FUNDS



Population

- 76% Alaska Native individuals
- 64% Male
- 36% Female
- Average age 52 (range 32-76)
- Adults experiencing chronic homelessness and suffering from symptoms of cooccurring disorders
- High emergency services utilization (Emergency Room, Police, Sleep Off)

Existing Project

- 64 units of permanent supportive housing
- Land owned by Tlingit and Haida Regional Housing Authority
- Supportive services on site provided by JAHMI Health and Wellness and SEARHC
- Landlord, coordination, and residential support services provided by the Juneau Housing First Collaborative

University of Alaska 5 Year Evaluation Study

- 40% reduction in police contacts
- 55% reduction in Emergency Room services
- 52% reduction in ambulance transport
- Significant improvement in well-being, sense of safety, decrease in substance disuse



*The Alaska Committee*  
P.O. Box 22138 • Juneau AK 99802 • (907)789-2903

**Board Members**

April 14, 2023

**Wayne Jensen**  
*Chair*

Re: Gavel Alaska Equipment Replacement

**Max Mertz**  
*Vice Chair*

Mayor Beth Weldon  
City and Borough of Juneau  
155 S. Seward Street  
Juneau, AK 99801

**Win Gruening**  
*Secretary*

**Connie Hulbert**  
*Treasurer*

Dear, Mayor Weldon

**Mary Becker**

Perhaps the most important program that Juneau has sponsored to support improved access to the Alaska Legislature is the creation of Gavel Alaska. Since 1995 The program has grown and developed into an integral component to deliver information on the Legislative sessions throughout Alaska.

**Andrea**

**Dru Fenster**

**Cordova Pleasants**

**Jesse Kiehl**

Regularly the electronic components that are essential to make the program work need to be replaced. The server and the equipment that make streaming possible are both in dire need of replacement. The attached spreadsheet outlines the estimated cost of the two components; the Server is estimate to cost approximately \$272,000 and the Encoder/Decoder Streaming equipment is estimated to cost approximately \$64,000. The Alaska Committee requests the CBJ consider contributing to replacing these essential pieces of equipment.

**Greg Smith**

**Kevin Jardell**

**Diana Cote**

**Jeff Grant**

**Teresa Young**

**Duff Mitchell**

**Beth Weldon**

Thank you for your consideration.

**Robert Venables**

Sincerely,

**Maggie McMillan**

**Liz Perry**

**Brian Holst**

**Craig E. Dahl**

Wayne Jensen, Chair  
The Alaska Committee

Attachment

Cc: Justin Shoman, General Manager KTOO  
Jeff Rogers, CBJ Finance Director

			Subtotal	#REF!
<b>Harmonic</b>	<a href="https://www.harmonic-intel.com/orderporterpdf/pdfs/">ndows.net/orderporterpdf/pdfs/</a>			
<b>Part #</b>	<b>Description</b>	<b>QTY</b>	<b>Price</b>	<b>Ext. Price</b>
Harmonic MediaCenter				\$275,390.00
Harmonic System Manager	Manager, without Display and			\$6,000.00
Harmonic One Care	Month term, 3 day advance			\$16,923.03
Services	<a href="#">OUT, TEST AND</a>			\$10,000.00
Deal Discount				(\$24,999.99)
Harmonic Trade-in Credit				(\$16,000.00)
Install Labor (in -house)		40 hours	\$40/hour	\$1,600.00
Install Labor (contract)		20 hours	\$150/hr	\$3,000.00
			<b>Subtotal</b>	<b>\$271,913.04</b>

**Haivision SRT Encoder / Decoder recommendations**

Qty	Part #	and 1 1x4 decoders):	Price	Ext. Price
2	S-MX4E-SDI4	encoder channels in the	\$11,707	\$23,414
1	S-MX4D-SDI4	decoder channels in the	\$6,829	\$6,829
1	FMB6X-RAC	Chassis - Up to 6 Makito	\$4,878.00	\$4,878.00
3	S-PLAY-2000-B	Top Box for Haivision	\$634.00	\$1,902.00
		<b>(1 1x4 encoders and 1</b>		
1	S-MX4D-SDI4	decoder channels for	\$6,829	\$6,829
1	S-MX4E-SDI4	encoder channels for the	\$11,707	\$11,707
1	S-PLAY-2000-B	Top Box for Haivision	\$634.00	\$634.00
		partners like APM /		
	Escalation in price			10%
			<b>Subtotal:</b>	<b>\$61,812</b>

Install Labor (in -house)		40 hours	\$40/hour	\$800.00
Install Labor (contract)		20 hours	\$150/hr	1500
			<b>Estimated Total</b>	<b>\$64,112</b>

# JEDDC Funding Request to CBJ Assembly for FY24 Budget



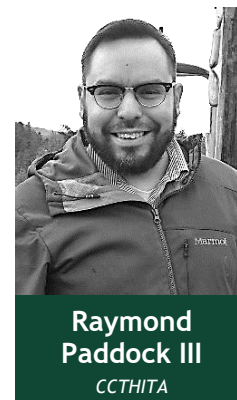
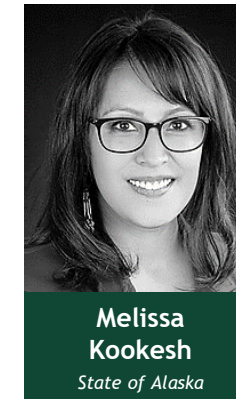
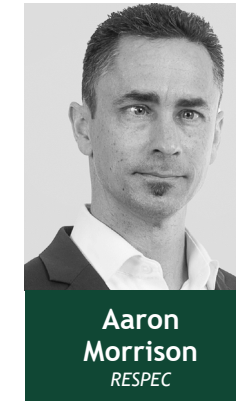
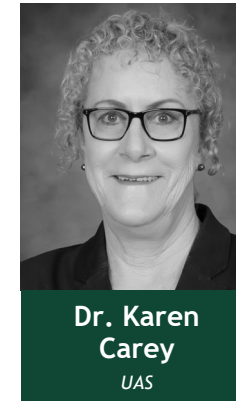
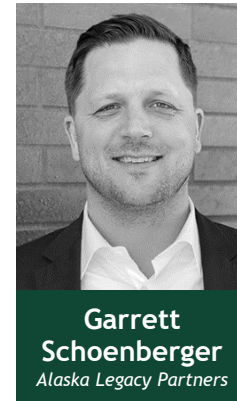
*May 3, 2023*

# 11-Member Board

- CBJ Mayor
- UAS Chancellor

*Members Appointed by Assembly:*

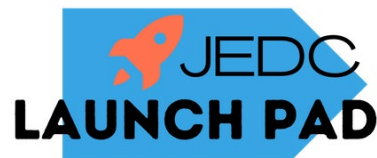
- Organized Labor Seat
  - Environmental Seat
  - Seven At-Large Members
- + CBJ Assembly Liaison





# JEDC's Five Areas of Focus

- *Help Make Juneau a Great (Capital) City*
- *Strengthen Key Regional Industries*
- *Develop Talent*
- *Promote Entrepreneurship and Small Business Development*
- *Deliver Economic Development Services*



# FY24 Request, Additional \$70,000

- *We are in the budget for \$400,000, which is our core funding support from CBJ. CBJ has supported JEDC with core funding support every year since 1987.*
- ***\$40,000 increase to Core Funding.** We have been at the current level of support since FY19 and request a 10% increase to compensate for inflation.*
- ***\$30,000 to leverage USFS funding.** We have a current agreement with the USFS that requires a \$30,000 match. We seek additional funding for Regional Visitor Industry work, which requires an additional match.*

# FY23 Highlights To-Date

# Help Make Juneau a Great (Capital) City

Section D, Item 4.

- ✓ *Continued collaboration with Downtown Business Association, Aak'w Village District partnership, and Alaska Committee.*
- ✓ *Published research note on Juneau's housing stock and short-term rentals, evaluating the impact of the short-term rental market on worsening affordability and availability.*
- ✓ *Partnered with Southeast Alaska Building Industry Association (SEABIA) on addressing Juneau's housing challenges.*
- ✓ *Collaborated with Juneau's Legislative Delegation to improve data collection for monitoring the movement, removal, and addition of State jobs here and statewide.*

**AAK'W VILLAGE  
ARTS & CULTURAL  
DISTRICT**



# Strengthen Key Regional Industries

- ✓ *Supported the Visitor Products Cluster Working Group (VPCWG) to increase access to federal lands, increase small cruise volume, develop winter tourism, and promote sustainable, regenerative tourism.*
- ✓ *Secured a five-year funding agreement with USFS to support the work of the VPCWG.*
- ✓ *Conducted planning and design activities for non-local, seasonal workforce dormitory-style housing project.*
- ✓ *Assisted in organizing the 2<sup>nd</sup> annual Mariculture Conference of Alaska in Juneau.*
- ✓ *Monitored and engaged with regional clusters in Renewable Energy, Mining, Arts, and Research.*



MINING SERVICES AND SUPPLY



ARTS & CULTURE



R&D



RENEWABLE ENERGY

# Develop Talent

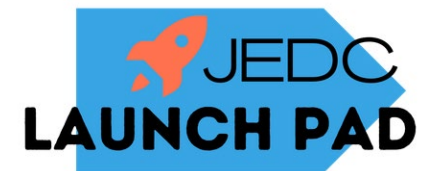
- ✓ Continued to manage CBJ Childcare Loan Program to increase childcare slots in Juneau.
- ✓ Collaborated with AEYC and the CBJ Childcare Taskforce on efforts to improve availability, quality and affordability.
- ✓ Oversaw the statewide FIRST in Alaska organization, supporting **240** Alaskan robotics teams, sending **2** teams to the world championships in Houston!
- ✓ Restarted the Juneau STEM Coalition to support the development of STEM skills in young students.
- ✓ Secured a **\$2.5 million** grant to support development of an eldercare workforce in Juneau and Southeast Alaska.
- ✓ Organized **15** STEM summer camps, including designing an “Intro to Trades” camp for middle schoolers.



# Promote Entrepreneurship & Small Business

Section D, Item 4.

- ✓ *Lead organization of the 2023 Alaska Angel Conference.*
- ✓ *Mentored and hosted 5 Alaskan startups to compete in the "Pitch Contest" at the 2023 Innovation Summit.*
- ✓ *Facilitated "LaunchPad," a twelve-week program providing training and guidance to 10 aspiring Juneau entrepreneurs.*
- ✓ *Actively supported the Arctic Innovation Competition.*
- ✓ *Made two new Revolving Loan Fund loans to Juneau businesses.*
- ✓ *Implemented USDA Rural Business Development Grant to expand The Local Frequency program expand within Juneau and to Haines and Petersburg,*



THE **local**  
FREQUENCY

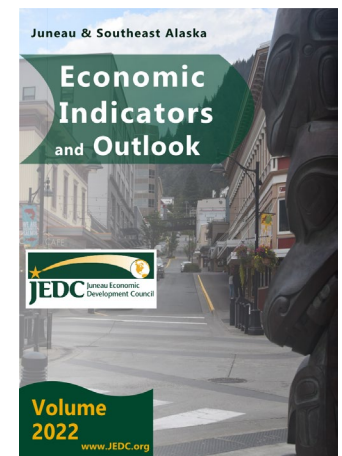
# Deliver Economic Development Services

Section D, Item 4.

- ✓ *Delivered \$34.5 million in State of Alaska grant assistance to 467 Alaskan businesses.*
- ✓ *Organized and executed the 12<sup>th</sup> annual Innovation Summit to explore how Alaska companies can incorporate purpose into their business strategy to do better financially while also doing better for the communities and other stakeholders.*
- ✓ *Continued to close remaining CBJ pandemic emergency loans, recovering and returning to CBJ over 90% (\$2.77 million) of the \$3 million authorized by the Assembly in April 2020.*
- ✓ *Completed research and analysis for the 2022 Juneau and Southeast Alaska Economic Indicators and Outlook Report.*

**ALASKA**  
DEPARTMENT OF  
COMMERCE,  
COMMUNITY,  
AND ECONOMIC  
DEVELOPMENT

**INNOVATION**  
**SUMMIT**





# FY24 Funding Request

# \$470,000 in FY24 from CBJ

(\$440K core support and \$30K match support):

- *Close-out of CBJ Emergency Loan Program.*
- *Expand Visitor Products Cluster work through a five-year USFS funding agreement, using \$30,000 per year in match.*
- *Planning and design activities for seasonal, non-local workforce dormitory-style housing project.*
- *JEDC's Economic Indicators & Research Projects.*
- *JEDC's Five Areas of Focus (JEDC Work Plan).*

# Thank you!

Learn more at [JEDC.org](https://www.jedc.org)





### JEDC Funding Request to CBJ Assembly for FY24 Budget

**The Juneau Economic Development Council (JEDC) requests funding for FY24 of \$470,000.**

JEDC is seeking support from CBJ for Core Support and for Matching Grant Support in FY24:

- Core Support of \$440,000, a 10% increase from the funding of the last several years.
- Matching Grant Support of \$30,000, allowing JEDC to leverage federal resources from a five-year grant with the USFS.

CBJ has provided core funding support to the JEDC since the organization was created in 1987 by CBJ Ordinance. Though JEDC is an independent organization, the CBJ Assembly appoints JEDC's Board, and our goals and activities align with the community's overall economic interests.

#### **Core Funding**

Core funding supports the execution of JEDC's annual Board-approved budget and work plan, which aligns with the Juneau Economic Plan. Core resources are leveraged significantly, historically bringing in significant additional resources to JEDC to deliver economic development programming in our community and region. The stability provided by core funding from the CBJ allows JEDC to maintain basic infrastructure, pursue long-term goals, invest in developing talented staff, and be ready when needed to support our community to respond to crises and opportunities.

#### **Increased Costs due to Inflation**

JEDC has been impacted by rising costs, like other organizations. In our request this year, we are seeking a 10% increase to our base Core Funding Request, or \$40,000 in additional funds. JEDC has received CBJ Grant Funding at or above \$400,000 for several years (in early 2020, the JEDC Board reduced our request to \$75,000 given the stress on the CBJ FY21 budget during the initial uncertainty of Covid). Inflation has exceeded 16% since the beginning of FY21 (source: US Bureau of Labor Statistics).

#### **Match Federal Funds**

JEDC has facilitated the Visitor Products Cluster Working Group (VPCWG) for over 13 years. Under the USDA's Southeast Alaska Sustainability Strategy (SASS), the U.S. Forest Service agreed to fund JEDC activities with \$750,000 over the next five years to support the work of the VPCWG. The SASS, with direct input from Southeast stakeholders, aims to advance economic, ecologic, and cultural sustainability in Southeast. JEDC will strengthen the region's private-sector economic drivers of tourism and recreation in alignment with these sustainability goals. The funding agreement requires a 20% match over the life of the partnership. We are seeking \$30,000 in funds from CBJ to meet the match requirement for FY24.

#### **COVID Relief**

JEDC has played an active role throughout the Covid-19 pandemic, coordinating response and recovery activities with multiple local partners. JEDC's research unit has produced timely information about impacts on Juneau's economy as well as other resources available to businesses, organizations, and individuals. To-date, JEDC delivered \$34.5 million of State of Alaska grant assistance to 467 Alaska businesses during FY23. JEDC has also managed CBJ Emergency Loan Funds, with over 90% of the \$3 million in early pandemic relief assistance recovered to-date. CBJ's core support to JEDC enabled us to have the capacity to respond during this crisis.



## FY24 Description of Programs and Services

Established in 1987 as a private, nonprofit corporation, **Juneau Economic Development Council (JEDC)** receives core funding from the CBJ while leveraging this investment to develop additional funds through strategic alliances with forward-looking businesses, community groups, and government agencies. JEDC's programs and services stem from annual priorities set by the JEDC Board in alignment with the Juneau Economic Plan, as well as any special initiatives identified by the CBJ Assembly & City Manager's Office directed to JEDC.

JEDC's mission is to foster a healthy and sustainable economic climate in Juneau and throughout Southeast Alaska. In collaboration with other organizations, JEDC implements initiatives to maintain, expand, and create jobs and economic opportunities.

JEDC delivers on its mission through five areas of focus:

- 1) Help Make Juneau a Great (Capital) City
- 2) Strengthen Key Regional Industries
- 3) Develop Talent
- 4) Promote Entrepreneurship and Small Businesses
- 5) Deliver Economic Development Services

### **1. Help Make Juneau a Great (Capital) City**

#### **Juneau Economic Plan Initiative Areas:**

- *Revitalize Downtown*
- *Enhance Essential Infrastructure*
- *Protect and Enhance Juneau's Role as Capital City*
- *Promote Housing Affordability and Availability*
- *Build the Senior Economy*

#### **FY24 Strategic Priorities**

- A. *Enhance the downtown Juneau experience for key stakeholders: Juneau residents; Legislators/State Government; Alaskans visiting their Capital City; and tourists (in that order).***

##### **DOWNTOWN REVITALIZATION**

- Promote and develop downtown Juneau through collaboration with the Downtown Business Association (DBA) and Main Street America Program.
- Maintain attention on previously identified goals of downtown stakeholders: 1) improve the built environment; 2) circulate people more effectively to/from/through downtown; and 3) increase housing density.



#### HOUSING

- Continue to communicate the need and opportunity for more housing investment in Juneau through presentations and social media, including the economic case for senior housing.
- Conduct Research on Non-Local Seasonal Workforce Housing.
- Develop Project Concept for a dormitory-style building to house non-local seasonal workers in the visitor industry.
- Help identify low-income housing opportunities.
- Respond to requests for information from developers about potential projects.
- Leverage work with the Southeast Alaska Building Industry Association (SEABIA) to promote housing and development in Juneau.
- Support the Juneau Medical Respite Program to assist with access to temporary convalescent lodging for the homeless.

**B. *Attract people to Juneau that can work from anywhere and assist local employers in recruiting and retaining workers year-round.***

#### CHOOSE JUNEAU

- Manage and maintain a refreshed Choose Juneau campaign, website, and social media presence.

**C. *Counter efforts to move the Legislature and state government jobs out of Juneau.***

#### ALASKA COMMITTEE

- Support Alaska Committee actions to enhance Juneau as a great capital city. Represent the Alaska Committee at one of the State Fairs or other events, as needed.
- Research the needs/perceptions of Legislators and others doing government business in Juneau.

