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## City Administrator Report to Mayor & City Council

September 20, 2013, Edition No. 101

### REPORT:

1. Annual Goal Setting Session: Please be thinking about our annual goal setting session for this year. Let's plan on **October 24th** as it is the fourth Thursday of the month and I have not received any comments that it will not work. Please let me know if this date does not work for you. I previously attached information from the University of Iowa's Institute of Public Affairs (IPA) should Council wish to bring in an outside consultant. The cost for IPA's services would be \$2700. The City of Bettendorf uses a different outside consultant and has used the same one for a number of years. As you may recall, those costs were 3-4 times what the Institute charges. I'll bring this forward at budget time.
  - Goals - attached is a copy of the current year's values/vision/mission and goals for your review. A status update will be provided in advance of the meeting.
  - Accomplishments: Staff is also in the process of compiling our annual memo on accomplishments as well as grants/outside funding. This will be provided in October.
2. CIP: Staff is targeting the December In-Depth to bring forward the draft CIP for Council review, prioritization, and in preparation for the budget process. You will see a new/updated format this year.
3. Pensions: Interesting article on hybrid pension systems is provided by Nancy and attached. The MFPRSI is hopefully targeted for legislative review this year as it is a "pension year".
4. Washington Street/Hwy 22: The contractor for IDOT indicated that it would be mid-October at the earliest before they begin the overlay work on Washington Street.
5. 8th and Cedar: At this point, until a long-term plan is determined. We will move forward with final grading, seeding and the placement of 2-3 trees as indicated previously.
6. City Code: A (hopefully) final review is in process between Finance Director Lueck, Community Development Director Boka, and myself. We should have a tentative schedule for review with the Council in the next couple weeks.
7. Bi-State: Attached is the September 2013 Commission Packet for your review.
8. Evaluation: Just a reminder that the City Administrator evaluation will need to be scheduled in November. I will return to you with suggested dates.
9. Conferences: Just a quick reminder regarding two upcoming conferences in September: I will be attending ICMA's annual conference from 9/21 through 9/25. The Iowa League's Annual meeting and conference will be held in Dubuque 9/25 through 9/27. I will, of course, be available by cell or email.
10. Council Meetings: Here is a tentative schedule for upcoming regular, in-depth and special meetings:
  1. October: LEAN update, Refuse Pilot Program, Annual Goal Session
  2. November: Round-a-Bout presentation, Complete Streets Policy, City

**"I remember Muscatine for its sunsets. I have never seen any on either side of the ocean that equaled them" — Mark Twain**

Administrator Evaluation

3. December: Capital Improvement Plan (CIP), City Code Review,

**City of Muscatine**  
**2013 Council and Management Agenda**  
**Adopted December 20, 2012**

**Long-Term Goals**

- Promote in-fill and voluntary annexation opportunities.
- Develop effective economic development strategies to encourage local investment and partnership.
- Partner with local organizations and governments to combine services or cooperate where feasible and appropriate.

**Council Policy Agenda 2012-2013**

**Top Priority**

- Develop a marketing and branding initiative for the City of Muscatine in cooperation with the Chamber and CVB. 2013
- Work to promote the City of Muscatine as a Blue Zones Community.
- Meet with MPW to redefine annexation policy for the extension of utilities in unincorporated areas
- Monitor the long-term plan to eliminate the accumulated deficit in the landfill fund.
- Update the City's Financial Policies to reflect a new target General Fund fund balance in excess of the present 10% threshold. This policy update will also address conditions for use of reserves, authority over reserves, and replenishment of reserves. 2013
- Position the City to address potential shortfalls in revenue due to state and federal mandates.
- Develop a citywide comprehensive plan incorporating Iowa's Smart Planning Principles. 2013
- Develop policies/incentives to encourage in-fill opportunities and address blight within the city limits.
  - Adopt housing tax abatement plan.
  - Adopt historical housing tax abatement plan.

**High Priority**

- Provide for the City's existing levels of service with an emphasis on essential services.
- Prioritize and determine funding sources for capital projects identified in the 5-Year Capital Improvement Plan.
- Promote a climate for businesses to thrive in Muscatine and Work to retain Tax Increment Financing (TIF) as a municipal economic development tool.
- Adopt updated City Code. 2013 (Estimated Cost \$10,000)
- Adopt updated Citywide zoning ordinance. 2013-2014 (Estimated cost \$15,000)

## **Management Agenda 2012-14**

The Management Agenda represents short-term projects for the City Administrator and staff. Included in the Management Agenda are items that are considered major projects that involve significant city resources and may span more than one year for completion

### **Top Priority**

- Focus on continuous improvement and excellence in service throughout the organization.
- Enhance the City's new website and maximize web-based resources as a resource for public communication.
- Complete an update of the City Code and City's 1974 zoning ordinance. 2013
- Prepare a Unified Development Code for City Council review and adoption (Subdivision, Building, Zoning and Health regulations). 2014

### **High Priority**

- Utilize surveys and other tools to enhance policy and budget recommendations.
- Continue to develop the Continuous Service Improvement (CSI) Program and begin Lean training for all City employees in cooperation with HNI.
- Provide a pavement management program and work to develop a sidewalk management policy and plan. 2013
- Continue to review and target means to improve energy efficiency throughout the organization and City facilities.
- Complete the following Capital Projects:
  - Finalize and implement Combined Sewer Overflow (CSO) timeline. 2013
  - Cedar Street Reconstruction and Trail. 2013-2014
  - Colorado Street Reconstruction. 2013-2014
  - Identify Mississippi Drive Corridor funding mechanisms. 2013-2014
  - Provide support to the Phase III Soccer Committee.
  - Evaluate adding HVAC to City Hall and the Art Center. 2013
  - Prepare cost estimates and a construction timeline for inclusion of reconstruction of Mulberry Street (Houser to Bypass) in the City's CIP.

**City of Muscatine**  
**2013 Core Values, Vision and Mission**  
**Adopted, December 20, 2012**

**Core Values**

- Integrity
- Respect
- Innovation
- Excellence
- Professionalism
- Customer Service
- Fiscal Responsibility

**Vision**

Muscatine is a vibrant river community where a rich tradition of community pride and entrepreneurial spirit has created an outstanding environment to live and work. Muscatine values its history, has a strong sense of community pride, is rich in cultural and economic diversity, and has strong global connections. Muscatine residents, businesses and its local government are engaged and achieve goals through valued partnerships.

**Mission**

The City of Muscatine's mission is to provide a full-range of high quality, effective municipal services; excellent customer service; and sound fiscal management. We engage our community, producing results designed to enhance the safety, well-being and quality of life for our residents and business community. We are advocates for our community, valuing our history and working to shape our future.