#### CAPITAL CREEP

- Track, in coordination with the Juneau delegation, Capital Creep, and advocate to department commissioners and state administration. Identify trends in government job movements to/from Juneau and other locations in Alaska.

**D. *Increase investment and partnerships in the Aak'w Village District.***

- Coordinate district meetings to facilitate and share information on coordination and investment opportunities.

## **2. Strengthen Key Regional Industries**

### Juneau Economic Plan Initiative Areas



- *Build on our Strengths*
- *Recognize and Expand Juneau's Position as a Research Center*

**FY24 Strategic Priorities**

**A. Support Visitor Products Cluster to meet increased tourism demand while enhancing (or maintaining) the experience of residents.**

VISITOR PRODUCTS CLUSTER

- Support Visitor Products Cluster Working Group, including creating meeting agendas, inviting speakers, issuing meeting invitations, and developing and supporting Action Initiatives.
- Execute a five-year funding agreement with USFS under the Southeast Alaska Sustainability Strategy (SASS).
- Promote sustainable and regenerative tourism.
- Increase guided access to remote public lands.
- Increase small cruise turnaround volume in Juneau.
- Help develop winter visitor products in coordination with Eaglecrest, Travel Juneau, and the Visitor Products Cluster Working Group.

**B. Support the Oceans Cluster.**

OCEANS CLUSTER

- In the absence of a more formal industry working group, identify and pursue issues to develop our ocean's economy.
- Organize and execute the annual Juneau Maritime Festival.
- Participate in activities of the AlaskaNor research effort.
- Explore winter opportunities in the oceans sector, such as winter processing and harvesting of ocean products and maritime services

**C. Support the Mining Service and Supply Cluster.**

MINING SERVICE AND SUPPLY CLUSTER

- Promote the development of a mining workforce that is based in the region.
- Encourage procurement of goods and services needed by the mines to be done through local businesses.

**D. Support the Renewable Energy Cluster.**

RENEWABLE ENERGY CLUSTER

- Secure a USDA Rural Energy Savings Program (RESP) loan to carry out a re-lending program to implement energy efficiency measures (air source heat pumps, specifically) that will lower energy usage and costs to qualified residents and taxpayers.



- Collaborate with AEL&P on an On-Bill financing program to support home energy efficiency improvements, including deploying heat pumps into the residential sector.
- Increase the application of renewable energy in Juneau's economy.
- Expand electric vehicle transportation.

**E. Support the Arts/Creative Economy.**

ARTS/CREATIVE ECONOMY

- Promote Juneau as the Northwest Coast Arts Capital.
- Connect visitor industry businesses with a network of native artists, storytellers, and creators for more authentic cultural tourism.

**F. Support the Research Cluster**

RESEARCH CLUSTER

- Increase Federal research jobs in Juneau, including continued efforts to increase NOAA and USCG presence in Juneau (Alaska Research Center and Vessel Homeporting).
- Leverage service on the Alaska State Committee on Research to strengthen the links between academia and the private sector.
- Pursue grants related to technology transfer capacity.

### **3. Develop Talent**

**Juneau Economic Plan Initiative Areas:**

- *Attract and Prepare the Next Generation Workforce.*

**FY24 Strategic Priorities**

- A. Support the implementation of a comprehensive early education program for Juneau's youngest population, which meets three goals: improves kindergarten readiness (and overall K-12 efficiency and outcomes); creates more high-quality, affordable childcare for working families; and makes Juneau an attractive place for families to stay/locate to work and raise their families.**

Early Education and Childcare

- Increase the number of children in Juneau with access to childcare, Pre-K, and other pro-family services.
- In conjunction with AEYC, produce the Childcare by the Numbers report.
- Assist CBJ with implementing recommendations from their Childcare Taskforce, including increased support for childcare operators.
- Support the CBJ Childcare Loan Program to increase the number of childcare slots in Juneau.





**B. Provide high-quality science, technology, engineering, and math programming opportunities for K-12 Alaskans so they are better prepared for the workforce.**

**FIRST STATEWIDE ROBOTICS**

- Oversee the FIRST in Alaska organization, including identifying funding sources.
- Continue improving training, resources, and communication tools for coaches and teams, including for-credit coach training at UAA.
- Advance the following program metrics for FIRST:
  - Grow the number of teams.
  - Increase team satisfaction with support from FIRST in Alaska.
  - Increase student interest in STEM education and careers.
  - Increase the number of high school graduates pursuing STEM degrees.
  - Increase diversity & equity amongst FIRST participants.

**STEM PROGRAMMING**

- Deliver high-quality STEM summer camps to Juneau youth.
- Offer at least one program in Section 8 housing, such as Gruening Park, with no charge to participants.
- Continue support to the Juneau STEM coalition.
- Grow the number of STEM mentors/activity leaders volunteering in after-school STEM programs through high school teams, community partnerships, and the Juneau STEM Coalition.
- Encourage a high-quality STEM curriculum for every student in Juneau.
  - Increase the use of kits in the Juneau School District (JSD) Science Kit Center.
  - Loan out JEDC-owned robotics equipment.

**ECONOMIC EDUCATION**

- Facilitate the Junior Achievement Program.
- Advocate for increased economics or business classes at TMHS and JDHS.

**C. Help make Juneau an attractive place for people to retire and age comfortably.**

**SENIORS**

- Execute a grant from Margaret A. Cargill Philanthropies to implement a project to increase workforce participation and improve in-home services for our elders across Southeast Alaska.

## **4. Promote Entrepreneurship and Small Business Development**

**FY24 Strategic Priorities**

**A. Provide training and support to entrepreneurs and regulatory/permitting assistance/counseling to small businesses.**



ENTREPRENEURSHIP AND SMALL BUSINESS DEVELOPMENT

- Create networking opportunities for entrepreneurs, create more entrepreneurship-focused content at the Innovation Summit, and link entrepreneurs in Juneau to networks, programs, competitions, and resources across Alaska.

ARCTIC INNOVATION COMPETITION

- Serve as a judge and contribute investment through sponsorship to help fund innovative ideas and projects in Alaska.

**B. Support the Southeast Alaska Revolving Loan Fund.**

SOUTHEAST ALASKA RLF

- Assess applications and make new loans from JEDC's existing funds in FY24.

**C. Support the Alaska Angel Conference.**

ALASKA ANGEL CONFERENCE

- Help organize the 2024 Alaska Angel Conference and contribute investment to help build Alaska's Startup Ecosystem.

**D. Administer and expand the Local Frequency program.**

LOCAL FREQUENCY

- Continue to grow the number of active users, merchant businesses, and nonprofits in Juneau.
- Expand programming and app adoption to other Southeast Alaska communities, including Haines and Petersburg, with USDA Rural Business Development Grant (RBDG) funding.

## **5. Deliver Economic Development Services**

***FY24 Strategic Priorities***

**A. Produce and publish regular economic research, including a 2023 Juneau & Southeast Alaska Economic Indicators Report.**

RESEARCH

- Produce a 2023 Juneau & Southeast Alaska Economic Indicators Report.
- Provide monthly economic indicators for JEDC News.
- Provide current economic statistics for presence on the radio.
- Maintain an updated Economic Profile for Juneau.
- Provide updated economic figures on the JEDC website.
- Deliver presentations to community groups about Juneau's economy.



- Respond to requests for economic data by media, businesses, and agencies.
- Produce JEDC Research Notes on relevant topics (to be determined).

**B. Organize and execute the 2024 Innovation Summit.**

INNOVATION SUMMIT

- Organize, host, and execute a 2024 Innovation Summit that highlights the successes of state and regional entrepreneurs and thought leaders, and provides an outlet to foster relationships and inspire new perspectives.

**C. Represent JEDC in various forms and capacities, including developing internal systems to better support client organizations.**

GENERAL

- Represent JEDC in various forms and capacities, including developing internal systems to better support client organizations.

POST-SECONDARY EDUCATION

- Support UAS as an anchor for economic development in Juneau. Serve on the UAS Campus Council and advisory groups for UAS management programs.
- Assist with regional workforce development efforts, such as the 65 by 25 initiative.

**D. Deliver state and local emergency grant programs.**

AK-ARPA BUSINESS RELIEF PROGRAM

- Administer the AK-ARPA Business Relief Program in partnership with the State of Alaska.

CBJ COVID EMERGENCY LOANS

- Manage and close out of remaining loans under the CBJ Covid-19 Emergency Loan Program.

## **6. Organizational Development**

OUTREACH & COMMUNICATIONS

- Maintain communication across multiple web pages, including Choose Juneau, FIRST, and Maritime Festival. Integrate messages with partners when appropriate.
- Continue monthly radio show on Action Line.

NETWORKING

- Create networking opportunities across businesses, organizations, and communities throughout our region, including Whitehorse, Seattle, Anchorage, Fairbanks, and Southeast communities.

INVESTOR PROGRAM



612 West Willoughby

Section D, Item 4.

Juneau, AK 99801  
Phone: (907) 523-2300  
Fax: (907) 463-3929  
[www.JEDC.org](http://www.JEDC.org)

- Increase the number and amount of private sector contributions to JEDC.
- Improve communication for JEDC Investors, including news, events, and research.

#### FUND DEVELOPMENT

- Identify new donor partners to advance JEDC programming.
- Maintain SAM registration and continue to explore federal grant funding opportunities.

#### STAFF TRAINING AND DEVELOPMENT

- Explore opportunities for JEDC staff to develop talents in economic research, group facilitation and consultation, small business coaching, grant writing, and other areas.
- Develop a model to showcase how JEDC's approach reflects a commitment to flexibility for new hires, external facing communications, and internal planning.

#### PROPERTY DEVELOPMENT

- Create a plan to redevelop the current office location that reinforces the long-term vision and development goals of our neighborhood.

**JEDC BUDGET FY2024, Projected**

	Capital City	Regional Industries	Entrepreneurs	Talent	Eco Dev Svc	Program Total	% Program Resources	G&A	Agency Total	% Total Resources
CBJ Operating Grant	44,000	88,000	176,000	88,000	44,000	440,000	13.68%	-	440,000	13.04%
Corporate Grants, Sponsorships & Donations	47,000	185,000	15,000	1,412,005	-	1,659,005	51.57%	-	1,659,005	49.17%
Other Program Revenue	108,000	35,000		41,000	860,000	1,044,000	32.45%		1,044,000	30.94%
Gaming Revenue	-	2,500		19,500	-	22,000	0.68%		22,000	0.65%
Loan Interest & Fees			52,000		-	52,000	1.62%		52,000	1.54%
Rental Income						-	0.00%	77,100	77,100	2.29%
Investment Income						-	0.00%	80,000	80,000	2.37%
<b>Resources</b>	<b>\$ 199,000</b>	<b>\$ 310,500</b>	<b>\$ 243,000</b>	<b>\$ 1,560,505</b>	<b>\$ 904,000</b>	<b>\$ 3,217,005</b>	<b>100.00%</b>	<b>\$ 157,100</b>	<b>\$ 3,374,105</b>	<b>100.00%</b>
<b>Expenses</b>										
Total 500 · Payroll & Benefits	101,749	122,932	164,019	655,672	755,781	1,800,152	55.96%	233,504	2,033,656	60.27%
512 · Advertising & Website	8,000	5,000	-	-	-	13,000	0.40%	-	13,000	0.39%
513 · Audit & Accounting	-	-	-	-	-	-	0.00%	35,000	35,000	1.04%
514 · Bank & Service Fees	1,500	1,500	1,500	1,500	300	6,300	0.20%	4,500	10,800	0.32%
518 · Computers, Network & Software	4,500	6,000	1,500	3,600	16,600	32,200	1.00%	8,000	40,200	1.19%
521 · Consulting & Contractual	33,500	60,000	1,000	23,000	27,000	144,500	4.49%	2,640	147,140	4.36%
522 · Gaming compensation	-	3,000	-	2,000	-	5,000	0.16%	-	5,000	0.15%
524 · Copies & Printing	800	1,500	-	1,200	-	3,500	0.11%	4,500	8,000	0.24%
527 · Depreciation	-	-	-	-	-	-	0.00%	16,063	16,063	0.48%
530 · Dues, Licenses, Subscriptions	100	500	200	100	-	900	0.03%	1,250	2,150	0.06%
533 · Events & Workshops Sponsored	-	800	1,600	500	-	2,900	0.09%	-	2,900	0.09%
534 · Program Expense	3,600	41,000	-	660,000	-	704,600	21.90%	-	704,600	20.88%
536 · Furniture, Fixtures & Equipment	-	-	-	-	-	-	0.00%	3,000	3,000	0.09%
542 · Insurance	-	500	-	2,000	17,000	19,500	0.61%	14,600	34,100	1.01%
543 · Property Tax Expense	-	-	-	-	-	-	0.00%	12,900	12,900	0.38%
545 · Interest Expense	-	-	2,000	-	-	2,000	0.06%	21,200	23,200	0.69%
548 · Legal Fees	-	-	-	-	-	-	0.00%	1,000	1,000	0.03%
557 · Office Supplies	150	750	-	-	150	1,050	0.03%	4,800	5,850	0.17%
562 · Penalties & Finance Charges	-	-	-	-	-	-	0.00%	-	-	0.00%
563 · Postage & Delivery	-	-	500	500	150	1,150	0.04%	200	1,350	0.04%
566 · Program Supplies	250	10,000	500	12,000	100	22,850	0.71%	-	22,850	0.68%
571 · Building Maintenance & Utilities	1,440	1,405	625	2,775	3,255	9,500	0.30%	42,620	52,120	1.54%
572 · Scholarships & Awards	-	3,400	-	-	890	4,290	0.13%	-	4,290	0.13%
587 · Telephone & Internet	1,350	1,175	500	980	3,250	7,255	0.23%	1,800	9,055	0.27%
589 · Training & Staff Development	3,000	6,000	3,000	3,000	6,955	21,955	0.68%	1,000	22,955	0.68%
590 · Travel, Meals & Meetings	-	-	-	115,000	3,000	118,000	3.67%	-	118,000	3.50%
591 · Staff Travel, Meals & Meetings	2,000	3,000	2,000	15,000	1,000	23,000	0.71%	1,000	24,000	0.71%
592 · Consult Travel, Meals & Meeting	-	15,000	-	-	1,500	16,500	0.51%	-	16,500	0.49%
590 · Travel, Meals & Meetings - Other	-	-	-	-	1,000	1,000	0.03%	-	1,000	0.03%
594 · Shared Overhead	-	-	-	-	-	-	0.00%	-	-	12.14%
						-				
<b>Total Expense</b>	<b>161,939</b>	<b>283,462</b>	<b>178,944</b>	<b>1,498,827</b>	<b>837,931</b>	<b>2,961,102</b>	<b>92.05%</b>	<b>409,577</b>	<b>3,370,679</b>	<b>99.90%</b>
<b>Fund Balance</b>	<b>37,061</b>	<b>27,038</b>	<b>64,056</b>	<b>61,678</b>	<b>66,069</b>	<b>255,903</b>		<b>(252,477)</b>	<b>3,426</b>	

**JEDC BUDGET FY2023**

	Capital City	Regional Industries	Entrepreneurs	Talent	Eco Dev Svc	Program Total	% Program Resources	Building	G&A	Agency Total	% Total Resources
CBJ Operating Grant	120,000	160,000	60,000	40,000	20,000	400,000	19.00%		-	400,000	17.95%
Corporate Grants, Sponsorships & Donations	2,000	185,000	15,000	151,730		353,730	16.80%		45,000	398,730	17.90%
Other Program Revenue	180,000	35,000		41,000	1,022,000	1,278,000	60.69%			1,278,000	57.37%
Gaming Revenue	-	2,500		19,500	-	22,000	1.04%			22,000	0.99%
Loan Interest & Fees			52,000		-	52,000	2.47%			52,000	2.33%
Rental Income						-	0.00%	77,100	-	77,100	3.46%
<b>Resources</b>	<b>\$ 302,000</b>	<b>\$ 382,500</b>	<b>\$ 127,000</b>	<b>\$ 252,230</b>	<b>\$ 1,042,000</b>	<b>\$ 2,105,730</b>	<b>100.00%</b>	<b>\$ 77,100</b>	<b>\$ 45,000</b>	<b>\$ 2,227,830</b>	<b>100.00%</b>
<b>Expenses</b>											
Total 500 · Payroll & Benefits	211,008	299,724	116,967	178,079	523,832	1,329,610	63.14%	-	191,864	1,521,474	68.29%
512 · Advertising & Website	8,000	5,000	-	-	-	13,000	0.62%	-	-	13,000	0.58%
513 · Audit & Accounting	-	-	-	-	-	-	0.00%	-	35,000	35,000	1.57%
514 · Bank & Service Fees	1,500	1,500	1,500	1,500	300	6,300	0.30%	-	4,500	10,800	0.48%
518 · Computers, Network & Software	4,500	6,000	1,500	3,600	16,600	32,200	1.53%	-	8,000	40,200	1.80%
521 · Consulting & Contractual	63,500	90,000	1,000	15,000	37,000	206,500	9.81%	2,640	-	209,140	9.39%
522 · Gaming compensation	-	3,000	-	2,000	-	5,000	0.24%	-	-	5,000	0.22%
524 · Copies & Printing	800	1,500	-	1,200	-	3,500	0.17%	-	4,500	8,000	0.36%
527 · Depreciation	-	-	-	-	-	-	0.00%	16,063	-	16,063	0.72%
530 · Dues, Licenses, Subscriptions	100	500	200	100	-	900	0.04%	-	1,250	2,150	0.10%
533 · Events & Workshops Sponsored	-	800	1,600	500	-	2,900	0.14%	-	-	2,900	0.13%
534 · Program Expense	3,600	41,000	-	30,000	-	74,600	3.54%	-	-	74,600	3.35%
536 · Furniture, Fixtures & Equipment	-	-	-	-	-	-	0.00%	-	3,000	3,000	0.13%
542 · Insurance	-	500	-	2,000	17,000	19,500	0.93%	7,600	7,000	34,100	1.53%
543 · Property Tax Expense	-	-	-	-	-	-	0.00%	12,900	-	12,900	0.58%
545 · Interest Expense	-	-	2,000	-	-	2,000	0.09%	21,200	-	23,200	1.04%
548 · Legal Fees	-	-	-	-	-	-	0.00%	-	1,000	1,000	0.04%
557 · Office Supplies	150	750	-	-	150	1,050	0.05%	-	4,800	5,850	0.26%
562 · Penalties & Finance Charges	-	-	-	-	-	-	0.00%	-	-	-	0.00%
563 · Postage & Delivery	-	-	500	500	250	1,250	0.06%	-	200	1,450	0.07%
566 · Program Supplies	250	10,000	500	12,000	-	22,750	1.08%	-	-	22,750	1.02%
571 · Building Maintenance & Utilities	1,440	1,405	625	2,775	4,145	10,390	0.49%	41,430	1,190	53,010	2.38%
572 · Scholarships & Awards	-	3,400	-	-	-	3,400	0.16%	-	-	3,400	0.15%
587 · Telephone & Internet	1,350	1,175	500	980	4,205	8,210	0.39%	-	1,800	10,010	0.45%
589 · Training & Staff Development	3,000	6,000	3,000	3,000	9,000	24,000	1.14%	-	1,000	25,000	1.12%
590 · Travel, Meals & Meetings	-	-	-	-	-	-	0.00%	-	-	-	0.00%
591 · Staff Travel, Meals & Meetings	2,000	3,000	2,000	15,000	2,500	24,500	1.16%	-	1,000	25,500	1.14%
592 · Consult Travel, Meals & Meeting	-	15,000	-	-	1,000	16,000	0.76%	-	-	16,000	0.72%
590 · Travel, Meals & Meetings - Other	-	-	-	-	-	-	0.00%	-	-	-	0.00%
594 · Shared Overhead	41,938	57,799	17,810	41,435	100,596	259,577	12.33%	(37,335)	(222,242)	0	0.00%
<b>Total Expense</b>	<b>343,135</b>	<b>548,053</b>	<b>149,701</b>	<b>309,669</b>	<b>716,578</b>	<b>2,067,137</b>	<b>98.17%</b>	<b>64,498</b>	<b>43,862</b>	<b>2,175,497</b>	<b>97.65%</b>
<b>Fund Balance</b>	<b>(41,135)</b>	<b>(165,553)</b>	<b>(22,701)</b>	<b>(57,439)</b>	<b>325,422</b>	<b>38,593</b>		<b>12,602</b>	<b>1,138</b>	<b>52,333</b>	

**Juneau Economic Development Council  
Budget vs. Actual - Agencywide**

January 2023

	Jan 23	Budget	Jul '22 - Jan 23	YTD Budget	Annual Budget
<b>Ordinary Income/Expense</b>					
<b>Income</b>					
400 · Government Grants & Contracts	159,433	45,833	1,181,968	320,833	550,000
420 · Non-Govt. Grants & Sponsorsh...	39,900	13,894	81,562	99,259	203,730
430 · Fee Income	22,125	105,917	102,646	731,417	1,278,000
430.1 · Fundraising	0	15,000	0	15,000	45,000
440 · Gaming Income	0	19,500	0	19,500	22,000
445 · Rental Income	3,510	6,425	38,060	44,975	77,100
450 · Interest on Deposits	28		459		
460 · RLF Loan Interest	4,679	4,000	31,802	34,000	52,000
460.1 · CBJ loan interest	193		2,185	0	0
462 · RLF Fee Income	0		(2,608)		
465 · Reimbursed Expenses	0		1,139		
498 · In Kind Contrib & Outside Match	420		2,940		
<b>Total Income</b>	<b>230,289</b>	<b>210,569</b>	<b>1,440,153</b>	<b>1,264,984</b>	<b>2,227,830</b>
<b>Gross Profit</b>	<b>230,289</b>	<b>210,569</b>	<b>1,440,153</b>	<b>1,264,984</b>	<b>2,227,830</b>
<b>Expense</b>					
500 · Payroll & Benefits	116,046	126,790	898,589	887,527	1,521,475
512 · Advertising & Website	718	667	3,504	4,667	13,000
513 · Audit & Accounting	10,000		10,000	35,000	35,000
514 · Bank & Service Fees	1,323	777	4,595	5,437	10,800
518 · Computers, Network & Software	10,722	3,350	38,798	23,450	40,200
521 · Consulting & Contractual	17,486	9,637	58,025	68,457	209,140
522 · Gaming compensation	(150)	2,000	140	2,000	5,000
524 · Copies & Printing	452	542	6,119	3,792	8,000
527 · Depreciation	0	1,339	8,032	9,370	16,063
530 · Dues, Licenses, Subscriptions	1,035	304	5,116	1,029	2,150
533 · Events & Workshops Sponsored	0	0	12,032	1,850	2,900
534 · Program Expense	58	2,800	3,120	19,600	74,600
536 · Furniture, Fixtures & Equipment	0	1,500	0	1,500	3,000
537 · Accounting Questions	0		880		
542 · Insurance	2,990	2,800	22,766	19,600	34,100
543 · Property Tax Expense	1,011	1,075	6,953	7,525	12,900
545 · Interest Expense	0	765	11,926	12,380	23,200
548 · Legal Fees	0	0	0	500	1,000
554 · Misc & Other Costs	525		234		
557 · Office Supplies	148	485	3,231	3,420	5,850
563 · Postage & Delivery	0	138	655	868	1,450
566 · Program Supplies	2,298	1,025	15,747	7,275	22,750
571 · Maintenance & Utilities	5,430	4,418	31,205	30,928	53,020
572 · Scholarships & Awards	0	0	0	0	3,400
587 · Telephone & Internet	1,561	834	15,975	5,839	10,010
589 · Training & Staff Development	0	3,500	4,443	11,000	25,000
590 · Travel, Meals & Meetings	4,839	2,333	30,308	12,833	41,500
<b>Total Expense</b>	<b>176,494</b>	<b>167,077</b>	<b>1,192,395</b>	<b>1,175,846</b>	<b>2,175,508</b>
<b>Net Ordinary Income</b>	<b>53,795</b>	<b>43,492</b>	<b>247,759</b>	<b>89,138</b>	<b>52,322</b>
<b>Other Income/Expense</b>					
<b>Other Income</b>					
900 · Investment Income (net)	165,779		252,025		
<b>Total Other Income</b>	<b>165,779</b>		<b>252,025</b>		
<b>Net Other Income</b>	<b>165,779</b>		<b>252,025</b>		
<b>Net Income</b>	<b>219,574</b>	<b>43,492</b>	<b>499,784</b>	<b>89,138</b>	<b>52,322</b>

**Juneau Economic Development Council**

**Balance Sheet**

As of January 31, 2023

	Jan 31, 23	Jan 31, 22	\$ Change
<b>ASSETS</b>			
<b>Current Assets</b>			
<b>Checking/Savings</b>			
100 · JEDC Main Checking Account	39,435	730,588	(691,153)
101 · First Bank PPP	788	788	0
101.1 · Merrill Lynch (BOA Checking)	3,056,322	2,004,961	1,051,361
102.0 · WFB Savings Main	8,268	19,139	(10,871)
103.1 · WF Grants Checking #6327	301,297	1,406,665	(1,105,368)
103.2 · WF Grants Savings #6301	51,248	2,011,131	(1,959,883)
104.1 · True North Savings #7760S	996	996	1
104.2 · True North Checking #7760	92,044	60,335	31,708
107 · Paypal Account Balance	0	627	(627)
109 · Petty Cash Fund	121	256	(135)
110.0 · RLF Main Bank	30,651	92,645	(61,994)
111 · USDA IRP RLF WFB *4728	79,017	98,657	(19,640)
112 · Haines RLF WFB *4736	22,327	18,856	3,470
114 · Haines RLF Rsrv WFB *4744	16,508	16,505	4
118 · Gaming WFB *6825	7,512	3,577	3,935
<b>Total Checking/Savings</b>	3,706,534	6,465,724	(2,759,190)
<b>Accounts Receivable</b>	237,638	17,547	220,091
<b>Other Current Assets</b>			
12000 · Undeposited Funds	34,550	0	34,550
121.1 · clearing account	0	(1,095)	1,095
141 · Prepaid Insurance Prop & Liab	21,383	18,315	3,068
142 · Prepaid Worker's Comp Insuran...	464	578	(114)
145 · Deposits & Other Prepaid Exp	2,026	10,035	(8,009)
<b>Total Other Current Assets</b>	58,422	27,832	30,590
<b>Total Current Assets</b>	4,002,594	6,511,103	(2,508,510)
<b>Fixed Assets</b>			
150 · Fixed Assets	673,004	673,004	0
151 · Accumulated Depreciation	(54,561)	(38,497)	(16,063)
159 · Land	477,431	477,431	0
<b>Total Fixed Assets</b>	1,095,875	1,111,938	(16,063)
<b>Other Assets</b>			
<b>160 · Securities</b>			
161 · ML Bucket A 28H-02158	459,701	420,086	39,615
162 · ML Bucket B 28H-02124	625,280	294,616	330,664
163 · ML Bucket C 28H-02138	1,500,307	1,438,024	62,283
164 · ML Alternative Invest 28H-02207	199,866	0	199,866
165 · Alexandria Capital	805,449	774,150	31,300
<b>Total 160 · Securities</b>	3,590,604	2,926,876	663,728
<b>169 · RLF Loan Assets</b>			
170 · Juneau RLF Loans Receivable	409,383	680,139	(270,757)
170.1 · Haines RLF Loans Receivable	104,596	107,857	(3,261)
170.2 · USDA RLF Loan Receivable	262,238	285,934	(23,695)
170.3 · Childcare RLF Loans Receiva...	63,263	83,335	(20,072)
171 · Haines RLF Loan Loss Allowance	(9,000)	(9,000)	0
172.1 · JEDC Loan Loss Reserve	(47,448)	(47,448)	0
<b>Total 169 · RLF Loan Assets</b>	783,032	1,100,817	(317,784)
<b>169.2 · CBJ Covid 19 Loan Receivable</b>	229,665	768,772	(539,107)



**Juneau Economic Development Council**  
**Balance Sheet**  
As of January 31, 2023

	Jan 31, 23	Jan 31, 22	\$ Change
173 · Other Real Estate Owned	6,720	4,928	1,793
176 · Alaska Angel Investments	35,500	25,500	10,000
<b>Total Other Assets</b>	<b>4,645,521</b>	<b>4,826,893</b>	<b>(181,372)</b>
<b>TOTAL ASSETS</b>	<b>9,743,989</b>	<b>12,449,934</b>	<b>(2,705,945)</b>
<b>LIABILITIES &amp; EQUITY</b>			
<b>Liabilities</b>			
<b>Current Liabilities</b>			
Accounts Payable	27,567	22,101	5,466
Credit Cards	2,488	3,599	(1,111)
<b>Other Current Liabilities</b>			
208 · Accrued Property Taxes Paya...	1,011	0	1,011
210 · Due to (from) Programs	2,025	0	2,025
210.1 · Local Frequency Payable	10,896	11,975	(1,079)
213 · JCHH Dues Account	9,126	7,976	1,150
213.1 · JCHH Homeless connect	611	1,000	(390)
233 · Juneau Medical Respite Fund	15,319	0	15,319
240 · Payroll Liabilities	90,033	102,541	(12,508)
252 · Unearned Income	166,667	76,729	89,938
265 · Grants Payable			
265.1 · ARPA Grants Payable	2,087,328	5,402,696	(3,315,368)
265.3 · MACP Grants Payable	1,200,000	0	1,200,000
<b>Total 265 · Grants Payable</b>	<b>3,287,328</b>	<b>5,402,696</b>	<b>(2,115,368)</b>
<b>Total Other Current Liabilities</b>	<b>3,583,015</b>	<b>5,602,916</b>	<b>(2,019,901)</b>
<b>Total Current Liabilities</b>	<b>3,613,070</b>	<b>5,628,617</b>	<b>(2,015,546)</b>
<b>Long Term Liabilities</b>			
275 · Mortgage - Willoughby Ave	434,923	478,389	(43,466)
276 · Mortgage - Seventh St.	243,114	267,747	(24,633)
280 · Loan Payable to USDA IRP \$1M ...	146,959	188,590	(41,631)
290 · Haines RLF Loss Reserve Paya...	15,366	15,362	4
291 · Haines RLF Interest Payable	12,218	12,218	0
292 · Haines RLF Capital	92,500	92,500	0
294 · Child Care Centers Loan Program	143,220	150,000	(6,780)
296 · COVID 19 Loan Funding CBJ	275,000	850,000	(575,000)
<b>Total Long Term Liabilities</b>	<b>1,363,300</b>	<b>2,054,807</b>	<b>(691,507)</b>
<b>Total Liabilities</b>	<b>4,976,370</b>	<b>7,683,423</b>	<b>(2,707,053)</b>
<b>Equity</b>			
350 · JEDC Unrestricted Fund Balance	3,009,473	2,904,727	104,745
353 · RLF Unrestricted Fund Account	1,248,436	1,248,436	0
361 · Haines RLF Fund Balance	9,926	9,926	0
Net Income	499,784	603,421	(103,637)
<b>Total Equity</b>	<b>4,767,619</b>	<b>4,766,511</b>	<b>1,108</b>
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>9,743,989</b>	<b>12,449,934</b>	<b>(2,705,945)</b>

# JEDC Board of Directors

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**Katelyn Combs**

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**Alyson Cooper**

*STEM Program Manager*

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*Program Associate*



## Alaska Heat Smart

### Alaska Heat Smart FY24 Funding Request Summary

Alaska Heat Smart (AHS) is requesting a CBJ grant of \$235,094 for FY24. This increase of \$93,000 over last year is needed to accommodate rising public demand for our services, to meet the realities of growing costs, and to position Juneau to take advantage of future federal grant programs.

### The Need for Additional Funding

Over the past year, requests for AHS services offered to all Juneau residents have increased significantly. In addition to our advisory and home assessment services, our success in obtaining federal grants provides both financial incentives and related “healthy-home” upgrades linked to the installation of heat pumps in lower income households, broadening the reach of our offerings.

As our program offerings expand, we need appropriate growth in salaries and benefits. This is critical to both retain key staff, and recruit additional support. Administratively, it is also critical that AHS delivers rock-solid accounting and management practices to correctly administer federal grants.

To meet these current and near-term demands, staff hours must increase by almost 50% in FY24 (7488 hours vs 5000 in FY23). This includes increased time for energy advisors and heat pump assessments. It also reflects our increased public outreach and associated data management needs, expanding our administrative support position from part-time to full-time with commensurate benefits.

### AHS Program Impacts

AHS provides cost effective services that directly and significantly help the CBJ meet its affordable housing, climate, and renewable energy goals by supporting rapid adoption of heat pumps and related building efficiency measures. On average, of the 8500 Juneau households that heat primarily with oil, each one installing a heat pump reduces their annual household heating costs by \$1800, and carbon pollution by 6.9 tons (equivalent to taking 1.5 cars off the road for a year).

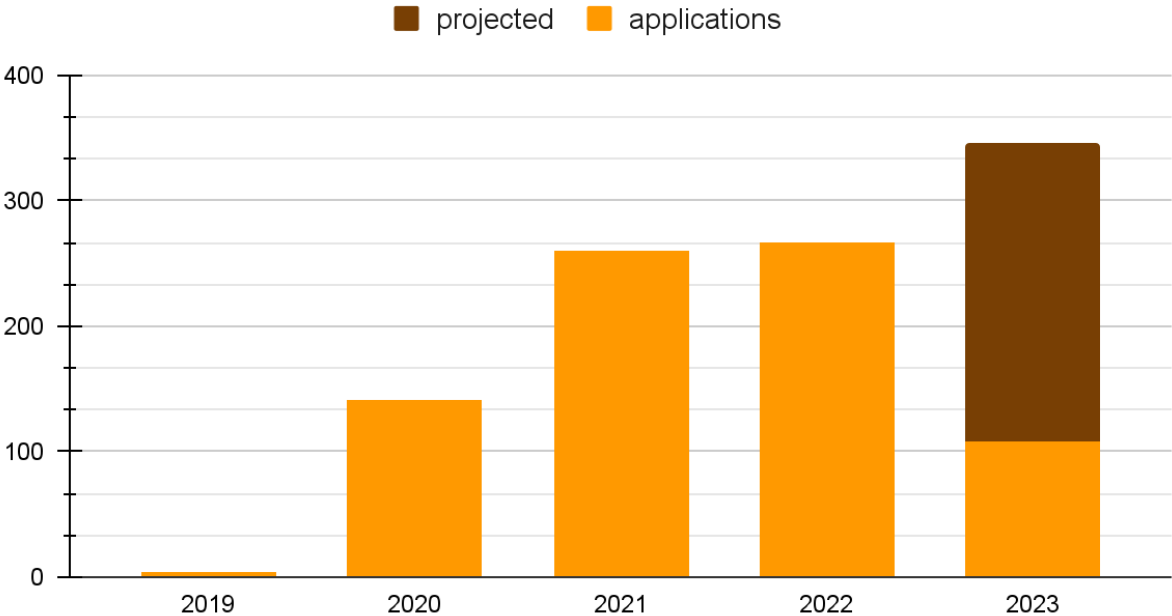
CBJ funding allows AHS to address major barriers to heat pump adoption, providing a path for individuals across the community to obtain the significant advantages of heat pump conversion. Our primary offerings include:

- Assessments:** Information and in-home heat pump assessments by our energy advisors give homeowners cost-effective options that fit their house and budget. AHS has provided energy efficiency education and heat pump advice to at least 1000 households, including 600 home heat pump assessments. At least 70% of assessed homes proceeded with heating system conversions.
- Grant Incentives:** New grant program incentives enable outreach to difficult to reach, lower-income households. So far the CBJ's investment in AHS has leveraged over \$3 million in federal and private funding, with \$2.5 million going to assist lower-income households. This expanded service provides equity in climate/energy improvements and cost savings to Juneau's most energy-burdened households. Over the coming year we expect new federal incentive programs that we hope to help Juneau residents benefit from.
- Information and Facilitation:** Alaska Heat Smart offers a range of information and packaging, providing a one-stop opportunity for homeowners interested in heat pumps. Services include referral of homeowners to advantageous heat pump loans through True North, providing private sector loans to Juneau households. AHS also shares information on technological advances with local installers, ensuring newer technologies are accelerated into Juneau housing. Finally, AHS shares information on federal incentives, tax credits, and potential rebates for homes and commercial buildings.

The Alaska Heat Smart program is providing major benefits to Juneau residents, with strong potential for even greater impact. The attached charts illustrate details of our staff and program expansion, and the rate of growth for assessments and new heat pump installations. We appreciate the CBJ's continuing financial support and consideration of a funding increase that provides a prudent way to leverage local resources to best advantage.