# NASRA Issue Brief: State Hybrid Retirement Plans



September 2013

Although hybrid plans have been in place in public sector retirement systems for decades, this plan design has received increased attention in recent years. This new focus occurs as states find that closing their traditional pension plan to future (and, in some cases, existing) employees could increase—rather than reduce—costs,<sup>1</sup> and that providing only a 401(k)-type plan does not meet important retirement security, human resource, or fiscal objectives. While most states have chosen to retain their defined benefit (DB) plan by modifying required employer and employee contributions, restructuring benefits, or both,<sup>2</sup> some also have looked to so-called “hybrid” plans that combine elements of traditional pensions and individual account plans.

Although a hybrid retirement plan may take one of many forms, this brief examines two broad types in use in the public sector. The first is a cash balance plan, which marries elements of traditional pensions with individual accounts into a single plan (see Table 1). The second type combines a smaller traditional DB plan with an individual defined contribution (DC) retirement savings account, referred to in this brief as a “DB+DC plan” (see Table 2). Despite variability among these plans, most contain the core features known to promote retirement security: mandatory participation, shared financing between employers and employees, pooled assets invested by professionals, a benefit that cannot be outlived, and survivor and disability protections.

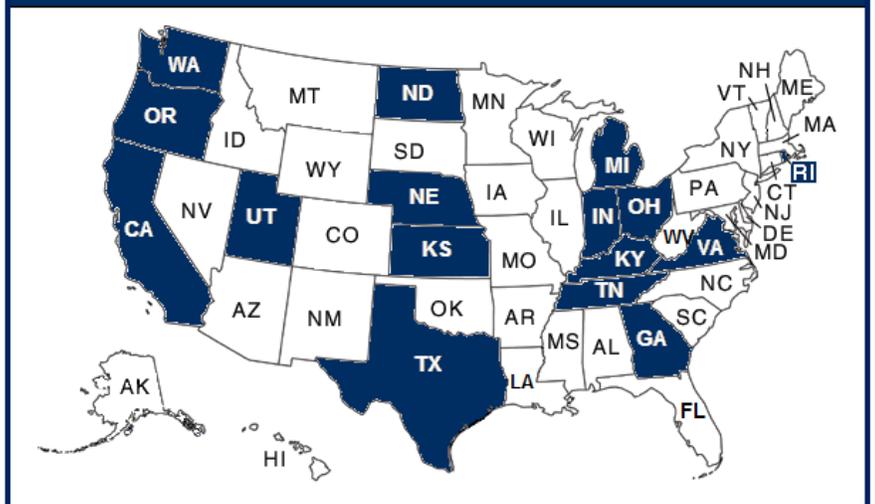
## Mandatory Participation

In the private sector, just one-half of the workforce participates in an employer-sponsored retirement plan,<sup>3</sup> widely recognized as a major factor contributing to the nation’s retirement insecurity. By contrast, for nearly all employees of state and local government, retirement plan participation is mandatory.

Employee participation remains mandatory in state hybrid plans. One partial exception is the Georgia Employees’ Retirement System (ERS), which administers a hybrid plan for many of its members. Participation in the DB component of the plan is mandatory, and participants may elect to not participate in the DC component (although the vast majority have not exercised this election).

Most public employees also have access to a supplemental, voluntary individual retirement savings plan, such as a 401(k), 403(b) or 457 plan. In addition to mandatory participation in the primary plan, some public employers automatically enroll new hires in supplemental retirement savings plans, and participants may opt-out at any time.

Figure 1: States that administer CB or DB+DC plans as a mandatory or optional primary retirement benefit for groups of general or K-12 educational employees



## Shared Financing among Employers and Employees

Nearly all traditional pensions in the public sector require employees to contribute toward the cost of their retirement benefit,<sup>4</sup> and in the wake of the 2008-09 market decline and the Great Recession, many states have increased employees' required contributions.<sup>5</sup>

Hybrid plans also typically employ a shared financing approach to retirement benefits. State cash balance plans, which feature accruals on employee accounts (cash balances), are funded with mandatory contributions from both employees and employers.

DB+DC plans vary regarding the level to which employees and employers are required to contribute toward the DB and DC components. As examples, for the hybrid plans in Indiana, Ohio, Oregon, and Washington, the employer finances the DB component, and the DC component is funded by mandatory employee contributions (ranging from 3 percent to 15 percent of salary). The Michigan Public Schools hybrid plan requires employees to contribute to the DB component on a graduated scale based on pay, and employers finance the remainder; employees are also required to make a mandatory 2-percent-of-salary contribution to the DC component, which employers match at a 50 percent rate.

The Georgia ERS hybrid requires employees to contribute 1.25 percent of salary to the DB component, with the remainder financed by the employer. Employees are automatically enrolled in the DC component at 1% of salary, but may opt out or contribute more. Employers match the first 1 percent of salary and one-half of the next 4 percent of salary voluntarily contributed by the employee to the DC plan.

The Utah retirement system requires employers to contribute 10 percent of salary (12 percent for public safety) toward the DB plan's cost.<sup>6</sup> If the cost is less than the employer's 10 percent contribution rate, the difference goes into employees' individual 401(k) savings account. If the cost of the DB plan exceeds the employer's 10 percent contribution rate, employees must contribute the difference to the DB plan. In either instance, employees may elect to make additional contributions to the 401(k) plan. (Employers in Utah must also contribute five percent of pay to the Utah Retirement System to amortize the unfunded pension liability.)

## Pooled Assets

Retirement assets that are pooled and invested by professionals offer important advantages over individual, self-directed accounts. Combined portfolios have a longer investment horizon, which allows them to be better diversified and to sustain greater market volatility. In addition, the professional asset management and lower administrative and investment costs in pooled arrangements result in higher investment returns.

As with traditional pension plan assets, cash balance plan assets are pooled, invested by professionals, and guarantee annual returns to plan participants. Likewise, DB+DC plans pool assets in the DB component; the manner in which DC plan assets are managed varies. Most plans provide a range of risk-based investment options: some are retail mutual funds and others are maintained by the retirement system and available only to plan participants. Assets in the Oregon DC component, for example, are pooled and invested in a fund similar to the DB plan fund; participants do not have a choice regarding how their DC plan assets are managed. Similarly, Washington State provides an option for employees to invest their DC assets in a fund that emulates the DB plan fund.

### North Dakota PEP

North Dakota offers most of its workers an optional hybrid retirement plan designed to provide greater portability.

Known as "PEP"  
— Portability Enhancement Program —  
North Dakota PERS participants can vest in the employer's portion of the defined benefit plan by participating in a supplemental deferred compensation account, funding a benefit that is more portable than the traditional defined benefit plan and similar to a defined contribution plan.

## Required Lifetime Benefit Payouts

A core objective of retirement plans is to provide lifetime income insurance. A major threat to lifetime income is known as longevity risk, which is the danger of exhausting assets before death. Ensuring lifetime income can be accomplished in part by pooling longevity risk, i.e., distributing that risk among many plan participants. The alternative is an arrangement, embodied in defined contribution plans, in which longevity risk is borne by individuals.