FY24	FTE Equivalent	% Time CBJ	Annual CBJ Hrs	% Time Grants
Executive Director	1	50%	1040	50%
Admin. Assistant	1	40%	832	60%
HH Program Manager	0.6	10%	125	90%
Chief Energy Assessor	0.4	80%	666	20%
Energy Assessor	0.25	75%	390	25%
New Energy Assessor	0.25	75%	390	25%
Bookkeeper	0.1	90%	187	10%

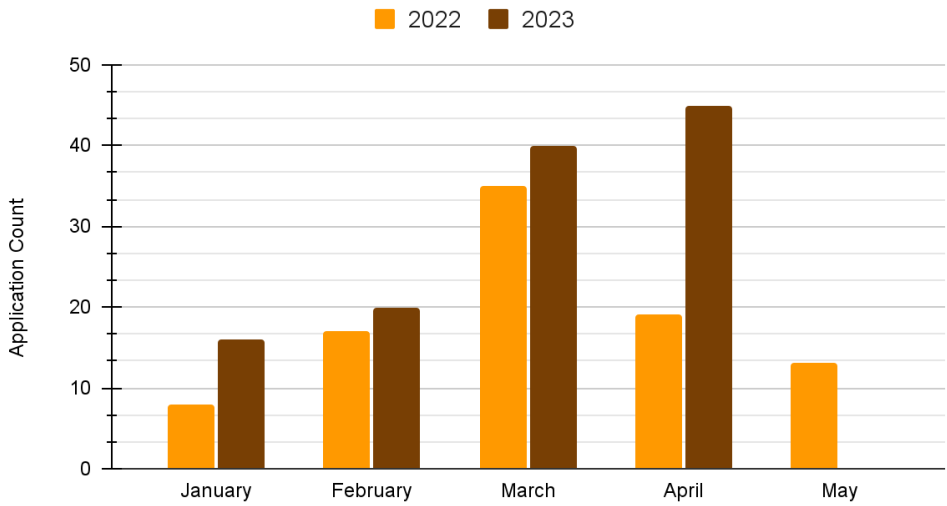
**Fig. 1: 2019-2023 AHS Assessment Applications**



**Notes: AHS Assessment Applications Chart**

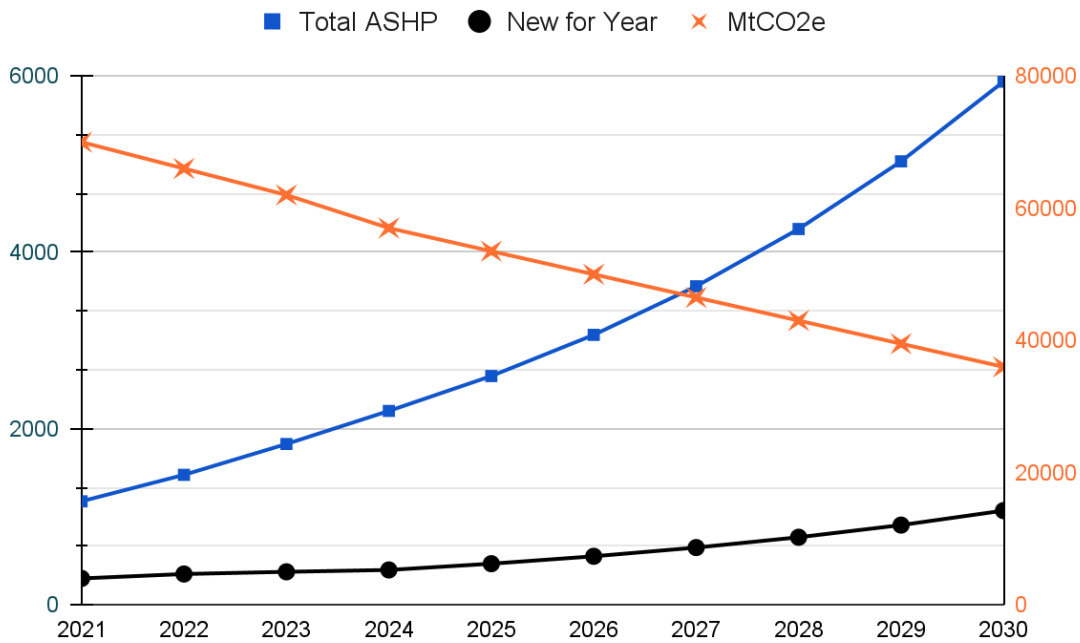
2019 - AHS began its assessment program at the end of 2019  
 2021 - 'Thermalize Juneau' significantly increased applications  
 2023 - AHS projects 346 applications by close of 2023 / 112 applications as of April 27, a 27% increase over 2022 as of this date

**Fig. 2: 2022 - 2023 Application Comparison**



**Note:**  
 April - July trends from 2020 - 2022 shows a monthly decrease. April 2023 applications have more than doubled over April 2022.

**Fig. 3 Scenario for Juneau Heat Pump Growth and GHG Reduction**



**Notes:** This projection is based on conservative estimates from 2021 and 2022 data. Pre-2023 installation estimates are derived from CBJ permit data, contractor records, AHS assessment data, and direct observation. Heat pump installations post 2022 are projected to increase at an annual rate of 18%. Continued year-over-year local and national support for heat pump adoption, fuel prices, and workforce changes may alter these projections. With 6000 heat pumps operating in 2030, Juneau would realize an annual avoidance of 33,911 metric tonnes of carbon dioxide, a reduction from 2021 total buildings emissions of almost half.



# Alaska Heat Smart

March 15, 2023

RE: Alaska Heat Smart FY24 Funding Request

Rorie Watt, Manager  
 City and Borough of Juneau  
 155 South Seward Street  
 Juneau, Alaska 99801

Dear Mr. Watt,

Alaska Heat Smart (AHS) requests a grant of \$235,094 in FY24 to meet rising demand for our growing slate of heat pump advisory and financial assistance programs and to catch up with the realities of our program costs. This FY24 request reflects several factors. Demand for our core services continues to grow significantly. The addition of new federally funded programs requires additional staff time and matching funding. And, as our program expands, we need to catch up on salaries and benefits in order to recruit and retain key staff.

Over the past year AHS has seen significant growth in demand for our advisory services available to all Juneau residents. We have added financial incentives and services for the installation of heat pumps and support of home health, broadening the reach of our offerings to lower income households. Developing federal incentive programs are creating additional interest and opportunities that may allow AHS to leverage new federal funding. To meet these current and future demands and expanding services, AHS projects that FY24 staff hours (7363 hours) will be nearly 150% of FY23 staff hours (5000). The FY23 CBJ grant has been used to support AHS operations for its core services and began to gear up on federal grant activities. AHS anticipates that it will fully expend the FY23 CBJ grant by 6/30/23.

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	AHS FY23		AHS FY24	
Personnel	\$	110,100.00	\$	211,494.00
Professional Services	\$	20,250.00	\$	11,502.00
Administrative	\$	7,000.00	\$	7,248.00
Advertising and Marketing	\$	4,100.00	\$	4,100.00
Supplies and Materials	\$	750.00	\$	750.00
Cash Flow Reserve	\$	108,000.00	\$	-
	\$	<b>250,200.00</b>	\$	<b>235,094.00</b>



## AHS Programs and Services

### Home Heat Pump Assessment Service

Our core 3rd-party advisory service both educates and empowers home and business owners to make informed decisions regarding energy efficiency measures for their primary space heating. AHS advisory reports combine a space's utility use history, a site visit, and number crunching with a custom energy calculator to generate options for moving forward with money-saving energy efficiency measures. They are a key to ensuring quality installations and consumer satisfaction. Many recipients of our services indicate that the report enabled them to make a decision to upgrade their home or business. The AHS home heat pump assessments are a direct benefit to contractors as they reduce administrative and educational responsibilities, allowing for greater efficiency in completing contracted work.

Since AHS' inception, more than 600 Juneau homes and businesses have received assessment services. 2022 and the first quarter of 2023 continue a four-year increasing trend, with record applications for heat pump assessment services - 290 assessment applications in addition to 100 new program applications over this five-quarter period. Preliminary analysis indicates that as many as 70% of program participants have moved forward with the purchase of a heat pump.

### Home Heat Pump Educational Services

In addition to heat pump assessments AHS staff provide information and advice over the phone, by email, on our website and through social media. The AHS website experienced rapidly climbing individual annual visits in 2022 - there were 6,522 unique individual visits to the AHS website and nearly 20,000 unique individual page views. AHS staff are increasingly asked to speak at events and meetings across the state, such as for the Alaska Forum on the Environment, the Alaska Energy Efficiency Partnership, and the recent Southeast Conference Mid-Session Summit.

### Healthy Homes Program (HH)

A 2022 \$2M, 42-month grant from the Department of Housing and Urban Development allows AHS to serve some of Juneau's neediest homes. Funds will remediate up to 90 lower income homes, improving electrical and heating systems, minimizing heat loss and moisture retention, and improving overall home health.

AHS is roughly one year into program start-up and has approved 16 homes, is processing 20 applications, and has moved another 12 applicants to other programs that match their eligibility. Work plans are being drawn up for local contractor work which is slated to begin by late March, 2023. AHS continues to maintain the separate cash flow reserve of \$108,000 granted by CBJ in FY23. This reserve ensures that bills are paid on time while waiting for HUD reimbursements.

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## Clean Heat Incentive Program (CHIP)

In the spring of 2022, AHS received a congressionally-designated spending (CDS) grant from the Department of Energy (DOE) courtesy of Senator Lisa Murkowski. This \$525,000 package (which includes a local foundation grant of \$50,000) is the basis of our Clean Heat Incentive Program (CHIP), a lower to modest income heat pump assistance program that will offer up to 200 homeowners a financial grant to partially pay for their initial investments in energy efficiency upgrades. With just a few months of active programming, AHS has paid seven incentives, with another 16 pending payments and 23 additional applications in process. We are also developing a pilot CHIP effort in Sitka using 10% of the federal CDS grant monies.

## Other Programs

### Thermalize Juneau Campaign

The Thermalize Juneau program (started in 2021 - 165 applicants, 145 energy assessments, 90 energy audits, and 75 heat pump installations) is nearly complete. AHS and partner organizations are completing the final deliverable of the program, a 'story map' guidebook that other communities can use to develop their own Thermalize program.

### True North Federal Credit Union Heat Pump Loan Program

Through March 9, 2023, True North FCU has provided 13 low interest heat pump loans to Juneau homeowners. The combined balance loaned is \$108,565. Currently, TNFCU is processing six new heat pump loans. In late 2022, AHS and TNFCU negotiated an increase in the loan cap from \$7,500 to \$12,500. No loans are delinquent and the original \$15K loan loss reserve established with CBJ funds in 2021 remains sufficient. AHS retains the additional \$25K reserve granted by the CBJ in FY22 to use for additional credit enhancements, if and when needed.

### Juneau Carbon Offset Fund Assistance

AHS continues to support Renewable Juneau's Juneau Carbon Offset Fund ("JCOF") program, conducting 14 home advisory assessments in 2022. JCOF has installed 37 heat pumps in lower income family homes and is currently processing five new applications. JCOF staff consider AHS home assessments a critical component of the applicant review process to ensure that income-qualified homes are of sound quality and able to reap the full benefits of a heat pump installation.

### Energy Data Analysis

AHS has nearly completed an analysis of our 2022 assessed homes. Of 165 assessments, not including nearly 150 from both the Thermalize program and the Juneau Carbon Offset Fund:

- Average oil space heating cost: \$3,048
- Average electric resistance heating cost: \$2,100
- Projected average savings from oil heat to heat pump: \$1,802

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- Projected average savings from resistance to heat pump: \$1,226
- 83% / 17%: ratio of assessed oil homes to assessed resistance homes
- Carbon output: pre-heat pump - 15,240 lbs
- Carbon output: post-heat pump - 1,484 lbs

AHS has been performing ‘reassessments’ of assessed homes to verify and crosscheck projected savings and impacts. This task is still in its early stages, but to date, 20 randomly selected homes first assessed in 2021 have had follow up assessments:

- 14 proceeded to install a heat pump (70%)
- 3 indicate that they are planning to install a heat pump (15%)
- 3 indicate that they will not be installing a heat pump (15%) - usually due to economics not justifying the cost
- Of the 8 oil users, 4 totally eliminated oil. The other 4 significantly reduced their oil usage.

Energy data analysis from a joint CCHRC, AELP, AHS study involving Thermalize Juneau homes and electrical data gathered by SENSE and TWACS meters is still ongoing with analysis currently unavailable.

## Looking Ahead: FY24

### AHS Staff Resources

AHS’ new Healthy Homes and CHIP programs, coupled with greatly increasing community interest in both heat pumps and general energy efficiency, have increased the workloads of AHS staff. Our half-time administrative assistant position will grow to full-time by late summer 2023. As demand for incentives and assessment services continues to grow, AHS anticipates hiring an additional part-time assessor to join the three part-time energy assessors currently on staff.

The AHS Board is considering the potential for additional sources of operating funds: To date, AHS’ services have been provided free of charge to all as a way to encourage participation and accelerate heat pump conversions in Juneau. Experience through the Thermalize Program suggests that some program participants have been willing to make donations to the Juneau Carbon Offset Fund in recognition of the valuable service AHS provided them. The AHS board is considering advertising a voluntary donation to AHS by program participants who are able.

While it is worthwhile to revisit efforts, our research to date into some foundations has not yielded opportunities to apply for the core operating funds AHS needs to execute its programs.

### Exploring Regional Expansion

In conjunction with the developing Sitka CHIP program, AHS hopes to use the DOE-funded Sitka CHIP as a catalyst to develop a Sitka home heat pump assessment

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program, as an arm of our core Juneau service. The CHIP grant will train a Sitka-based AHS assessor, and discussions are underway with the City and Borough of Sitka (CBS) about potential CBS funding for the wage and administrative costs of this assessor position.

CBJ funding is not being used for the Sitka-based work. It is important to note that developing a regional workforce of heat pump assessors and installers could provide mutual benefits for each community. AHS will continue to explore opportunities for expanding its services regionally, including those related to the state's implementation of the IRA rebate program.

### **Inflation Reduction Act Implementation**

AHS regularly shares information about the Inflation Reduction Act's (IRA) generous federal tax credits, available in 2023, with home and business owners across Alaska. We are planning new public outreach programs about the pending income-qualified rebates expected to become available in early 2024. Our advisory services will help Juneau residents take full advantage of these complex new opportunities. AHS' trusted contractor relationships and locally-recognized reputation and services will be valuable assets that will ensure that those who can benefit most from IRA rebates and tax credits will both understand their options and have access to them.

Additionally, AHS has begun a dialog with AHFC, which is developing a state program to administer IRA rebate funding in early 2024. Depending on how the state program is structured, there may be new opportunities for financial support and expansion of AHS services. Finally, the IRA provides some separate new grant opportunities that AHS may be able to qualify and apply for. We will be tracking these as they develop and become available.

AHS continues to explore ways to support conversions to heat pumps in multi-family rental properties and will be tracking and helping landlords take advantage of the new incentives in the IRA.

AHS staff FY24 hours covered by all funding sources are estimated below. These sources of funding include the HUD Healthy Homes grant, the DOE CDS grant for our CHIP program, independently-secured foundation contributions, and private

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donations. AHS' FY24 CBJ grant request takes into account these other sources of funding, which significantly lowers AHS' request of the CBJ for the operating funds necessary to execute AHS programs and services.

AHS Staff	FTE	% CBJ	% Grants
Executive Director	1	50	50
Administrative Assistant	1	40	60
Program Manager	0.58	10	90
Chief Energy Assessor	0.38	80	20
Energy Assessor	.25	75	25
New Energy Assessor	.25	75	25
Bookkeeper	.08	90	10
<b>Total Hours</b>	<b>7363</b>	<b>3555</b>	<b>3808</b>

The CBJ's investment in AHS is paying dividends for Juneau residents. AHS' success helps reduce annual heating costs for hundreds of Juneau residents. New installations support existing and new local jobs, keeps money from energy savings circulating in the local economy, and is attracting millions of dollars into Juneau's economy to improve the quality of Juneau's housing stock. Through its support for AHS, the CBJ makes a substantial contribution toward meeting the community's goals of reducing greenhouse gas emissions and dependence on fossil fuels.

We appreciate the CBJ's continued financial support. Please find attached profit and loss statements for FY23 through Feb 28, 2023.