Most public sector plans require some or all of the pension benefit to be paid in the form of an annuity – installments over one’s retired lifetime – rather than allowing benefits to be distributed in a lump sum. This not only better ensures participants will not exhaust retirement assets, but it also reduces costs by allowing retirement assets to be invested as part of the trust over a longer period, and by funding for average longevity rather than the maximum longevity.

As examples, the two statewide cash balance plans in Texas require participant accounts to be paid in the form of a lifetime benefit; county and district employees may elect to receive 100% of their benefit as a partial lump sum upon retirement. The Nebraska cash balance plan gives employees the option of receiving a lifetime benefit payout on any portion of their account balance, and to receive any portion of their retirement benefit as a lump sum.

DB+DC plans normally require the DB portion of the plan to be paid in the form of a lifetime annuity. The DC portion, however, usually may be paid out in various forms including a lifetime benefit, a lump sum or partial lump sum of the account balance, or installments over a certain term (e.g., 5, 10, 15 or 20 years).

## Social Security, Disability and Survivor Benefits

Approximately 25 percent of state and local government employees do not participate in Social Security.<sup>7</sup> While most public sector retirement plan designs seek to replace a targeted percentage of income, they often also reflect the presence or absence of income from Social Security.

Benefits that provide income insurance in the event of death or disability are an important feature among public sector employers, particularly for jobs that involve hazardous conditions. Most public sector retirement plans—whether traditional or hybrid—include survivor and disability benefits, which is a cost-effective method for sponsoring these benefits.

## Conclusion

Nearly every state has made changes in recent years to the retirement plans.<sup>8</sup> While DB plans remain the prevailing model, cash balance and DB+DC plans have been in place for many years in some states, and are new in others. The diversity in public sector plan design reflects the fact that a one-size-fits-all solution does not meet public employer human resource and fiscal objectives. Like defined benefit plans, cash balance and DB+DC plans in the public sector vary from one jurisdiction to the next, and no single design will address the cost and risk factors of every state or local government.

A key factor in evaluating a retirement plan is the extent to which it contains the core elements known to best meet human resource and retirement policy objectives of state and local governments: mandatory participation, shared financing, pooled investments, benefit adequacy, and lifetime benefit payouts. These features are a proven means of delivering income security in retirement, retaining qualified workers who perform essential public services, and providing an important source of economic stability to every city, town, and state across the country.<sup>9</sup>

Most public retirement systems seek to provide a benefit that meets these objectives while balancing risk between employees and employer units. The information in the tables below illustrates the degree to which states are using various cash balance and DB+DC designs to achieve these objectives.

## See Also

National Association of State Retirement Administrators, Resolution 2010-01: *Guiding Principles for Retirement Security and Plan Sustainability*, <http://www.nasra.org/resolutions.htm#201001>

National Association of State Retirement Administrators Issue Brief: Shared-Risk Arrangements, <http://www.nasra.org/resources/issuebrief120801.pdf>

National Conference of State Legislators, State Defined Contribution and Hybrid Pension Plans, [http://www.nasra.org/resources/NCSL\\_DC\\_Hybrid.pdf](http://www.nasra.org/resources/NCSL_DC_Hybrid.pdf)

National Institute on Retirement Security, *A Better Bang for the Buck: The Economic Efficiencies of Pensions*, 2008, [http://www.nirsonline.org/index.php?option=com\\_content&task=view&id=121&Itemid=48](http://www.nirsonline.org/index.php?option=com_content&task=view&id=121&Itemid=48)

National Institute on Retirement Security, *Decisions, Decisions: Retirement Plan Choices for Public Employees and Employers*, 2011, [http://www.nirsonline.org/storage/nirs/documents/Decisions%20Decisions/final\\_decisions\\_decisions\\_report.pdf](http://www.nirsonline.org/storage/nirs/documents/Decisions%20Decisions/final_decisions_decisions_report.pdf)

National Institute on Retirement Security, *Look Before You Leap: The Unintended Consequences of Pension Freezes*, 2008, [http://www.nirsonline.org/index.php?option=com\\_content&task=view&id=173&Itemid=49](http://www.nirsonline.org/index.php?option=com_content&task=view&id=173&Itemid=49)

U.S. Department of Labor, Bureau of Labor Statistics, *National Compensation Survey: Employee Benefits in States and Local Government in the U.S.*, March 2011, <http://www.bls.gov/ncs/ebs/benefits/2011/ownership/govt/table02a.pdf>

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<sup>1</sup> NASRA, “Costs of Switching from a DB to a DC Plan,”

[http://www.wikipension.com/index.php?title=Studies\\_and\\_reports#State\\_Studies](http://www.wikipension.com/index.php?title=Studies_and_reports#State_Studies)

<sup>2</sup> NASRA, “Selected Approved Changes to State Public Pensions to Restore or Preserve Plan Sustainability,”

<http://www.nasra.org/resolutions.htm#200701>

<sup>3</sup> U.S. Department of Labor, Bureau of Labor Statistics, Retirement Benefits: Access, Participation and Take-Up Rates, July 2013,

<http://www.bls.gov/news.release/pdf/ebs2.pdf>

<sup>4</sup> Public Fund Survey, [www.publicfundsurvey.org](http://www.publicfundsurvey.org)

<sup>5</sup> NASRA, “Selected Approved Changes,” *supra*

<sup>6</sup> Employers are also required to contribute an actuarially determined rate each year to amortize the DB plan unfunded liability

<sup>7</sup> U.S. Government Accountability Office, “Social Security: Issues Regarding the Coverage of Public Employees,” 2007,

<http://finance.senate.gov/imo/media/doc/1110607testmn1.pdf>

<sup>8</sup> National Conference of State Legislatures, “State Retirement Legislation,” <http://www.ncsl.org/documents/employ/Basic-Presentation-July2012.pdf>

<sup>9</sup> National Institute on Retirement Security, *Pensionomics: Measuring the Economic Impact of State & Local Pension Plans*, 2009,

[http://www.nirsonline.org/index.php?option=com\\_content&task=view&id=189&Itemid=48](http://www.nirsonline.org/index.php?option=com_content&task=view&id=189&Itemid=48)

**Table 1: Overview of Cash Balance Hybrid Plans**

	<b>TX Municipal</b>	<b>TX County and District</b>	<b>CA State Teachers</b>	<b>NE County and State</b>	<b>KS PERS</b>	<b>KY RS</b>
<b>Year plan approved</b>	1947	1967	1995 for the Cash Balance Benefit Program, 2000 for the Defined Benefit Supplement	2002	2012	2013
<b>Employee groups affected</b>	Mandatory for EEs of 800+ cities that have elected to participate in the TMRS	Mandatory for EEs of 600+ counties and special districts that have elected to participate in the TCDRS	The Cash Balance Benefit Program is optional for part-time and adjunct educational workers; the Defined Benefit Supplement is a cash balance plan provided to full-time educators	Mandatory for county and state EEs* hired after 2002 and those hired previously who elected to switch from the DC plan	Mandatory for EEs of state and local government, including education employees, hired after 1/1/15	Mandatory for new state and local EEs, judges, and legislators who become members on or after January 1, 2014
<b>Contributions</b>	<p>EEs pay 5%, 6%, or 7%, depending on ER* election</p> <p>ER pays 100%, 150%, or 200% of EE rate, also depending on ER election, and adjusted based on unfunded liability</p>	<p>EEs pay 4%, 5%, 6%, or 7% depending on ER election</p> <p>ERs pay normal cost plus amount to amortize the unfunded liability within a 20-year closed period</p>	<p>EEs in the Cash Balance Benefit Program typically pay approximately 4% of earnings, depending on local bargaining agreements; Defined Benefit Supplement EEs contributed 2% from 2001-2010</p> <p>Beginning in 2011, ER and EE contributions to the Defined Benefit Supplement are 8% each on compensation in excess of one-year of service credit</p> <p>ER must contribute at least 4% for Cash Balance Benefit participants and the combined EE/ER rate must be at least 8%</p>	<p>State EEs contribute 4.8%, county EEs contribute 4.5%</p> <p>State contributes 156% of EE rate; counties contribute 150% of EE rate</p>	<p>EEs contribute 6%</p> <p>ER contributes between 3-6% depending on how long the member has been employed</p>	<p>EEs contribute 5%; public safety EEs contribute 8%</p> <p>State contributes 4%; , 7.5% for public safety EEs</p>

	TX Municipal	TX County and District	CA State Teachers	NE County and State	KS PERS	KY RS
<b>Rate of return applied to cash balances</b>	5% (set by statute): The TMRS Board determines the allocation of any excess amounts; the board is authorized to distribute such amounts a) to reduce cities' unfunded liabilities; b) to EEs' individual accounts, and/or c) to a reserve to help offset future investment losses	7% (set by statute): Used to reduce ERs' Members' accounts receive an annual interest credit of 7% as specified by statute	Guaranteed minimum interest rate is based on 30-year U.S. Treasury bonds for the period from March to February immediately prior to the plan year (3% for plan year 2013-14)	Based on the federal mid-term rate plus 1.5%: When the mid-term rate falls below 3.5%, EEs receive a 5% minimum credit rate  When favorable returns combine with an actuarial surplus, the governing board may approve a dividend payment to EE accounts	Members are guaranteed an annual rate of return of 5.25% on their accounts	Employee accounts are guaranteed 4% annual return; accounts also receive 75% of all returns above 4%
<b>Benefit payment options</b>	Annuity with or without a partial lump sum, depending on EE election	Lifetime annuity based on EE final savings account balance, less any EE-elected partial lump-sum payment, plus ER matching	Lump-sum and/or monthly lifetime annuity or period certain monthly annuity	Retiring participants may annuitize any portion of their cash balance and take a lump sum of any remainder. Members electing an annuity may also elect to take a reduced benefit with an automatic annual COLA	Retiring participants may annuitize their cash balance and may elect to take up to 30 percent as a lump sum. Participants may also elect to use a portion of their balance to fund an auto-COLA	Member may choose annuity payments, a payment option calculated as the actuarial equivalent of the life annuity, or a refund of the accumulated account balance
<b>Info online</b>	<a href="http://www.tmrs.com/download/pubs/tmrs_facts.pdf">www.tmrs.com/download/pubs/tmrs_facts.pdf</a>	<a href="http://www.tcdrs.org">http://www.tcdrs.org</a>	<a href="http://www.calstrs.com/sites/main/files/file-attachments/basics_cash_balance_plan.pdf">http://www.calstrs.com/sites/main/files/file-attachments/basics_cash_balance_plan.pdf</a>	<a href="http://www.npers.ne.gov">www.npers.ne.gov</a>	<a href="http://www.kpers.org">http://www.kpers.org</a>	<a href="https://kyret.ky.gov/images/uploads/news/Summary_of_Senate_Bill_2_changes.pdf">https://kyret.ky.gov/images/uploads/news/Summary_of_Senate_Bill_2_changes.pdf</a>

\* EE = employee; ER = employer

**Table 2: Overview of Defined Benefit + Defined Contribution (DB+DC) Hybrid Plans**

	IN Public RS	WA Dept of RS	OH State Teachers' RS	OH Public Employees' RS	OR PERS	GA Employees' RS	MI Public Schools RS	UT RS	RI ERS	VA RS	TN Consolidated Retirement System
<b>Year plan approved</b>	1955	1996	2001	2002	2003	2008	2010	2010	2011	2012	2013
<b>Employee groups affected</b>	Mandatory except for EE hired after 2011 who may elect a DC plan only	Optional for most employee groups	Optional for new hires and non-vested workers since 2001	Optional for new hires and non-vested workers since 12/31/02	Mandatory for all EEs (existing and new) since 2004	Mandatory for new hires since 2009; optional for those hired before 2009 (EE* may opt-out of DC component within 90 days)	Mandatory for all new hires after 06/30/2010	Mandatory for new hires as of 07/01/2011; all EEs may elect DC-only plan	Mandatory for existing members of ERS as of July 1, 2012, as well as new hires (except judges and some public safety members)	Mandatory for most state and local employees, educational employees, and judges, hired on or after 1/1/14 – excluding state police and other law enforcement officers	Mandatory for new state and higher education employees and teachers hired after July 1, 2014; optional for local government entities
<b>Defined Benefit Portion</b>											
<b>DB benefit formula (having met age/service requirements)</b>	1.1% x years of service x final average salary = annual benefit	1% x years of service x final average salary = annual benefit	1% x years of service x final average salary = annual benefit	1% x up to 30 years of service x final average salary + 1.25% x years in excess of 30 x final average salary = annual benefit	Varies depending upon date of hire and which of 3 DB plans EE is enrolled in	1% x years of service x final average salary = annual benefit	1.5% x years of service x final average salary = annual benefit	1.5% x years of service x final average salary = annual benefit  For public safety: 2% x years of service x final average salary = annual benefit	1% x years of service x final average salary = annual benefit	1% x years of service x final average salary = annual benefit	1% x years of service x final average salary (maximum annual pension benefit of \$80,000, indexed by CPI)