Steve



Steve Behnke, President  
Alaska Heat Smart Board of Directors

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**Alaska Heat Smart  
Profit & Loss by Class  
July 2022 - February 2023**

	<u>Total</u>
<b>Revenue</b>	
1040 Local Revenue	
1041 CBJ Income	127,903.86
<b>Total 1040 Local Revenue</b>	<b>\$ 127,903.86</b>
1041.0 Federal Revenue	
1041.1 HUD Healthy Homes Income	43,540.86
1041.2 CDS Murkowski	33,286.28
<b>Total 1041.0 Federal Revenue</b>	<b>\$ 76,827.14</b>
1055 Service/Fee Revenue	1,050.00
1060 Other Revenue	
1062 Project Income	650.00
1063 Interest Earned	420.85
1064 CCHRC Match	23,661.00
1065 Admin Match	0.00
1066 Donations (AHS)	100.00
<b>Total 1060 Other Revenue</b>	<b>\$ 24,831.85</b>
Billable Expenditure Revenue	240.00
<b>Total Revenue</b>	<b>\$ 230,852.85</b>
<b>Cost of Goods Sold</b>	
1998 Cost of Goods Sold	
1999 QuickBooks Payments Fees	4.50
1999.1 Paypal processing fee's	8.94
<b>Total 1998 Cost of Goods Sold</b>	<b>\$ 13.44</b>
<b>Total Cost of Goods Sold</b>	<b>\$ 13.44</b>
<b>Gross Profit</b>	<b>\$ 230,839.41</b>
<b>Expenditures</b>	
2000 Personnel Expenses	
2000.0 Executive Director	53,316.39
2001 Energy Advisor	9,955.74
2001.1 Program Coordinator	23,525.44
2001.2 Financial Manger	4,473.46
2001.3 Program Tech	36,278.05
2001.4 Admin Assistant	9,398.26
2001.8 Employee Bonus	544.73
Taxes	0.00
<b>Total 2000 Personnel Expenses</b>	<b>\$ 137,492.07</b>
2100 Fringe Benefits	
2002 Taxes	12,585.76
2003 Payroll Processing	928.00
2004 Workers Comp	512.60
<b>Total 2100 Fringe Benefits</b>	<b>\$ 14,026.36</b>
3010 Supplies	
3011 Supplies specific	3,427.00
3012 Supplies reallocate	548.55
3014 Software	300.00
<b>Total 3010 Supplies</b>	<b>\$ 4,275.55</b>
3020 Administrative Expenses	
1161 Credit Card Processing	5.47
3023 Memberships / Dues	1,141.40
3026 Business Meetings	121.74
3028 Printing & Copying	103.00
3029 IT / Website	35.54
3029.1 Training	450.00
<b>Total 3020 Administrative Expenses</b>	<b>\$ 3,486.94</b>
3021 Promotions	
3021.2 Advertising & Marketing	83.99
<b>Total 3021 Promotions</b>	<b>\$ 83.99</b>
3030 Bank Charges	
	2.50
3040 Legal & Professional Fees	
3041 Contractor	2,400.00
3044 Broker / Professional	175.00
3045 Incentive Payments (contractual)	15,500.00
<b>Total 3040 Legal &amp; Professional Fees</b>	<b>\$ 18,075.00</b>
3040.1 Subawardee	
3040.11 Personnel	17,905.50
3040.15 Indirect costs / de minimis	1,567.80
3040.16 Subawardee Personnel (Match)	22,648.50
3040.17 Indirect costs (match)	1,012.50
<b>Total 3040.1 Subawardee</b>	<b>\$ 43,134.30</b>
3050 Travel	
3051 Admin Travel	965.89
3053 Special Projects Travel	1,312.31
<b>Total 3050 Travel</b>	<b>\$ 2,278.20</b>
3060 Utilities	
3061 Telephone	477.00
<b>Total 3060 Utilities</b>	<b>\$ 477.00</b>
4000 Insurance Expense	
4002 Directors & Officers	989.36
4003 Liability	1,299.68
<b>Total 4000 Insurance Expense</b>	<b>\$ 2,289.04</b>
<b>Total Expenditures</b>	<b>\$ 225,620.95</b>
<b>Net Operating Revenue</b>	<b>\$ 5,218.46</b>
<b>Other Expenditures</b>	
7000 Other Direct expenses (Grant)	4,951.25
8003 Grant Recovery exp. Operating OH	0.00
<b>Total Other Expenditures</b>	<b>\$ 4,951.25</b>
<b>Net Other Revenue</b>	<b>-\$ 4,951.25</b>
<b>Net Revenue</b>	<b>\$ 267.21</b>



April 24, 2023

Dear Juneau Assembly Members,

The Juneau Nordic Ski Club (JNSC), a local 501(c)(3) nonprofit, is in the midst of a capital campaign to purchase new ski trail grooming equipment. As we strive to meet our community's growing appetite for cross country skiing, the JNSC is actively working to expand the number of skiable kilometers throughout the borough. Our ability to accomplish this goal, however, hinges upon updating and expanding our existing fleet of grooming equipment.

To that end, **we are requesting \$25,000 of CBJ support towards replacing and expanding our snow grooming equipment.**

The need is pressing. With the Montana Creek bridge out of commission this past winter, the JNSC initiated regular trail grooming up Salmon Creek as a replacement. Thanks to the popularity of this new location, and the likelihood that Montana Creek will be back next winter, the JNSC is planning to keep both trails in the regular grooming rotation. This means that in addition to regularly maintaining snow on Pioneer Road, Salmon Creek Road, and the Mendenhall Lake and Campground (not to mention the supplementary service we provide at Eaglecrest and other "pop up" grooming locations around the borough), the JNSC **will be grooming more kilometers than ever before!**

All of this requires new equipment that doesn't break down as often, and more of it. The total cost to replace one of our aging snow machines alongside the purchase of an additional full set of grooming equipment (machine, grooming implements, trailer), is north of \$75,000. We have several grant requests pending, will be asking our members for support, and are prepared to dip into our Emergency Equipment Fund to support this effort. However, municipal support for this project is key to the success of this campaign.

Funding from CBJ for this project is appropriate and significant: it signals to funders that there is broad, local support for this project. Rasmuson Foundation, for example, has asked for us to demonstrate community buy-in for this project ahead of any formal grant application. CBJ support, coupled with locally fundraised dollars from JNSC members and business sponsors, are critical leverage for additional outside grantors like Rasmuson Foundation. Plus, given that **three of the four trails we regularly groom are on, or accessed via, CBJ lands, and the sheer volume of Juneau citizens benefiting** from the services we provide, financial support will arguably be the most economical investment in community health and wellness the city can make!

That's because cross country skiing makes Juneau a great place to live in the winter. We take care of ourselves, our friendships, and raise our families on our trails. While our snow grooming services are funded entirely by our 800-1,000 annual dues-paying members, the benefits of these services are available to all Juneau residents (skiers, walkers, snowshoers, and bikers) free of charge. Investments in local recreation, like cross country skiing, also carry significant economic benefits to Juneau. Like





good schools, smooth roads, and clean water, opportunities to recreate outdoors attract the next generation of young professionals and families who decide to make Juneau their home.

From grooming agreements to master planning, CBJ has been an indispensable partner in making cross country skiing possible throughout our borough. With future trail development proposed in the Mendenhall Glacier Recreation Area, Montana Creek Valley, Spaulding Meadows, and the Cropley Lake meadows at Ealgecrest, CBJ's collaboration and support for Nordic skiing will only become more important as we expand our services to the benefit of Juneau residents.

A project budget has been attached. If you need additional information or have questions, please don't hesitate to contact the JNSC Business Manager, Tristan Knutson-Lombardo.

Thank you for considering this request. We wish you good health, fellowship, and fresh corduroy next winter!

On behalf of the JNSC Board of Directors,

Tristan Knutson-Lombardo  
JNSC Business Manager  
907-723-1772, [info@jnski.org](mailto:info@jnski.org)

**JNSC Board of Directors**

- |                                     |                                 |                       |
|-------------------------------------|---------------------------------|-----------------------|
| <i>Frankie Pillifant, President</i> | <i>Kate Slotnick, Secretary</i> | <i>Jordan Tanguay</i> |
| <i>Mike Hekkers, Vice President</i> | <i>Fred Hiltner</i>             | <i>Odin Brudie</i>    |
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|                                     | <i>Wayne Carnes</i>             |                       |





## 2023 JNSC Grooming Equipment Campaign Budget

Equipment	Cost	Vendor
2023 Can-Am #1	\$28,000.00	Broken Rudder, shipping included
84" Ginzu and Roller	\$13,200.00	Yellowstone Track Systems, shipping estimate included
Trailer	\$6,100.00	Ideally locally sourced, may have to ship from Lower 48
2023 Can-Am #2	\$28,000.00	Broken Rudder, shipping included
	\$3,765.00	5% contingency
	<b>\$79,065.00</b>	

Income Source	Amount	Status/Notes
AARP Community Grant	\$13,200.00	applied, pending
Rasmuson Foundation	\$25,000.00	applying after securing local support
CBJ	\$25,000.00	pending
JNSC Members, Local Business Support, JNSC reserves	\$17,000.00	secured
	<b>\$80,200.00</b>	

**Increments Included in Manager's Proposed Budget****Information Technology – Business Analyst Position****\$133,500 GF (\$133,500 P/S) & 1.00 FTE**

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The IT Division requests funding for a full-time business analyst. This position will work with all departments to identify business needs, analyze data to identify problems or inefficiencies, define requirements, and ensure that technology and processes are aligned with city goals. They will monitor and measure the effectiveness of the city's implemented solutions and provide ongoing support to ensure that they continue to meet the city's needs. This position will also be involved in project management activities related to the city's application and process upgrades.

**Information Technology Upgrades****\$513,500 GF (\$513,500 Comm/Serv)**

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The FY24 budget proposes a \$513,500 increment for information technology upgrades. The Information Technology Department has implemented significant modernization efforts across various systems and requests funding to continue and expand those endeavors. These upgrades include transitioning to Microsoft 365 to improve collaboration and communication capabilities and a restructuring of our Adobe licensing to align with licensing standards and gain improvements in the e-signature process. Additionally, our cyber security portfolio has been fortified with the addition of multi-factor authentication and advanced monitoring and automated response systems.

**Finance – Commercial Appraiser Position****\$119,000 GF (\$119,000 P/S) & 1.00 FTE**

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Finance's Assessor's Office requests funding for a full-time commercial property appraiser. For over a decade, the Assessor's Office has lacked quantity and quality of commercial data, and implementation of equitable market value assessments, which in turn placed a larger tax burden on residential property owners and a relatively low tax burden on commercial property owners. The Assessor's Office was able to bring assessment levels closer to equity in recent years, but they need more resources to refine commercial assessment models to bring all property types to market value. The incumbent for this new position would be responsible for developing studies for data collection, conducting special studies, and performing outreach to commercial property owners in order to build a functioning commercial valuation model and process. With the repeal of mandatory disclosure it is even more crucial for a commercial appraiser to develop relationships with commercial real estate owners and operators, and solicit for local data to work around our unique situation here in Alaska.

**Human Resources – Human Resources Consultant & Technician Positions****\$133,500 GF (\$133,500 P/S) & 1.00 FTE**

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The Human Resources and Risk Management Department is seeking approval of an additional 1 FTE in the form of two .5 FTE increases to preexisting positions. The first .5 FTE increases a current part time human resources consultant position to full time. With the current state of the labor market and the manner in which workforce demographics are changing into the future, the HR consultant workload at the CBJ has increased and will likely remain higher into the foreseeable future. Increasing the HR consultant position to full time will allow the HRRM do be more responsive to other departments' employee relations, position classification, and workforce planning needs and will help improve recruitment and retention. The second .5 FTE increase is to change a full-time HR technician position that is currently allocated evenly between HR and Risk Management to a full time position for HR support. This change is being made to better support both the HR and Risk Management functions of the CBJ.

**Parks and Recreation – ZGYC Recreation Coordinator Position****\$67,200 GF (\$67,200 P/S) & 1.00 FTE**

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The Parks & Recreation Department requests funding for a recreation coordinator position at the Zach Gordon Youth Center (ZGYC). Community demand for youth sports has increased significantly since before the pandemic. All of ZGYC's youth sports programs are currently managed by one Recreation Coordinator II, who recruits, trains, and manages over 120 volunteers. These volunteers contribute over 1,500 hours of time annually, valued at over \$47,000. This position would allow us to serve additional children by increasing our Start Smart offerings. The Recreation Coordinator II position is currently over extended and does not have capacity to add new programming of any kind. It would also improve oversight of volunteers during practices, provide backup for referees as needed, help recruit more volunteers, and support expanding partnerships like the Native Youth Olympics into the youth sports.

**Parks and Recreation – Treadwell Recreation Coordinator Position****\$15,000 GF (\$15,000 P/S) & 0.16 FTE**

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Parks and Recreation is requesting to increase the Recreation Coordinator II position at Treadwell Arena from a 0.84 FTE to a 1.00 FTE in order to utilize the facility year-round. Year-round use of the facility will increase revenue and help meet growing community demand for activities like pickle ball, floorball, and roller-skating. This request will also provide a smoother transition between ice season, which have extended to over nine months per year to meet demand by user groups. Staff estimates that 40% of the cost of increasing this FTE to full-time will be offset by increased user fees for programs and activities in the first year, growing to 50% to 65% in the second and third years.

**Parks and Recreation – Aquatic Instructor Positions****\$24,000 GF (\$24,000 P/S) & 0.60 FTE**

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In order to better meet community need, the Parks and Recreation Department is requesting funding to add four part-time limited swim instructor positions to the Aquatics budget. This increased capacity will allow us to better meet strong demand for swim lessons, summer camps, and water safety programming at Juneau’s pools. These positions also support the Assembly’s goal of improving access to childcare, particularly when school is out of session. These positions will also support a focus on providing services to homeschool families. Due to pandemic-related closures and limited staffing, swim lessons have been very limited since 2020, resulting in tremendous pent up demand. In 2022, every available slot for swim lessons was taken within a few minutes of opening registration. As the only operator of pools in a maritime community surrounded by water, CBJ has a responsibility to provide these lifesaving skills, as well as to enhance water safety education and support healthy lifestyles among our community’s young people. Swim lessons are revenue-positive for the department.

**RecycleWorks – Household Hazardous Waste****\$100,000 GF (\$100,000 Comm/Serv)**

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The Engineering & Public Works (EPW) RecycleWorks budget includes a \$100,000 increase for the FY24 Household Hazardous Waste Facility Management and Processing Services. Clean Harbors Environmental Services provides hazardous waste service to residential, commercial, governmental, and nonprofit entities within the City & Borough of Juneau. In FY23, CBJ issued a new Request for Proposal (RFP) and awarded the contract to Clean Harbors. Costs were significantly higher than the previous FY17 awarded contract (disposal rates: FY22 \$0.62 per lb., FY23 \$0.84/lb.). EPW FY24 budget will require an additional \$100,000 to ensure sufficient funding for the program.

**Fleet Replacement****\$527,900 GF (\$527,900 Cap Outlay)**

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The budget includes \$527,900 of new funding for departmental fleet contributions—which is how CBJ pays for all fleet vehicles and other durable equipment, particularly for police and fire. Vehicle and equipment replacement costs have been significantly impacted by inflation, high demand, and short supply. This increment is necessary in order to maintain CBJ’s aging fleet and mitigate rising vehicle and equipment maintenance costs.

**Public Defenders****\$230,000 GF (\$230,000 P/S) & 2.0 FTE**

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Historically CBJ has provided public defender services for misdemeanor offenses (felony offenses are handled by the State) by contracting with local private attorneys. CBJ's current public defender is moving on and we have received no responses from private attorneys or firms interested in providing PD services. This increment will add to the existing PD budget (new total: approximately \$410,000, not including conflict services) and will allow us to hire two full-time attorneys to provide public defense services. These attorneys will report to the Manager. An additional appropriation may be necessary depending on the outcome of office space requirements & negotiations for these positions.

**Assembly Grant – AEYC Operations****\$75,000 GF (\$75,000 Grants)**

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During the FY23 budget process, AEYC requested "two-time" operational funding from the Assembly to stabilize its operations after the loss of one of its major historical grants. This increment represents the second year of that request, at a lower amount (the FY23 approved amount was \$102,000). Further, AEYC requested a \$141,000 Assembly Grant in FY23 for Parents as Teachers which was returned, as they were able to secure other funding for the program.

**Warming Shelter****\$100,000 GF (\$100,000 Comm/Serv)**

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The Manager's Proposed Budget includes a \$100,000 increase for FY24 Warming Shelter services. Resurrection Lutheran Church (RLC) operated the warming shelter in FY23 and saw a steep rise in use. The contract is scheduled to be re-bid for FY24 and the Manager's Office is engaged with providers to determine scope of work, location, and joint coordination efforts. This increment will bring the total funding available for these services to \$300,000, some portion of which will be used for space planning and/or renovations. Space for these services is currently tenuous – it is unknown whether RLC will be an option next winter and staff are exploring the possibility of converting the part of the Thane Warehouse not used for the Ballot Processing Center. Using the Thane Warehouse would require specific Assembly-level legislative action to override zoning requirements – at this point, it seems probably this may be our most appealing option for next winter.

**Manager’s Proposed Budget Amendments**

**Human Resources – Human Resources & Risk Management Director  
\$95,430 GF (\$95,430 P/S) & 0.40 FTE**

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The Manager’s Office is seeking approval of an additional 0.4 FTE to the CBJ side of the HRRM Director position, currently shared between CBJ (0.4 FTE), the Risk Fund (0.2 FTE), and Bartlett Regional Hospital (0.4 FTE – the portion we are seeking to transfer). A shared services agreement was adopted by the BRH Board of Directors and the CBJ Assembly in 2013. With changing hospital direction and increasing demands on CBJ HRRM workloads, we are seeking to return to the pre-shared services agreement environment. Each organization would benefit from a fully-dedicated high level executive focused on its needs. If this increment is approved, the current shared services environment would remain through the end of the fiscal year, affording time for the hospital to adapt. The CBJ HRRM director, similar to executive staff in the Manager’s Office and Finance Department, would maintain a collegial relationship with the BRH HR Director, serving within each other’s professional network.

**Parks and Recreation – Juneau Trails Plan  
\$80,000 GF/ST (\$80,000 CIP)**

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Juneau’s existing Trails Plan was completed in 1993. A new Juneau Trails Plan, started by CBJ, the USFS, Alaska State Parks, and Trail Mix in 2019, is partially complete. Staff resources were directed elsewhere during the pandemic and CBJ has not had the capacity to staff the project since. If there is a desire to complete this plan in the near term, a consultant would likely need to be hired. Staff estimates the cost of completion at \$60,000-\$80,000.





# MEMORANDUM

**DATE:** December 19, 2022  
**TO:** Chair Bryson and Public Works and Facilities Committee  
**THROUGH:** Katie Koester, Engineering and Public Works Director  
**FROM:** Denise Koch, Engineering and Public Works Deputy Director & Rich Ross, Capital Transit Superintendent  
**SUBJECT:** Capital Transit: Fare Free Exploration

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## Background

Many locations across the country have asked the following question:  
If transit is a public good, should it be free?

This brings the associated questions of where the revenue should come from to plug the hole and what it would mean for ridership.

According to the American Public Transportation Association, there are only about 25 fare-free systems of thousands of transit systems nationwide.<sup>1</sup> Most of the fare-free systems are bus only systems. These systems include some large urban areas (i.e. Kansas City<sup>2</sup>) as well as mid-size cities (i.e. Missoula, MT, Olympia, WA), college towns (i.e. Corvallis, OR, Chapel Hill, N.C.), and resort communities (i.e. Breckenridge Free Transit System, CO, Advance Transit, NH/VT, Commerce, CA). In Alaska, Glacier Valley Transit in Girdwood and Sunshine Transit in Talkeetna are free. These are much smaller systems than what Capital Transit operates.