	IN Public RS	WA Dept of RS	OH State Teachers' RS	OH Public Employees' RS	OR PERS	GA Employees' RS	MI Public Schools RS	UT RS	RI ERS	VA RS	TN Consolidated Retirement System
<b>DB plan contributions</b>	ER funds the DB benefit	ER funds DB benefit	ER funds DB benefit	ER funds DB benefit	ER funds DB benefit	EE contributes 1.25% and ER contributes the remainder of the annual actuarially determined contribution rate	EE contributes on a graduated scale based on pay; ER contributes remainder	ER pays up to 10% of pay, 12% for public safety (+ 5% to amortize the DB unfunded liability). EEs pay into DB only if the normal cost of the plan exceeds maximum ER contribution	State EEs and teachers contribute 3.75% to the DB plan; municipal EEs contribute 1% or 2% based on COLA election; municipal police and fire contribute 7 or 8% based on COLA election. ER contributions to the DB plan remain unchanged	EE contributes 4% to the DB plan ER contributes an actuarially determined amount to fund the DB benefit (less employer DC contributions)	EE contributes 5% to the DB plan ER contributes 4%
<b>Defined Contribution Portion</b>											
<b>Employer DC plan contributions</b>	None	None	None	None	None	100% ER match on EE's 1st 1% of salary and 50% match on next 4% of salary for a maximum ER contribution of 3%	ER contributes 1% of salary	ER contributes 10% (12% for public safety); if DB cost is more, EE must pay but if less, the difference is applied to EE's DC account	ER contributes 1% to the DC plan for state and local EEs and teachers; 3% for municipal police and fire EEs not covered by Social Security	Mandatory ER contributions of 1% - increases with EE contributions up to 3.5% maximum	ER contributes 5% to the DC plan

	IN Public RS	WA Dept of RS	OH State Teachers' RS	OH Public Employees' RS	OR PERS	GA Employees' RS	MI Public Schools RS	UT RS	RI ERS	VA RS	TN Consolidated Retirement System
<b>Employee DC plan contributions</b>	3% of salary	5% to 15% of salary depending on EE	10% of salary	10% of salary	6% of salary	EE auto enroll at 1% of salary contribution but may vary contribution rate up or down; participants may opt-out of the DC plan within 90 days of their date of hire	2% of salary	EE contributions optional	State and local EEs and teachers contribute 5% to the DC plan; 3% for municipal police and fire EEs not covered by Social Security	EEs may contribute up to 5% to the DC plan (1% minimum)	EEs contribute 2%, with opt-out feature
<b>DC plan investment options</b>	7 options ranging from conservative to aggressive, and 10 target date funds, all administered by the retirement system	Either the total allocation portfolio, which mirrors DB plan fund, or 7 self-directed funds ranging from conservative to aggressive, plus target date funds	8 STRS Ohio-sponsored options ranging from conservative to aggressive plus a guaranteed return option and target date funds	16 OPERS-sponsored funds including core and target date funds, plus a brokerage window	All DC plan contributions are invested in a single, pooled fund that mirrors the DB plan fund	16 options ranging from conservative to aggressive, plus 5 lifecycle funds	Choice of active and passive investment options, target date funds, and a brokerage window	12 risk-based options	12 target date funds and 10 funds ranging from conservative to aggressive	11 options ranging from conservative to aggressive, plus 10 target date funds.	11 target date funds and 15 options ranging from conservative to aggressive

	IN Public RS	WA Dept of RS	OH State Teachers' RS	OH Public Employees' RS	OR PERS	GA Employees' RS	MI Public Schools RS	UT RS	RI ERS	VA RS	TN Consolidated Retirement System
<b>Default DC plan investment options</b>	The Guaranteed Fund, which earns a fixed rate established annually by the Board	Target Date Funds	Earliest target date fund	Target Date Fund closest to the year the participant turns 65	DB plan fund	Lifecycle funds based on age	Target Retirement Fund that matches the year the participant will be eligible to retire	Medium Horizon Fund, which features a diversified investment portfolio	Age appropriate Target Retirement Fund	Target Date Funds based on the participant's age at enrollment	Age appropriate Target Date portfolio
<b>DC plan withdrawal options</b>	Annuity, rollover, partial lump sum and annuity, deferral until age 70½	Lump sum, direct rollover, scheduled payments, personalized payment schedule, and annuity purchase	Annuity including partial lump sum, lump sum or rollover	Annuity, including partial lump sum option plan; deferral until age 70½	Lump sum payment or in installments over a 5-, 10-, 15-, or 20-year period or the EE's anticipated lifespan	Rollover, annuity, lump sum, partial lump sum, installments	Lump sum, consolidation from other plans, direct rollover to an IRA, periodic distribution	After 4-year vesting period: lump sum, partial balance, periodic distribution, direct rollover, direct rollover to an IRA	Lifetime annuity, lump-sum distribution, or distribution in installments (rolling assets into an IRA or leaving assets in the plan)	Depend on the circumstances at termination; DB/DC combo plan requires coordination between the two components with respect to termination options	Lump sum, periodic payments, minimum required distributions, or annuity; beneficiaries may use a combination of more than one payment method
<b>Info online</b>	<a href="http://www.in.gov/inprs/index.htm">www.in.gov/inprs/index.htm</a>	<a href="http://www.drs.wa.gov">http://www.drs.wa.gov</a> (Go to "my plan 3 account")	<a href="http://www.strsoh.org">http://www.strsoh.org</a>	<a href="http://www.opers.org">http://www.opers.org</a>	<a href="http://www.oregon.gov/PERS">http://www.oregon.gov/PERS</a>	<a href="http://www.ers.ga.gov">www.ers.ga.gov</a>	<a href="https://stateofmi.ingplans.com/eportal/welcome.do">https://stateofmi.ingplans.com/eportal/welcome.do</a>	<a href="http://www.urs.org">http://www.urs.org</a>	<a href="https://www.ersri.org/public/documentation/FINAL_RIRSAGuide_January2012.pdf">https://www.ersri.org/public/documentation/FINAL_RIRSAGuide_January2012.pdf</a>	<a href="http://www.varretire.org/employers/members/benefits/hybrid-plan/index.asp">http://www.varretire.org/employers/members/benefits/hybrid-plan/index.asp</a>	<a href="http://treasury.tn.gov/tcrs/PDFs/HybridPlanSummarySheet.pdf">http://treasury.tn.gov/tcrs/PDFs/HybridPlanSummarySheet.pdf</a>

FINANCIAL  
(green)

ACTION NEEDED  
(yellow)

INFORMATIONAL  
(white)

## MEETING ANNOUNCEMENT AND AGENDA BI-STATE REGIONAL COMMISSION

Wednesday, September 25, 2013, 3:30 p.m.  
Scott County Administration Building  
600 West Fourth Street  
Davenport, IA

- | FINANCIAL<br>(green) | ACTION NEEDED<br>(yellow) | INFORMATIONAL<br>(white) |  |
|----------------------|---------------------------|--------------------------|--|
|                      | X                         |                          | 1. <u>Approval of the August 28, 2013 Minutes (See enclosed)</u> – Larry Minard, Chair             |
| X                    | X                         |                          | 2. <u>Treasurer's Report</u> (See enclosed) – Kas Kelly, Treasurer                                 |
|                      |                           |                          | 3. <u>Finance and Personnel Committee/Financial Matters</u> – Chuck Austin, Finance Chair          |
| X                    | X                         |                          | a. <u>Bills</u> (See enclosed)   |
| X                    |                           | X                        | b. <u>Report on Progress on Commission's FY 2014 Program Budget as of 8/31/2013</u> (See enclosed) |
| X                    | X                         |                          | c. <u>Contracts/Grants for Consideration</u> – Denise Bulat, Executive Director                    |
|                      | X                         |                          | 4. <u>Report on Joint Purchasing</u> – Patty Pearson, Senior Planner                               |
|                      |                           | X                        | 5. <u>Air Quality Update</u> – Denise Bulat, Executive Director                                    |
|                      |                           |                          | 6. <u>Questions or Comments by Commissioners</u>   |
|                      |                           |                          | 7. <u>Other Business</u>   |
|                      |                           |                          | 8. <u>Adjournment</u>  |

DB/sg  
Agendas\BSRC Agenda.docx

**NEXT MEETING: Wednesday, October 23, 2013 – 3:30 p.m.**  
Scott County Administration Building  
600 West Fourth Street  
Davenport, Iowa

**MINUTES OF THE  
BI-STATE REGIONAL COMMISSION**

Wednesday, August 28, 2013, 3:30 p.m.  
Scott County Administration Building  
600 West Fourth Street  
Davenport, Iowa

**MEMBERS PRESENT:** Minard – Chair, Austin, Callaway-Thompson, Earnhardt, Goodwin, Gordon, Heninger, Hillman, Hopkins, Kelly, Lawrence, Liddell, O’Boyle, Raes, Sherwin, Tank, Terry, Thodos, Volz, Wells

**MEMBERS ABSENT:** Anderson, Banaszek, Burrage, Crouch, Gallagher, Gluba, Pauley, Rangel, Schloemer, Sorensen, Stoermer, Sunderbruch, Tossell, Washburn, Williams

**OTHERS PRESENT:** Robert Mahrt, City of Aledo Administrator

**STAFF PRESENT:** Bulat, Grabowski, Hunt, McCullough, Moritz, Schmid, Whitson

Chair Minard called the meeting to order at 3:35 p.m. Since there was no initial quorum , the meeting began with Ms. McCullough’s presentation.

1. **Approval of the July 24, 2013 Minutes.** Mayor Thodos moved to approve the minutes of July 24, 2013 as presented. Mr. Gordon seconded the motion, and it passed unanimously.
2. **Treasurer’s Report.** Ms. Kelly presented the Treasurer’s Report for the month ending July 31, 2013, noting an ending total bank and book balance of \$423,918.18. Ms. Kelly moved the report be accepted as written and mailed. Mayor Thodos seconded the motion, and it passed unanimously.
3. **Finance and Personnel Committee.**
  - a. **Bills.** Mr. Austin presented the bills totaling \$76,353.80, as listed on the following bills listing and addendum dated August 28, 2013:

**Bills List**

M.H. Corbin, Inc., traffic counters and software for traffic counters	\$ 6,717.84
City of East Moline, Municipal Code Enforcement System proceeds	3,867.95
Hurt, Norton & Associates, July 2013 legislative technical service (cost reimbursed by participating member governments)	7,750.00
City of Rock Island, Municipal Code Enforcement System proceeds	43,592.01
Thomas A. Skorepa, P.C., Administrative Hearing Officer services (cost reimbursed by MUNICES)	2,870.00

**Addendum**

Bancard Center, VISA charge card expenses related to 1 staff attending the Presenting Data and Information course; 1 staff attending the Economic Development Strategic Planning Training course; Quad City Riverfront	4,837.03
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Council luncheon meeting (cost reimbursed by participants); 1 staff attending the 2013 Transit Midwest Conference; 1 staff attending the 2013 Transit Midwest Conference/2013 FTA Procurement System Review; 1 staff attending the Quad Cities Chamber Annual meeting; Managers & Administrators meeting (cost reimbursed by participants); online services support; 1 staff attending the Floodplain webinar; office supplies

Louisa Ewert, Treasurer			6,718.97
09/2013	Rent	\$4,618.38	
09/2013	Internet Access	88.00	
07/2013	Postage	1,008.23	
07/2013	Printing	748.19	
07/2013	Supplies	76.50	
07/2013	Cell Phone	179.67*	

\*(Partial costs reimbursed by HCEDP/Rural Accelerator Grant)

Mr. Austin moved approval of the bills totaling \$76,353.80 as presented above.  
 Ms. Kelly seconded the motion, and it passed unanimously.

- b. Report on Progress on Commission’s FY 2013 Program Budget as of July 31, 2013. Mr. Austin explained the Program Budget Status Report was mailed in members' packets. The Commission is 8.3% through the fiscal year with 7.4% expended and within budget.
- c. Contracts/Grants for Consideration. Ms. Bulat presented the following contracts/grants over \$7,500 requiring Commission approval:
  - Grant from the Federal Transit Administration, for bus and bus facilities, in the amount of \$439,362 with the timeframe to be determined. These funds will be passed through to the three Quad City transit systems. Resolutions designating signature authority for Transportation Electronic Award & Management Process and authorizing the filing of the application and acceptance of the award were provided.

Ms. Kelly asked if there was money included for administration. Ms. Bulat said staff receive federal transit planning funds that could be used for this purpose, so no additional monies were required. Mr. Austin moved approval of the resolutions designating signature authority and authorizing the filing and acceptance of the grant award as well as the contracts needed with 3 Quad City transit systems to pass the funds to them, and Ms. Sherwin seconded. The motion passed unanimously.

- Contract with Muscatine County for a Comprehensive Plan, in the amount of \$10,000 for the period September 1, 2013 through September 30, 2014.

Mayor O’Boyle moved approval of contract, and Mayor Thodos seconded. The motion passed unanimously.

- Grant from Economic Development Administration for Investing in Manufacturing Communities Partnership as applied for with the Quad Cities Chamber of Commerce in the amount of \$162,500 with match in the amount of \$162,500 for the period November 1, 2013 through October 31, 2014.

It was noted that Bi-State as co-applicant, would administer the project, and implement any agreements needed with the Quad City Chamber and participants to ensure successful completion of the project. In addition, Bi-State would receive administrative funding for the project. Ms. Kelly moved approval of grant, and Mayor Raes seconded. The motion passed unanimously.