Some of the more prominent examples are the Kansas City Area Transportation Authority and the Boston system, which made three bus routes fare-free using COVID related funding. It is not yet clear whether those systems will remain fare free after COVID funding expires. Connecticut made all public transit buses fare-free through March 31, 2023.<sup>3</sup> Olympia Washington has a zero-fare demonstration project that may last until as late as January 1, 2028. On December 7, the Washington D.C. Council voted to waive the \$2 fares for Metrobus riders within city limits starting on July 1, 2023.<sup>4</sup>

Some of the positives associated with fare-free include greater economic equity, greater speed on boarding buses, and reduced conflict between drivers and passengers over fares; some of the negatives

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<sup>1</sup> “Public Transportation Fare Database, 2019” American Public Transportation Association  
<https://www.apta.com/research-technical-resources/transit-statistics/fare-database/>

<sup>2</sup> ZeroFareKC <https://zerofarekc.com/>

<sup>3</sup> “Suspension of Bus Fares Statewide continues through March 31, 2023,”  
<https://www.cttransit.com/news/suspension-bus-fares-statewide-continues-through-march-31-2023#:~:text=The%20Connecticut%20Department%20of%20Transportation,Connecticut%20through%20March%2031%2C%202023.>

<sup>4</sup> “Washington D.C. is making public buses free forever,” Fortune, December 12, 2022.  
<https://fortune.com/2022/12/12/washington-dc-making-public-buses-free-forever/>

included some rowdy riders and a greater number of unsheltered people riding the buses all day.<sup>5 6</sup> Additionally, surveys completed by transit researchers have indicated that riders prioritize frequent reliable service over eliminating fares. They caution about moving to fare-free if the reduced revenue sacrifices service.<sup>7</sup> One other consideration for Juneau would be that cruise tourists often swamp the Downtown Transit Center during the summer looking for a low cost way to get to the Glacier. Free rides would further increase that traffic to the beginning of the routes, displacing locals.

One international study showed that access to fare-free transportation increases the total number of off-peak trips that existing passengers take for leisure or errands, but did not have an impact on the number of trips people take via car.<sup>8</sup>

**Capital Transit - Funding**

In FY 22, Capital Transit’s operating actual expenditures were \$6,852,100. Of that total, only \$463,883 (~ 7% of the operating budget) is collected in fares. Fare revenue includes one-time fares collected in the fare box (i.e. \$2 per adult, \$1 per youth) as well as from tokens and passes.

We estimate that Capital Transit spends almost \$20,000 per year of the revenue to collect and process the fares. Other CBJ departments such as Finance, Cash Office, and Libraries also spend time associated with fare collection and pass sales.

Capital Transit – FY22 Operating Budget		
Agency	Source	
CBJ	General Funds	\$5,167,596
Federal Transit Administration*	5311	\$1,220,621
Cash/Passenger Sales		\$ 224,913
Pass Sales		\$ 195,590
Token Sales		\$ 43,380
<b>Total</b>		<b>\$6,852,100</b>

\*Received via Alaska Department of Transportation & Public Facilities

It is also worth noting that there are currently approximately 3,000 residents with permanent or temporary disabilities who have VIP or ADA cards that enable them to already ride for free. Senior citizens with local sales tax exemption cards and children under 5 also currently ride free. Riders who receive free rides make up a significant portion of the Capital Transit ridership.

<sup>5</sup> “Buses Shouldn’t Be Free,” The Atlantic, December 9, 2022 <https://www.theatlantic.com/ideas/archive/2022/12/washington-dc-free-bus-transit/672407/>  
<sup>6</sup> “Free buses are a money saver. Riders say they’re still too slow.” The Washington Post. December 10, 2022 <https://www.washingtonpost.com/transportation/2022/12/10/fare-free-bus-service-transit/>  
<sup>7</sup> “Who’s On Board 2019: How to Win Back America’s Transit Riders,” Transit Center. [https://transitcenter.org/wp-content/uploads/2019/02/TC\\_WhosOnBoard\\_Final\\_digital-1-1.pdf](https://transitcenter.org/wp-content/uploads/2019/02/TC_WhosOnBoard_Final_digital-1-1.pdf)  
<sup>8</sup> “The impact of fare-free public transport on travel behavior: Evidence from a randomized controlled trial,” Regional Science and Urban Economics, Vol. 86, January 2021 <https://www.sciencedirect.com/science/article/abs/pii/S016604622030301X>

If Capital Transit were to go fare free without replacing the lost revenue, it would result in service reductions. This would most likely result in permanent cuts to the North Douglas Route 11, Route 5 that includes service to the University and Glory Hall, and Route 6 which provides service to Riverside Drive and the airport. (These routes are currently temporarily suspended due to the driver shortage. We planned to reinstate service once we are more fully staffed.)

Recommended discussion

Are there additional questions or areas that the Committee wants staff to research?

# TRANSIT

## COMPARATIVES

	FY22 Actuals	FY23		FY24	
		Amended Budget	Projected Actuals	Approved Budget	Revised Budget
<b>EXPENDITURES</b>					
Personnel Services	\$ 4,373,800	4,749,700	4,593,500	4,568,700	5,007,300
Commodities and Services	2,478,300	2,828,100	2,854,600	2,893,000	3,124,900
<b>Total Expenditures</b>	<b>6,852,100</b>	<b>7,577,800</b>	<b>7,448,100</b>	<b>7,461,700</b>	<b>8,132,200</b>
<b>FUNDING SOURCES</b>					
Charges for Services	449,700	483,300	513,200	483,300	506,300
Donations and Contributions	3,300	-	-	-	-
State Grants	1,220,600	1,113,600	2,136,000	1,113,600	1,106,700
Support from:					
Roaded Service Area	5,178,500	5,980,900	4,798,900	5,864,800	6,519,200
<b>Total Funding Sources</b>	<b>\$ 6,852,100</b>	<b>7,577,800</b>	<b>7,448,100</b>	<b>7,461,700</b>	<b>8,132,200</b>
<b>STAFFING</b>	<b>39.98</b>	<b>39.68</b>	<b>39.68</b>	<b>39.68</b>	<b>39.68</b>

### FUND BALANCE

The Transit Division is a component of the Roaded Service Area. See the Roaded Service Area fund balance in the "Changes in Fund Balances" schedule.

## BUDGET HIGHLIGHT

The FY24 Revised Budget shows an increase of \$670,500 (9.0%) from the FY24 Approved Budget.

### The significant budgetary changes include:

#### FY24 Revised Budget

- Personnel services increased \$438,600 (9.6%) primarily due to negotiated wage and merit increases.
- Commodities and services increased \$231,900 (8%) primarily due to the inflationary impact on fuel.



DATE: May 3, 2023  
TO: Carole Triem, Chair Assembly Finance Committee  
THROUGH: Katie Koester, Director Engineering and Public Works  
FROM: Jeanne Rynne, Chief Architect  
Greg Smith, Contracts Administrator  
SUBJECT: Current Bid Climate

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### Executive Summary

Following some bids that came in significantly over the professional estimate, CBJ Engineering reached out to the contractor community to gain a better understanding of the current construction climate and to ascertain what CBJ may be able to do to improve bid results and to attract bidders to CBJ projects. Challenges in the Juneau market continue to include material escalation and long lead times for equipment and labor scarcity. Additionally, the business of the private sector, with more flexible procurement methods, makes bidding public work less attractive.

### Background

On February 23, 2023, CBJ Purchasing opened two bids: the Eagle Valley Center (EVC) Energy Efficiency Upgrades and Outer Drive Pump Station. There were two bidders for the EVC project; the low bidder was 1.7 times the professional estimate and the high bidder 1.8 times the estimate. There were two bidders for Outer Drive, the low bidder was 1.5 times the estimate and the high bidder 1.6 times the estimate. The bidding climate has forced CBJ to make difficult decisions and prioritize critical infrastructure: for example, the Assembly transferred funds to complete the lift station whereas the EVC project is being rebid at a reduced scope.

Other recent bid results include

- BRH Administration Building Exterior Rehab, opened 3/8/23, had one bidder at 1.8 times the estimate.
- ZGYC Boiler, opened 4/11/23, had one bidder at "only" 1.26 times the estimate.
- Treadwell Roof Rebid, opened 7/26/22, had four bidders ranging from 1.4-1.7 times the estimate.

As the high bids have tended to be related to vertical construction, CBJ Engineering contacted the seven general contractors that have historically bid on CBJ vertical projects. Four of the seven contractors responded to our request for feedback on the current bid climate. Feedback from contractors is summarized on the attached document.

### Conclusion

CBJ can work to control costs by normalizing the use of alternative procurement and changes to project labor agreements to accommodate the current labor shortage. However, the reality is we are still in a volatile bid climate and will likely continue to see bids coming in above estimates. This will force CBJ to prioritize critical projects, put others on hold, and/or be able to appropriate additional funds to accomplish the projects we have planned.

Enc:

Chart: Percentage of Low Bid Award Above Estimate (2018-2023)  
Summary of Contractor Feedback on Cost Escalation

## Summary of Contractor Feedback on Cost Escalation

### Material Pricing, Projected Escalation

- Prices are dropping on wood products and metals.
- Concrete prices may be going up in Juneau.
- Forecasting 5%-6% escalation this coming year compared to 8-9% this past year.
- Roofing suppliers are reluctant to lock in prices, particularly on petroleum based products.

### Estimating

- Professional estimators are coming in low.
- Less consultant outreach to local contractors when estimating than in the past.
- Contractors having difficulty generating good "square foot" estimates in today's market.
- Anchorage estimators are not taking into account freight to Juneau.
- Have observed professional estimates (Anchorage based) coming in low for other parts out of Alaska as well.
- Estimators are behind on material pricing.
- Estimating rule of thumb used to be 50% materials/50% labor; now more common to see 60%-70% materials/40%-30% labor.
- Estimators are missing the compounding of mark-ups with multiple tiers of subcontractors.
- Design clarity: projects with fewer uncertainties will get more attention.

### Labor

- Labor is scarce, both in the trades and project management.
- Labor issue is exacerbated on projects requiring PLA.
- Local Carpenter Union Hall in Juneau has closed, contractors having to import workers from Anchorage or out of state.
- Aging workforce, not many new workers going into the trades, young people coming into trades expecting high starting wages with lower ambition.
- High turnover for new hires.
- Having to pay more for less skilled and less available labor
- Latest prevailing wage rate schedule from DOL (April 2023) is significantly higher than the last one (September 2022) ranging between 7%-10% increase depending on the trade.

### Subcontractor Interest

- Difficult to get interest/bids from Mechanical Subcontractors.
- Number of local flooring subcontractors is limited.
- Business of market limits General Contractor's ability to be competitive at the subcontractor level.
- Juneau subcontractor market is limited; hard to be competitive if solicit subcontractor bids outside of Juneau.

### Market/Competition

- Private sector is very busy.
- Market in general is flooded with work.
- Have experienced subcontractors not wanting to bid the full scope of work associated with their trade.
- Private sector more attractive to bid –
  - more flexibility with schedule in terms of long lead items and weather windows.
  - more flexibility with procurement methods (not limited to competitive bid, design-bid-build procurement).
  - less paperwork.

- more streamlined decision making.
- flexibility to select subcontractors based on qualifications and past working history v. low bid.
- Lump sum has gone away in the Private Sector

### Schedule

- Like to see roof bids advertise in the fall for upcoming season.
- Still seeing long lead times for major equipment.

### Procurement

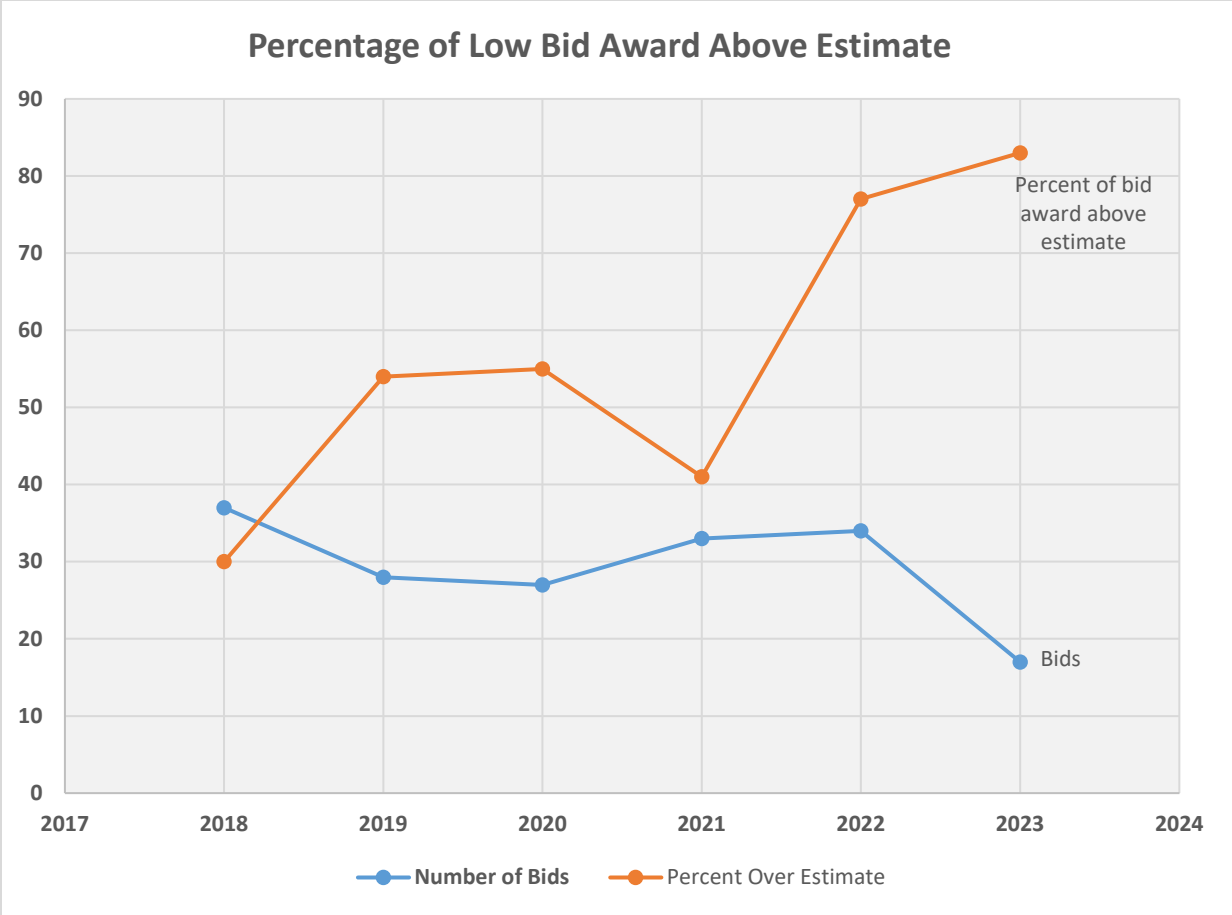
- Like the Term Contract option.
- Lump sum bidding still has a place, keeps pencils sharp.
- Lump sum bidding appropriate for the \$3M-\$5M range.
- Expand options to do Alternative Public Works.
- Alternative Public Works/collaborative delivery promote the ability to find solutions within budget.
- Luke warm about the idea of CBJ purchasing long lead items in advance to mitigate extended schedules; workable if equipment is not on the critical path. Could work if equipment already procured at time of bid.
- Consider a fair way to share risk. Owners who expect the Contractor to bear all risk are seeing higher costs.

### Recommendations/Follow-up:

- Issue an RFP for Estimators, requiring a focus on the Juneau market, hired directly by CBJ v. subconsultant to A/E team.
- Expand ability to use alternative public works procurement such as Construction Manager At Risk (CMAR)
- Consider implementing Value Engineering and Constructability Review. Value Engineering is budget driven. Constructability evaluates "buildability" of construction documents, which also drives the cost.
- Consider building flexibility in procurement code to allow advance purchase of long lead items by CBJ prior to bidding balance of work.
- Revisit the efficacy of the PLA. Is it accomplishing what the Assembly intended? We have evidence that it adds costs to projects.

### Changes that CBJ has made that have improved things:

- Contractors appreciate "Draft Bid" schedule that notifies them of upcoming projects not yet advertised.
- Appreciate shortening of days required to hold bids from 120 to 60 or 45. Helpful since suppliers don't want to hold pricing for extended periods.
- Appreciate building in extended schedules to allow for long lead times.



Procurement Year	Total projects sealed bid	
2018	Total projects sealed bid	37
2019	Total projects sealed bid	28
2020	Total projects sealed bid	27
2021	Total projects sealed bid	33
2022	Total projects sealed bid	34
2023	Total projects sealed bid	17 as of 4/25/23



Presented by: The City Manager  
Introduced: April 5, 2023  
Drafted by: Engineering & Public Works Department

RESOLUTION OF THE CITY AND BOROUGH OF JUNEAU, ALASKA

Serial No. 3016

**A Resolution Adopting the City and Borough Capital Improvement Program for Fiscal Years 2024 through 2029, and Establishing the Capital Improvement Project Priorities for Fiscal Year 2024.**

WHEREAS, the CBJ Capital Improvement Program is a plan for capital improvement projects proposed for the next six fiscal years; and

WHEREAS, the Assembly has reviewed the Capital Improvement Program for Fiscal Year 2024 through Fiscal Year 2029, and has determined the capital improvement project priorities for Fiscal Year 2024.

NOW, THEREFORE, BE IT RESOLVED BY THE ASSEMBLY OF THE CITY AND BOROUGH OF JUNEAU, ALASKA:

**Section 1. Capital Improvement Program.**

(a) Attachment A, entitled "City and Borough of Juneau Capital Improvement Program, Fiscal Years 2024-2029," dated **June 1, 2023**, is adopted as the Capital Improvement Program for the City and Borough.