4. Status of Quad Cities Area Household Travel Survey and Travel Demand Model Enhancements. Ms. McCullough explained that every five years, Bi-State Regional Commission staff updates the Quad Cities Metropolitan Planning Area Long Range Transportation Plan (LRTP). The update process examines and reflects changes in the metro transportation system. Quad Cities travel needs, traffic safety, and congestion are evaluated. Bi-State's Quad Cities MPO Transportation Policy and Technical Committees oversee Long Range Transportation Plan preparation, and in the next three years, they will work with Bi-State staff to prepare a full draft update by early 2016. The update will include transportation goals and collection of existing and proposed transportation system recommendations.

Ms. McCullough reported that Bi-State Regional Commission is conducting a survey of more than 1,500 households in the Quad Cities in the next two to three months. The survey results will help transportation planners in the metro area better understand how people travel and why. The results will be used by planners and local officials to identify current travel choices and their effect on the transportation system. The data will also help improve regional mobility.

Starting September 9, 2013, households in the Quad Cities will be randomly chosen to participate in this survey. Participation is voluntary but very important. The last survey of this kind was conducted in the late 1960s. Travel patterns and choices have changed greatly since that time. Community participation is critical to the success of the transportation future.

Ms. McCullough stated that ETC Institute has been hired by Bi-State Regional Commission to conduct the survey. Trained interviewers from ETC Institute will call and ask households questions on daily travel. Participants will record the destination address, travel time, mode of travel, and vehicle occupancy for their travels throughout the day. Parents will be asked to keep the travel diary for younger children. The information provided by Quad Citians will be kept confidential and used only in aggregate form for statistical purposes as part of the transportation network modeling process. This effort was funded through an Iowa Clean Air Attainment Program (ICAAP) grant of \$300,000.

The study area boundary includes from Princeton to Buffalo and Eldridge to the Mississippi River in the Scott County, Iowa area. The Illinois portion includes from the Mississippi River south to Oak Grove and Port Byron to Andalusia. It also includes the areas in and around Colona and Coal Valley as a portion of Henry County. Commissioners were asked to share the information within their communities/organizations and encourage participation.

5. Questions or Comments by Commissioners. There were no questions or comments.
6. Other Business. Ms. Bulat introduced, Bryan Schmid and Lindsay Whitson, the newest staff members to Commissioners.
7. Adjournment. The meeting adjourned at 4:10 p.m.

Respectfully submitted,



Phillip Banaszek  
Secretary

**BI-STATE REGIONAL COMMISSION  
TREASURER'S REPORT  
FOR THE MONTH ENDING AUGUST 31, 2013**

	<u>Balance August 1</u>	<u>Deposits</u>	<u>Withdrawals</u>	<u>Balance August 31</u>
<b>GENERAL SAVINGS ACCOUNT BANK &amp; BOOK BALANCE:</b>				
Balance – August 1, 2013	\$ 323,898.25			
Add Deposits		\$ 382,695.77		
Less Transfers			\$ 283,939.11	
Balance – August 31, 2013				\$ 422,654.91
<b>RLF SAVINGS ACCOUNT BANK &amp; BOOK BALANCE:</b>				
Balance – August 1, 2013	\$ 1,169.36			
Add Deposits		\$ 0.15		
Less Transfers			\$ 0.00	
Balance – August 31, 2013				\$ 1,169.51
<b>CHECKING ACCOUNT BANK AND BOOK BALANCE:</b>				
Balance – August 1, 2013	(\$ 4,033.70)			
Add Deposits		\$ 230,772.54		
Less Checks Written			\$ 230,727.81	
Balance – August 31, 2013				(\$ 3,988.97)
<b>PAYROLL ACCOUNT BANK &amp; BOOK BALANCE:</b>				
Balance – August 1, 2013	\$ 2,884.27			
Add Deposits		\$ 102,953.57		
Less Checks Written			\$ 103,054.64	
Balance – August 31, 2013				\$ 2,783.20
<b>INVESTMENT ACCOUNTS BANK &amp; BOOK BALANCE:</b>				
Balance – August 1, 2013	<u>\$ 100,000.00</u>			
State Bank of Orion 06/25/13 – 12/25/13 (.20%)				
Add Investments Made		\$ 0.00		
Less Investments Matured			\$ 0.00	
Balance – August 31, 2013				<u>\$ 100,000.00</u>
<b>TOTAL BANK &amp; BOOK BALANCE:</b>				
Balance – August 1, 2013	<u>\$ 423,918.18</u>			
Deposits in August		<u>\$ 716,422.03</u>		
Withdrawals in August			<u>\$ 617,721.56</u>	
Balance – August 31, 2013				<u>\$ 522,618.65</u>
<b><u>PASS THROUGH FUNDS</u></b>				
<b>BI-STATE RLF ACCOUNT:</b>				
Balance – August 1, 2013	<u>\$ 890,684.12</u>			
Add Deposits		\$ 13,858.81		
Less Withdrawals			\$ 50,070.00	
Balance – August 31, 2013				<u>\$ 854,472.93</u>
<b>MERCER-MUSCATINE RLF ACCOUNTS:</b>				
Balance – August 1, 2013	<u>\$ 8,227.11</u>			
Add Deposits		\$ 2,664.47		
Less Withdrawals			\$ 5.00	
Balance – August 31, 2013				<u>\$ 10,886.58</u>

**BILLS TO BE CONSIDERED FOR APPROVAL  
AT THE SEPTEMBER 25, 2013  
BI-STATE REGIONAL COMMISSION MEETING**

Hurt, Norton & Associates, September 2013 legislative technical service (cost reimbursed by participating member governments)	\$ 7,750.00
Thomas A. Skorepa, P.C., Administrative Hearing Officer services (cost reimbursed by MUNICES)	<u>4,438.00</u>
<b>TOTAL</b>	<b><u>\$12,188.00</u></b>

Additional bills will be listed on the addendum which will be distributed at the meeting.

**BI-STATE REGIONAL COMMISSION  
FY 2013-14 Program Budget Status Report  
Through Month of August – 16.7% of Year**

<b>ADOPTED BUDGET:</b>	<b>\$2,057,347.00</b>	<b>EXPLANATION:</b>
<b>EXPENDED THROUGH AUGUST:</b>	<b>\$325,280.51 (15.8%)</b>	
<b>STAFF LEVEL BUDGETED:</b>	<b>25.25 F.T.E.</b>	
<b>STAFF LEVEL MAINTAINED:</b>	<b>24.75 F.T.E.</b>	

**MEMBER GOVERNMENTS SERVED DIRECTLY AND ACTIVITIES DURING AUGUST**

**ALEDO** – MERGO Participation; Website Support; RLF Coord.; Transit Mobility/HSTP Planning; 2014 Mercer County Events Flyer Coord.; Aerial Photo Coord. Asst.; Economic Development Strategic Plan Presentation

**ALPHA** – HCEDP Participation; Transit Mobility/HSTP Planning.

**ANDALUSIA** – RICWMA Staffing; Riverfront Council; Website Support.

**ANDOVER** – HCEDP Participation; Transit Mobility/HSTP Planning

**ATKINSON** – HCEDP Participation; Website Support; Transit Mobility/HSTP Planning.

**BETTENDORF** – Joint Purchasing; Scott Co. Housing Council; IAQC Transit Planner Coord. & Transit Issues; Riverfront Council; Solid Waste Coord.; I-74 Bridge Coord.; Drug/Alcohol Testing Consort.; RLF Loan Admin./Marketing; Trail Coord.; DOJ Interoperability; Air Quality Asst.; NSBP/EDA Apps; REAP coordination; Trails Counting Asst.; QCICNet; Aerial Photo Coord. Asst.; RDA/SCRA Grant Asst.; Grant Inquiries.