(b) The following list, as set forth in the "City and Borough of Juneau Capital Improvement Program, Fiscal Years 2024-2029," are pending capital improvement projects to be undertaken in FY24:

<b>FISCAL YEAR 2024 GENERAL SALES TAX IMPROVEMENTS</b>		
<b>DEPARTMENT</b>	<b>PROJECT</b>	<b>FY24 BUDGET</b>
Eaglecrest	Deferred Maintenance /Mountain Operations Improvements	\$ 300,000
Eaglecrest	Eaglecrest Master Plan	50,000
Manager's Office	New City Hall	10,000,000
Manager's Office	JPD/CCFR Radio System Replacement	2,000,000
Manager's Office	Jordan Creek Greenbelt Improvements	150,000
Manager's Office	Fire - Add Staff Restroom at Sleep-off center - St. Vincent de Paul	150,000
Manager's Office	Zero Waste Program	100,000
Manager's Office	Zero Waste Subdivision	50,000
Parks & Recreation	Deferred Building Maintenance	1,000,000
Parks & Recreation	Park & Playground Deferred Maintenance and Repairs	300,000
Parks & Recreation	Sports Field Resurfacing & Repairs	50,000
Parks & Recreation	OHV Park and Trails	200,000
Parks & Recreation	Trail Improvements	150,000
<b>General Sales Tax Improvements Total</b>		<b>\$ 14,500,000</b>

**FISCAL YEAR 2024  
AREAWIDE STREET SALES TAX PRIORITIES**

<b>DEPARTMENT</b>	<b>PROJECT</b>	<b>FY24 BUDGET</b>
Street Maintenance	Vintage Boulevard and Clinton Drive Reconstruction Phase 1	\$ 2,100,000
Street Maintenance	Pavement Management	930,000
Street Maintenance	Sidewalk & Stairway Repairs	1,000,000
Street Maintenance	Areawide Drainage Improvements	250,000
Street Maintenance	Dudley - Loop to Tongass	1,300,000
Street Maintenance	Dogwood Lane - Columbia to Mend Blvd	1,800,000
Street Maintenance	4th and E streets Douglas water system replacement, resurface and drainage improvements	1,930,000
Street Maintenance	10th St, F St, W 8th St drainage and rehab planning and design	200,000
Street Maintenance	Gold Creek Flume Rehabilitation	600,000
Capital Transit	FTA Grant Match - Bus Shelter Replacement	220,000
Engineering	Safe Streets For All (SS4A) Grant Match	70,000
Engineering	EV Policy and Planning	50,000
Engineering	Contaminated Sites ADEC Follow up Reporting	50,000
<b>Areawide Street Sales Tax Priorities Total</b>		<b>\$ 10,500,000</b>

**FISCAL YEAR 2024  
TEMPORARY 1% SALES TAX PRIORITIES  
Voter Approved Sales Tax 10/01/18 - 09/30/23**

<b>DEPARTMENT</b>	<b>PROJECT</b>	<b>FY24 BUDGET</b>
Harbors	Aurora Harbor Rebuild Phase III	\$ 1,500,000
Wastewater Utility	Lift Station SCADA Integration	500,000
Parks & Recreation	Deferred Building Maintenance	200,000
School District	JSD Buildings Major Maintenance / Match	200,000
<b>Temporary 1% Sales Tax Priorities Total</b>		<b>\$ 2,400,000</b>

**FISCAL YEAR 2024  
TEMPORARY 1% SALES TAX PRIORITIES  
Voter Approved Sales Tax 10/01/23 - 09/30/28**

<b>DEPARTMENT</b>	<b>PROJECT</b>	<b>FY24 BUDGET</b>
Parks and Recreation	Deferred Building Maintenance	\$ 2,000,000
Managers	Childcare Funding	400,000 *
Parks and Recreation	Parks and Playgrounds Major Maintenance and Repairs	750,000
Managers	Fire - Ladder Truck Replacement	1,200,000 *
School District	JSD Buildings Major Maintenance / Match	750,000
Managers	Telephone Hill Redevelopment	500,000
Managers	JPD/CCFR Radio System Replacement	500,000
Managers - Library	Waterfront Museum	500,000
Harbors	Harbor Projects / Grant Match	2,400,000
<b>DRAFT - WILL BE UPDATED UPON APPROVAL BY ASSEMBLY</b>		
<b>Temporary 1% Sales Tax Priorities Total</b>		<b>\$ 9,000,000</b>

\* Operating Budget Funding

**FISCAL YEAR 2024  
PORT DEVELOPMENT FEE PRIORITIES**

<b>DEPARTMENT</b>	<b>PROJECT</b>	<b>FY24 BUDGET</b>
Parks and Recreation	Marine Park Construction	\$ 2,000,000
Parks and Recreation	Homestead Park Construction	1,000,000
Managers	Circulator Study	20,000
Capital Transit	Downtown Transportation Center Signage	<del>50,000</del> \$75,000
Wastewater	Outer Drive Sewer Pump Station Improvements	<del>900,000</del> \$950,000
<b>DRAFT - WILL BE FINALIZED UPON COMPLETION OF PUBLIC PROCESS</b>		
<b>Port Development Fee Priorities Total</b>		<b>\$ 3,970,000 \$4,045,000</b>

**FISCAL YEAR 2024  
STATE MARINE PASSENGER FEE PRIORITIES**

<b>DEPARTMENT</b>	<b>PROJECT</b>	<b>FY24 BUDGET</b>
Managers	Capital Civic Center	\$ 1,000,000
Managers	Seawalk	10,000,000
<b>DRAFT - WILL BE FINALIZED UPON COMPLETION OF PUBLIC PROCESS</b>		
<b>State Marine Passenger Fee Priorities Total</b>		<b>\$ 11,000,000</b>

**FISCAL YEAR 2024  
BARTLETT HOSPITAL ENTERPRISE FUND**

<b>DEPARTMENT</b>	<b>PROJECT</b>	<b>FY24 BUDGET</b>
Bartlett Hospital	Deferred Maintenance	\$ 2,000,000
<b>Bartlett Hospital Enterprise Fund Total</b>		<b>\$ 2,000,000</b>

**FISCAL YEAR 2024  
FACILITIES MAINTENANCE FUND**

<b>DEPARTMENT</b>	<b>PROJECT</b>	<b>FY24 BUDGET</b>
Parks and Recreation	Deferred Building Maintenance	\$ 100,000
<b>Facilities Maintenance Fund Total</b>		<b>\$ 100,000</b>

**FISCAL YEAR 2024  
LANDS & RESOURCES FUND**

<b>DEPARTMENT</b>	<b>PROJECT</b>	<b>FY24 BUDGET</b>
Lands & Resources	Pits and Quarries Management, Infrastructure Maintenance and Expansion	\$ 700,000
Lands & Resources	Zero Waste Subdivision Plan	50,000
Lands & Resources	Auke Bay Property Development and Disposal	450,000
<b>Lands &amp; Resources Fund Total</b>		<b>\$ 1,200,000</b>

**FISCAL YEAR 2024  
WASTEWATER ENTERPRISE FUND**

<b>DEPARTMENT</b>	<b>PROJECT</b>	<b>FY24 BUDGET</b>
Wastewater Utility	Facilities Planning, Infiltration and Inflow, ABTP long term study, solids digester)	\$ 220,000
Wastewater Utility	Areawide Collection System Improvements	55,000
Wastewater Utility	JDTP SCADA and Instrumentation Upgrades	150,000
Wastewater Utility	Dudley - Loop Road to Tongass	143,000
Wastewater Utility	Conifer Lane - Back Loop to end	354,000
Wastewater Utility	Dogwood Lane - Columbia to Mendenhall Blvd	250,000
Wastewater Utility	4th and E streets Douglas, water system replacement, resurface and drainage improvements	40,000
Wastewater Utility	Stairway Sewer Improvements	100,000
Wastewater Utility	Pavement Management Program-Utility Adjustments (frames & lids)	20,000
<b>Wastewater Enterprise Fund Total</b>		<b>\$ 1,332,000</b>

**FISCAL YEAR 2024  
WATER ENTERPRISE FUND**

<b>DEPARTMENT</b>	<b>PROJECT</b>	<b>FY24 BUDGET</b>
Water Utility	Lena Loop Water System Replacement	\$ 150,000
Water Utility	Egan Drive Crossing Water Main Replacements (Channel Dr.,Norway Pt., Highland Dr. Salmon Ck, Sunny Pt.)	250,000
Water Utility	Salmon Creek Onsite Chlorine Generation Replacement / Upgrade	10,000
Water Utility	Aurora Vault Removal	550,000
Water Utility	Cedar Park (W Juneau) Pump Station Upgrades / Rehab	825,000
Water Utility	PRV Station Improvements & Upgrades (Crow Hill, 5th St. Douglas)	50,000
Water Utility	ADOT Projects Utility Adjustments (provide valve boxes, vault lids etc.)	55,000
Water Utility	Conifer Lane - Back Loop to end	459,000
Water Utility	Dudley - Loop Road to Tongass	286,000
Water Utility	Stairway Water Improvements	100,000
Water Utility	4th and E Street Water System Replacement	405,000
Water Utility	Dogwood Lane - Columbia to Mendenhall Blvd	340,000
Water Utility	Pavement Management Water Utility Adjustments	20,000
	<b>Water Enterprise Fund Total</b>	<b>\$ 3,500,000</b>

**ORDINANCE 2023-14 CAPITAL PROJECTS FUNDING TOTAL** \$ ~~57,902,000~~ \$57,977,000

**ORDINANCE 2023-14 OPERATING BUDGET FUNDING TOTAL** \$ 1,600,000

(c) The following list, as set forth in the "City and Borough of Juneau Capital Improvement Program, Fiscal Years 2024-2029," are capital improvement projects identified as priorities proposed to be undertaken beginning in FY24, but are dependent on other unsecured funding sources. As the sources are secured, the funds will be appropriated:

**FISCAL YEAR 2024  
AIRPORT UNSCHEDULED FUNDING**

<b>DEPARTMENT</b>	<b>PROJECT</b>	<b>FY24 BUDGET</b>
Airport	Construct 121/135 Ramp Rehab, drainage, fencing, lighting & RON aircraft parking	\$ 12,200,000
Airport	Construct/Replace Jetbridge (PBB) Gate 5	2,000,000
Airport	Design East GA, TXL and Apron	275,000
Airport	Design West GA, TXL	300,000
Airport	Design Safety Area Grading/RW Shoulders/NAVAIDS	400,000
Airport	Land Acquisition - Channel Flying/Loken	1,500,000
	<b>Airport Unscheduled Funding Total</b>	<b>\$ 16,675,000</b>

**FISCAL YEAR 2024  
UNSCHEDULED FUNDING**

<b>DEPARTMENT</b>	<b>PROJECT</b>	<b>FY24 BUDGET</b>
Bartlett Hospital	Wildflower Court Maintenance and Repairs	500,000
Capital Transit	FTA Grant - Bus Shelter Replacements	\$ 860,000
Harbors	Cost Share w/ ACOE - Statter Breakwater Feasibility Study	500,000
Manager's Office	JPD DEU Building Expansion	1,610,000
Manager's Office	JPD and CCFR - Radio System replacement	14,500,000
Parks and Recreation	Hank Harmon Public Range Hunter Safety Access Grant	850,000
Parks and Recreation	35 Mile ORV Park and Trails Recreation Trails Program Grant	300,000
Parks and Recreation	Montana Creek Bridge Replacement TAP Grant	1,500,000
Public Works	Upper Jordan Creek Sediment Control	5,000,000
	<b>Unscheduled Funding Total</b>	<b>\$ 25,620,000</b>

**Section 2. Fiscal Year 2024 Budget.** It is the intent of the Assembly that the capital improvement project budget allocations as set forth in the FY24 pending Capital Improvements List in Section 1(b), above, not already appropriated, shall become a part of the City and Borough's Fiscal Year 2024 Budget.

**Section 3. State and Federal Funding.** To the extent that a proposed CIP project, as set forth in Section 1(c), above, includes state funding, federal funding, or both, the amount of funding for that project is an estimate only, and is subject to appropriation contingent upon final funding being secured. It is the intent of the Assembly that once funding is secured, these items will be brought back to the Assembly for appropriation.

**Section 4. Effective Date.** This resolution shall be effective immediately upon adoption.

Adopted this \_\_\_\_\_ day of **June**, 2023.

\_\_\_\_\_  
Beth A. Weldon, Mayor

Attest:

\_\_\_\_\_  
Elizabeth J. McEwen, Municipal Clerk

# VOTER APPROVED 1% Sales Tax Projects FY24 - 29

Proposition 3 from October 2022 Ballot

in \$Million

Project/Expenditure Name:	Funds Assigned	rem FY24 (9 months)	FY25	FY 26	FY 27	FY28	rem FY29 (3 months)	TOTAL
CBJ Building Maintenance Projects	11.5	2	2.5	2.35	2	1.65	1	11.5
Affordable Housing Fund	4.15		0.5	1	0.75	1.15	0.75	4.15
Childcare Funding	2.5	0.4	0.5	0.5	0.5	0.6		2.5
Parks & Recreation Major Maintenance & Repairs	5	0.75	1	1	1	1	0.25	5
CCFR Ladder Truck Replacement	1.2	1.2						1.2
North SOB Parking	5			1.15	2.5	0.4	0.95	5
School District Facility Funding	5	0.75	1	1	1	1	0.25	5
Telephone Hill Redevelopment	2	0.5	1	0.5				2
JPD Radio System Replacement	2	0.5		1.5				2
Lemon Creek Multi-Modal Path	1.5				1.5			1.5
Information Technology	3			0.75	0.75	1.5		3
Waterfront Museum	2	0.5		0.4	1	0.1		2
Street Maintenance Shop Bays	2		2					2
Pederson Hill Development	1.85			1.85				1.85
Harbor Projects/Grant Match	6.5	2.4	3.5			0.6		6.5
Gastineau Avenue Widening & Turn Around	4				1	3		4
Restricted Budget Reserve	1					1		1
<b>Total Requests:</b>	<b>60.2</b>	9	12	12	12	12	3.2	60.2

**FY22-FY24 Budget Summary and Impact on Fund Balances**  
4/28/2023

Section D, Item 10.

	Revenues	Expenditures	Surplus (Deficit)	Fund Balance
<b>62 FY2022</b>				
102 <b>Manager Proposed Budget</b>	\$ 158,632,100	\$ (166,440,700)	\$ (7,808,600)	\$ 20,771,800
103				
123 <b>Assembly Adopted Budget</b>	\$ 162,239,300	\$ (167,608,800)	\$ (5,369,500)	\$ 23,210,900
124				
166 <b>Final Year-End</b>	\$ 182,016,259	\$ (200,553,759)	\$ (18,537,500)	\$ 10,042,900
167				
<b>168 FY2023</b>				
193 <b>Manager Proposed Budget</b>	\$ 166,599,600	\$ (170,042,200)	\$ (3,442,600)	\$ 6,600,300
194				
195 Fire - Expanded MIH Program (partially grant funded)	\$ 43,500	\$ (540,700)		
196 Increase Sales Tax Support to CIPs (Amendments)		\$ (375,000)		
197 Increase to JCF Social Service Block Grant		\$ (264,600)		
198 School District Outside the Cap		\$ (157,700)		
199 Alaska Heat Smart Operations Grant		\$ (142,000)		
200 AEYC - Parents as Teachers (conditioned)		\$ (141,000)		
201 Clerk's Office Increments (1.5 FTE) - Technical Adj.		\$ (116,700)		
202 Shéiyi Xaat Hit Youth Development Leader FTEs		\$ (102,200)		
203 AEYC - Operations		\$ (102,000)		
204 Increased GF Support to Eaglecrest		\$ (55,000)		
205 Warming Shelter Contract Increase		\$ (30,000)		
206 Juneau Festival Committee Increase		\$ (6,200)		
207 Juneau Human Right Commission - Community Engagement		\$ (5,000)		
208 <b>Total Assembly Adopted Changes</b>	\$ 43,500	\$ (2,038,100)	\$ (1,994,600)	
209				
210 Reduction of Mill Rate to 10.56 Mills	\$ (575,800)			
211 <b>Revenue Forecast Changes</b>	\$ (575,800)	\$ -	\$ (575,800)	
212				
213 <b>Assembly Adopted Budget</b>	\$ 166,067,300	\$ (172,080,300)	\$ (6,013,000)	\$ 4,029,900
214				
215 Wage and Health Benefit Costs		\$ (3,093,600)		
216 JSD Additional FY23 Funding Request		\$ (2,320,737)		
217 Capital Civic Center		\$ (2,500,000)		
218 River Road Junk Vehicle Cleanup		\$ (250,000)		
219 Telephone Hill Redevelopment		\$ (100,000)		
220 Removing Sales Tax on Food Juneau Voter Survey		\$ (40,000)		
221 Medical Respite (offset by portion covered by HEC Grant)		\$ (15,319)		
222 <b>Supplemental Appropriations</b>	\$ -	\$ (8,319,656)		
223				
224 State Reimbursement of Previously Unreimbursed School Bond Debt	\$ 16,035,000			
225 ARPA Funds Received in FY23	\$ 3,869,519			
226 Sales Tax Revenue Above/(Below) Forecast	\$ 6,900,000			
227 FY20 and FY21 SEMT Payments (amount over budget)	\$ 1,345,127			
228 Local Assistance and Tribal Consistency Fund (LATCF) FY23 Allocation	\$ 1,321,493			
229 Transit CRRSAA Grant Award	\$ 1,026,200			
230 Community Assistance Program Award Above Estimates	\$ 770,821			
231 Federal PILT Revenue Above Estimates	\$ 150,400			
232 Property Tax Certified Roll True-Up	\$ (88,178)			
233 Anticipated Lapse		\$ 1,000,000		
234 <b>Anticipated Variances</b>	\$ 31,330,382	\$ 1,000,000		
235				
236 <b>Final Year-End (projected)</b>	\$ 197,397,682	\$ (179,399,956)	\$ 17,997,727	\$ 28,040,627

FY22-FY24 Budget Summary and Impact on Fund Balances  
4/28/2023

Section D, Item 10.

238 **FY2024**

	<u>Revenues</u>	<u>Expenditures</u>	<u>Surplus (Deficit)</u>	<u>Fund Balance</u>
239				
240	Prior Year Adopted Budget	\$ 166,067,300	\$ (172,080,300)	
241	FY23 (post adoption) Wage and Health Benefit Costs		\$ (3,093,600)	
242	FY24 Wage and Health Benefit Costs		\$ (1,560,346)	
243	Merit Increases and Other Personnel Actions (and associated benefits)		\$ (1,006,254)	
244	Increase to 1% Voter-Approved Projects		\$ (900,000)	
245	Increase to General Sales Tax Projects		\$ (425,000)	
246	FY23 One-Time Expenditures/Revenue		\$ 390,000	
247	Sales Tax Growth over FY23 Adopted Budget	\$ 9,700,000		
248	Property Tax Growth over FY23 Adopted Budget	\$ 5,028,255	@ 10.28 mills	
249	Investment Income over FY23 Adopted Budget	\$ 1,607,400		
250	Tobacco Tax - MIH	\$ 663,700		
251	Departmental Revenue Growth	\$ 532,200		
252	Liquor Tax Growth over FY23 Adopted Budget	\$ 230,000		
253	Marijuana Tax Growth over FY23 Adopted Budget	\$ 80,000		
254	Adjusted Base	\$ 183,908,855	\$ (178,675,500)	\$ 5,233,355
255	JSD Additional Up-to-the-Cap Instructional Funding		\$ (2,284,600)	
256	Professional Services Inflation		\$ (562,000)	
257	Fleet Replacement		\$ (527,900)	
258	IT: O365, MFA, Cyber Security, Adobe Licensing		\$ (513,500)	
259	Dependent Care Assistance		\$ (379,800)	
260	General Supplies Inflation (Fuel, Chemicals, etc.)		\$ (324,000)	
261	457 Deferred Compensation Employer Match		\$ (315,900)	
262	Public Defenders Increase		\$ (230,000)	
263	Utilities (Electricity, Heating Oil)		\$ (203,100)	
264	Travel and Training		\$ (188,900)	
265	Facilities Maintenance		\$ (154,800)	
266	IT Business Analyst (1.0 FTE)		\$ (133,500)	
267	Commercial Appraiser (1.0 FTE)		\$ (119,000)	
268	Insurance		\$ (108,200)	
269	Warming Shelter Increase		\$ (100,000)	
270	Other Commodities and Services Inflation		\$ (114,693)	
271	Lease, Parking Increases		\$ (86,400)	
272	ZGYC Recreation Coordinator (1.0 FTE) (offset by registration fee revenue)	\$ 8,000	\$ (75,200)	
273	Assembly Grant: AEYC Operations		\$ (75,000)	
274	HR Consultant (0.5 FTE)		\$ (69,500)	
275	HR Technician (0.5 FTE)		\$ (64,000)	
276	Aquatic Instructor (0.6 FTE)		\$ (24,000)	
277	Treadwell Recreation Coordinator (0.16 FTE)		\$ (15,000)	
278	Full Cost/Engineering Indirect Allocation Increase		\$ 418,200	
279	Adjusted Base + Recurring Revenues/Expenditures Changes	\$ 183,916,855	\$ (184,926,293)	\$ (1,009,438)
280				
281	<u>Non-Recurring Revenues/Expenditures</u>			
282	LATCF FY24 Allocation	\$ 1,321,493		
283	SEMT (prior-year catchup)	\$ 400,000		
284	New City Hall		\$ (10,000,000)	
285	Contribution to Restricted Budget Reserve		\$ (4,000,000)	
286	JPD Radio System Upgrade		\$ (2,000,000)	
287	New City Hall Advocacy		\$ (50,000)	
288	<b>Manager Proposed Budget</b>	<b>\$ 185,638,348</b>	<b>\$ (200,976,293)</b>	<b>\$ (15,337,945)</b>
289				
290				
291	Reduction in HBT Allocation to Travel Juneau	(320,000)	\$ 320,000	
292	Assembly Adopted Recurring Revenues/Expenditures Changes	\$ (320,000)	\$ 320,000	\$ -
293				
294	<u>Non-Recurring Revenues/Expenditures</u>			
295	GF Support to Hospital		\$ (2,500,000)	
297	Increased GF Support to Eaglecrest		\$ (125,500)	
298	Total Assembly Adopted Changes	\$ (320,000)	\$ (2,305,500)	\$ (2,625,500)
299				
300				
301	Revenue Forecast Changes	\$ -	\$ -	\$ -
302				
303	<b>Assembly Adopted Budget</b>	<b>\$ 185,318,348</b>	<b>\$ (203,281,793)</b>	<b>\$ (17,963,445)</b>



**AFC's Decision List - FY24 Proposed Budget Process**  
**As of May 3, 2023**  
 Note: Material Page Number References are from Online Meeting Packets

#	Expenditure Description	Proposed in Manager's Budget	Request	GF Request Over FY23	GF Request Over Manager's	Approved Amount	Mill Rate Equivalent	Status	Decision Date	One-Time or Ongoing	Materials					Budget Book
											Meeting Date & Packet Page	Meeting Date & Packet Page	Meeting Date & Packet Page	Meeting Date & Packet Page	Meeting Date & Packet Page	
1	Hospital GF Support for Operations	-	518,000	518,000	518,000		0.08	Pending		Ongoing	<a href="#">4/19/2023 AFC Packet Pages 19-29</a>					<a href="#">Page 171</a>
2	Hospital GF Support for Operations	-	1,982,000	1,982,000	1,982,000		0.30	Pending		One-Time	<a href="#">4/19/2023 AFC Packet Pages 19-29</a>					<a href="#">Page 171</a>
3	Southeast Alaska Independent Living - Dimond Park Field House Elevator	-	1,020,000	1,020,000	1,020,000		0.16	Pending		One-Time	<a href="#">4/19/2023 AFC Packet Pages 30-48</a>	<a href="#">5/3/2023 AFC Packet Pages 15-24</a>				NA
4	The Alaska Committee - Equipment Replacement	100,000	436,000	336,000	336,000		0.05	Pending		One-Time	<a href="#">4/19/2023 AFC Packet Pages 30-48</a>	<a href="#">5/3/2023 AFC Packet Pages 59-60</a>				<a href="#">Page 84</a>
5	Alaska Heat Smart - Operations	-	235,094	92,894	92,894		0.01	Pending		One-Time	<a href="#">4/19/2023 AFC Packet Pages 30-48</a>	<a href="#">5/3/2023 AFC Packet Pages 91-101</a>				<a href="#">Page 84</a>
6	Juneau Economic Development Council - \$40,000 Operations (10% increase); \$30,000 USFS Matching Grant Support	400,000	470,000	70,000	70,000		0.01	Pending		One-Time	<a href="#">4/19/2023 AFC Packet Pages 30-48</a>	<a href="#">5/3/2023 AFC Packet Pages 61-90</a>				<a href="#">Page 84</a>
7	Juneau Commission on Aging - Operations	-	15,000	5,000	5,000		0.00	Pending		Ongoing	<a href="#">4/19/2023 AFC Packet Pages 30-48</a>	<a href="#">5/3/2023 AFC Packet Pages 25-28</a>				<a href="#">Page 84</a>
8	Juneau Nordic Ski Club - Snow Grooming Equipment	-	25,000	25,000	25,000		0.00	Pending		One-Time	<a href="#">5/3/2023 AFC Packet Pages 102-105</a>					NA
9	Juneau Housing First Collaborative - Phase III		1,400,000	1,400,000	1,400,000		0.22	Pending		One-Time	<a href="#">5/3/2023 AFC Packet Pages 29-58</a>					NA
10	Eaglecrest FY24 Increment Request	930,000	1,088,800	158,800	158,800	125,500	0.02	Approved	4/12/2023	One-Time	<a href="#">4/12/2023 AFC Packet Pages 46-64</a>	<a href="#">4/19/2023 AFC Packet Page 51</a>				<a href="#">Page 98</a>
11	Hospital GF Support for Operations	-	2,500,000	2,500,000	2,500,000	2,500,000	0.38	Approved	4/19/2023	One-Time	<a href="#">4/19/2023 AFC Packet Pages 19-29</a>					<a href="#">Page 171</a>

**Total Requests      8,107,694      2,625,500      1.24**

**Assembly Approved FY2024 Actions**

HBT	-	n/a
AHF	-	n/a
GF - One-Time	2,625,500	n/a
GF - Ongoing	-	-
<b>Total</b>	<b>2,625,500</b>	<b>-</b>

**City and Borough of Juneau  
Assembly Finance Committee (AFC)**

**FY24 Revised Budget Calendar and Key Dates – as of May 3, 2023**

**April 5th – 5:30 pm – Special Assembly (Intro)**

- A. CBJ Budget Ordinance 2023-14
- B. School District Budget Ordinance 2023-15
- C. Mill Levy Ordinance 2023-16
- D. CIP Resolution 3016

**April 5th – 5:30 pm – AFC Meeting #1**

- A. Summary of FY2024 Revised Budget
- B. Overview of Major Revenues
- C. Assessors Valuation Report
- D. Overview of Debt Service
- E. Proposed Mill Rate
- F. Cost Allocation Overview

**April 12th – 5:30 pm – AFC Meeting #2**

- A. Juneau School District
- B. Eaglecrest
- C. Capital Improvement Plan – For Review
  - a. 1% Sales Tax Allocation – For Review

**April 19th – 5:30 pm – AFC Meeting #3**

- A. Juneau International Airport
- B. Bartlett Regional Hospital

**April 26th – 5:30 pm – Special Assembly (Hearing)**

- A. CBJ Budget Ordinance 2023-14
- B. School District Budget Ordinance 2023-15
- C. CIP Resolution 3016
- D. Mill Levy Ordinance 2023-16
- E. Motion to Establish Local Funding for School District Operations

**April 26th – 5:30 pm – AFC Meeting #4**

- A. Docks & Harbors
- B. Passenger Fee Plan – For Review
- C. Hotel-Bed Tax Funding
  - a. Allocation to Affordable Housing Fund
- D. Travel Juneau

**May 3rd – 5:30 pm – AFC Meeting #5**

- A. Update on FY24 Revenue Forecast
- B. School District Budget – For Action
- C. Assembly Grants & Community Requests
- D. Manager’s Proposed Increments & Budget Amendments
- E. Parental Leave
- F. Fare Free Transit
- G. Capital Improvement Plan Amendments
  - a. 1% Sales Tax Allocation Amendments

**May 8th – 7:00 pm – Regular Assembly**

- A. Adoption of the School District’s Budget Ordinance 2023-15

**May 10th – 5:30 pm – AFC Meeting #6**

- A. Decision List
- B. Capital Improvement Plan – For Action
  - a. 1% Sales Tax Allocation – For Action
- C. Passenger Fee Plan – For Action

**May 17th – 5:30 pm – AFC Meeting #7**

- A. Decision List – For Final Action
- B. Set Mill Rates – For Final Action
- C. Final FY24 Revised Budget Decisions
  - a. CIP Resolution 3016
  - b. Mill Levy Ordinance 2023-16
  - c. CBJ Budget Ordinance 2023-14

**June 7th – 6:00 pm – Regular Business AFC**

- A. TBD

**June 12th – 7:00 pm – Regular Assembly (Adoption)**

- A. CBJ Budget Ordinance 2023-14
- B. Mill Levy Ordinance 2023-16
- C. CIP Resolution 3016

*Public hearings on the budget must be completed by May 1, per Charter Section 9.6*

*Assembly must determine school district instructional funding and notify district within 30 days of receipt of district budget (Charter Section 13.6(b))*

*Assembly must appropriate school district funding by May 31 (Chart Section 13.6(b))*

*Assembly must adopt Operating Budget, Mill Levy, and Capital Improvement Plan by June 15th or the manager’s proposal is deemed adopted (Charter Section 9.7 & 9.8)*



# MEMORANDUM

Date: May 1, 2023

To: Assembly Finance Committee

Thru: Duncan Rorie Watt  
City Manager

From: Dallas Hargrave   
Human Resources & Risk Management Director

Re: Paid Parental Leave Proposal

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Over the last year, the City and Borough of Juneau (CBJ) has experienced unprecedented recruitment and retention issues. We are not alone. Employers across the city, state and nation are facing similar challenges with a “tight” labor market that generally has more open jobs than applicants willing to take the jobs. Recently, the CBJ has implemented a sign-on bonus program, a new online recruitment system, and we are in the process of implementing an employer contribution to a dependent care flexible spending account and an employer matching contribution to the 457 deferred compensation plan. However, with recent implementation of paid parental leave programs in other Alaska municipalities, some Assembly members have requested that we also put forward a proposal for paid parental leave at the CBJ.

## Paid Parental Leave

Under the Family Medical Leave Act (FMLA) and the Alaska Family Leave Act (AFLA), employees are entitled to take up to twelve weeks (FMLA) or eighteen weeks (AFLA) of leave for the birth, adoption or foster placement of a child, or to care for themselves or a family member with a serious health condition. During that period, employees’ jobs are protected, they receive health insurance benefits, and they may receive wages if they use existing personal leave accruals. There is no requirement that employers provide paid leave. Around 30 years ago, CBJ ceased providing employees with a separate medical leave benefit, folding that program into personal leave.

As the only industrialized nation without a national paid parental leave program, childbirth and adoption can have a significant financial impact on working parents. Although paid parental leave is highly desired by workers, it is not extremely common. The most recent employee benefits survey from the Society for Human Resource Management (SHRM), for example, found that 33 percent of employers offered their employees some paid parental leave in 2022. That number is down from the 39 percent that offered the time in 2020. Paid leave for adoption or foster care is even less common: 28 percent of employers offered adoption leave in 2022, while just 22 percent offered leave for foster care.<sup>1</sup>

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<sup>1</sup> <https://www.shrm.org/hr-today/trends-and-forecasting/research-and-surveys/Pages/Leave.aspx>

In March 2023, the Municipality of Anchorage and the City of Soldotna implemented paid parental leave policies, granting a benefit of four and six paid weeks (respectively) of parental leave. It is important to note that no two leave programs are alike, and thus just considering what other employers provide regarding paid parental leave is not necessarily always “comparing apples to apples.” A review of parental leave benefits provided by municipal employers across the United States indicates that there is not a standard approach from which to compare this benefit.<sup>2</sup>

### **Benefits of a Paid Parental Leave Benefit**

Implementing a Paid Parental Leave program can lead to many potential benefits for employees, employers, and society in general. These benefits include the following:

**Recruitment and Retention of Employees:** Paid Parental Leave promotes a family-friendly environment that encourages healthy parent-child relationships, because it permits parents to bond with their children during the crucial first stages of a child’s life. Offering paid parental leave will help attract and retain workers, especially workers in newer generations who are moving into prime child-bearing years and are looking for better integration between their work and family lives.

**Equity and Social Justice:** Paid parental leave can reduce disparities in leave-taking between low and high socioeconomic groups. With paid leave, more people take time off, particularly those that are low income and either wouldn’t have taken leave or would have dropped out of the workforce. Additionally, the absence of paid parental leave presents a disadvantage for working women. Without paid leave, women are more likely to exit the workforce. If and when they re-enter, they may return to lower-paying jobs or no jobs at all. Research indicates that when mothers have access to paid maternity leave, their wages increase as much as 9%.<sup>3</sup> Many believe that lower participation of women in the workforce is a result of the lack of paid leave. Economists estimate that women’s labor force participation is lower for 25-54 year-olds due to the lack of universal paid leave. A comparative study of twenty-two countries found that the U.S. fell from the sixth-highest in labor force participation for women in 1990 to seventeenth by 2010.<sup>4</sup> By providing the opportunity for both parents to take parental leave regardless of gender, it allows both parents the chance to be caregivers, and women are less likely to have their career stalled for doing so.

**Furtheres the CBJ as a leading municipal employer in Alaska:** Implementing a paid parental leave benefit would set a positive example for other government agencies, as well as companies doing business in Juneau and Alaska, and set CBJ apart from most other municipal employers in Alaska.

### **Implementation of a Paid Parental Leave Benefit at CBJ**

Paid time off for parental leave should create a separate leave bank for FMLA-qualifying birth, adoption, or placement of a child. The leave bank would not have a cash value, but would provide up to six weeks of paid time off to supplement an employee’s regular personal leave they have accrued. We recommend that the CBJ paid parental leave policy contain the following components:

<sup>2</sup> <https://nationalpartnership.org/resource/paid-family-leave-policies-for-municipal-employees/>

<sup>3</sup> *LA Times* <http://www.latimes.com/opinion/editorials/la-ed-navy-maternity-leave-20150729-story.html>

<sup>4</sup> *The New Republic*, July 23, 2015, <http://www.newrepublic.com/article/122348/how-do-you-make-sure-generous-paid-leave-doesnt-backfire-women>

1. Establish a leave amount of six weeks for a qualifying parental leave event;
2. Allow the value of the leave to be the employee's regular rate of pay;
3. Specify that the ability to qualify for paid parental leave shall coincide with FMLA/AFLA qualification; and
4. Specify that the leave has no cash value and that the benefit runs concurrently with FMLA and AFLA entitlements.

Although it is anticipated that the paid parental leave policy shall be implemented through a change to the CBJ Personnel Rules and a Manager's policy that would apply to all qualifying employees, CBJ management will share drafts and seek input from union bargaining unit representatives.

It is difficult to estimate the total costs of implementing a paid parental leave benefit because there will likely be costs associated with the leave or back-filling for some work while an employee is on leave. However, there will likely also be cost savings associated with reduced turnover of employees who are more likely to stay in a position because of the ability to take this new leave.

Est. # of eligible employees	Ave. cost of 6 weeks of leave (including 30% benefit estimate)	Estimated annual cost of leave	Estimated cost of backfilling position while on leave	Total estimated annual cost to implement paid parental leave program
18	\$13,000	\$234,000	\$175,500	\$409,500

This cost estimate is based on the following assumptions:

- An average annual number of babies born of 12 per year, approximately 25% of which have typically been born to parents who are both a CBJ employee. Adoption and foster care is difficult to estimate, so this estimate includes 3 eligible employees per year.
- The average cost of 6 weeks of leave considered both the average wage for a CBJ employee and the average workweek, considering that different employees work different workweeks, depending on the job.
- The estimated cost of backfilling the position assumed an overtime rate of pay for all the hours of leave taken for 50% of the eligible employees. It was assumed that the other 50% of eligible employees would have their work covered by coworkers or delayed with no additional overtime costs for backfill.

It is anticipated that if the paid parental leave program is implemented, the costs will likely go up over time as the demographics of our workforce shift as more employees who are eligible for this leave are likely to choose to become and remain a CBJ employee because of this benefit. Approximately 75%, or \$307,125, of the total cost estimated would be covered by general funds, with the remainder funded by internal service and enterprise departments.

### Recommended Action

If the Assembly wants to pursue implementation of a parental leave benefit, CBJ leadership requests that the Assembly Finance Committee direct staff to develop proposed changes to the CBJ Personnel Rules to implement a paid parental leave benefit as presented. With the changes to the CBJ Personnel Rules, CBJ leadership will either present a plan to implement the paid parental leave benefit in FY24 under the yet to be approved FY24 budget or seek future supplemental spending authority.