**BLUE GRASS** – Reg. 9 Transportation Coord. & TAP/STP inquiries; Solid Waste Coord.; Website Support; Other Grants Inquiries; Aerial Photo Coord. Asst.

**BUFFALO** – Trail Planning and RFP Asst.; Riverfront Council; Solid Waste Coord.; Aerial Photo Coord. Asst.; RDA Grant Application.

**CAMBRIDGE** – HCEDP Participation; Website Support; Transit Mobility/HSTP Planning.

**CARBON CLIFF** – RICWMA Staffing; Joint Purchasing; Trail Planning; Aerial Photo Coord. Asst.

**COAL VALLEY** – Joint Purchasing; RICWMA Staffing; Aerial Photo Coord. Asst.

**COLONA** – Grants Inquiries (OSLAD & ITEP); Joint Purchasing; Utilities GIS/Mapping Asst.; Hennepin Canal Grant – Mapping Asst.; Zoning Inquiry.

**CORDOVA** – RICWMA Staffing; Riverfront Council; Website Support.

**DAVENPORT** – Joint Purchasing; Riverfront Council, RiverVision; Drug/Alcohol Testing Consort.; Scott Co. Housing Council; Solid Waste Coord.; RLF Loan Admin.; Transit Funding & NTD Asst.; IAQC Transit Planner Coord. and Transit Issues; QCICNET Interoperability Project; BRAC/OEA Coord.; Air Quality Asst.; Davenport Schools Hazard Mitigation Plan; Trail Planning (Goose Creek scope revision); REAP coordination; Legislative Priorities Asst.; IMCP/EDA Grant with QC Chamber; Modern Woodman Park Contest; Aerial Photo Coord. Asst.

**EAST MOLINE** – IL QC Intergov. Comm.; E9-1-1 Coord.; Joint Purch.; RICWMA Staffing; RMS Coord.; Riverfront Cncl.; Interoperability Project; RLF Admin.; MUNICES; Air Quality Asst.; Trail Planning; Consol. Disp. Study Asst.; QCICNet; Econ. Dev. Strategic Plan; Aerial Photo Coord. Asst.

**ELDRIDGE** – Solid Waste Coord.; Drug & Alcohol Consort.; Website Support; Aerial Photo Coord. Asst.

**FRUITLAND** – Region 9 Transportation Coord.; Solid Waste Coord.

**GALVA** – Broadband Coord.; Transit Mobility/HSTP Planning; HCEDP.

**GENESE** – HCEDP Part.; Website Support; Trails Planning; Transit Mobility/HSTP Planning; TIF District, Zoning, and Future Land Use Mapping Asst.; ITEP Inquiry

**HAMPTON** – RICWMA Staffing; Riverfront Council; Website Support.

**HENRY COUNTY** – Joint Purch.; HCEDP Part.; Transit Mobility/HSTP Plan; Trail Coord.; Zoning Reviews; Workforce Dev. Board; Legislative Priorities Asst.; Comp. Plan & Zoning Map; EDA/USDA Grant; HCEDP Graphics & Mapping Asst.; Evac. Plan; Fact Sheet Update, Illinois Grants for Local Gvts.; Go Rail Mtg.; Aerial Photo Coord. Asst.

**KEWANEE** – Transit Mobility/HSTP Planning.

**LECLAIRE** – Joint Purchasing; Riverfront Council; Solid Waste Coord.; Trail Planning; Aerial Photo Coord. Asst.

**LONG GROVE** – Reg. 9 Trans. Coord.; Solid Waste Coord.; Website Support; Aerial Photo Coord. Asst.

**MCCAUSLAND** – Reg. 9 Trans. Coord., Solid Waste Coord.; Stormwater Meeting; Brochure Design; Comprehensive Plan; Funding Inquiry.

**MILAN** – Joint Purchasing.; RICWMA Staffing; IL QC Intergov. Comm.; E9-1-1 Coord.; RMS Coord.; RLF Admin.; Interoperability Project; MUNICES Coord.; Cons. Dispatch Study Asst.; QCICNet.

**MOLINE** – MUNICES Coord.; IL QC Intergov. Comm.; E9-1-1 Coord.; Joint Purchasing; I-74 Bridge Coord & Southern Section; RICWMA Staffing.; RMS Coord.; Riverfront Cncl.; RLF Loan Admin.; Trails Coord & Trails Counting Asst.; Interoperability Project; Rail Coord.; Air Quality Asst.; Park/Rec Planning; ITEP Grant Appl.; Cons. Dispatch Study Asst.; QCICNet.; RiverVision; Aerial Photo Coord. Asst.

**MUSCATINE CITY** – Trail Planning; Reg. 9 Transportation Coord.; Solid Waste Coord.; Joint Purchasing; Air Quality Asst.; RLF Coord.; Aerial Photo Coord. Asst.;

**MUSCATINE COUNTY** – Trails Planning; Website Support/Development/Redesign; Reg. 9 Coord.; Solid Waste Coord.; Joint Purch.; Transit Mobility Coord.; Hazard Mitigation Plan; Air Quality Asst. & USEPA Mtg.; OEA Grant Coord.; EDA RLF Coord.; Comprehensive Plan Agreement; Aerial Photo Coord. Asst.

**NEW BOSTON** – MERGO Participation; Website Support; Grant Research; 2014 Mercer County Events Flyer Coord.

**OAK GROVE** – E9-1-1 Coord.; Consolidated Dispatch Study.

**ORION** – HCEDP Participation; Website Support; Transit Mobility/HSTP Planning; Water System Map Update.

**PORT BYRON** – RICWMA Staffing; Riverfront Council; ED Strategy; GRT- ROW Issues

**PRINCETON** – Riverfront Council; Solid Waste Coord.; Trail Planning; Special Census Asst.; Economic Development Presentation; Aerial Photo Coord. Asst.

**RAPIDS CITY** – RICWMA Staffing; Riverfront Council.

**RIVERDALE** – Riverfront Council; Trail Coord & Trails Counting Asst.; Solid Waste Coord.; Website Support; Haz Mit Plan.

**ROCK ISLAND CITY** – IL QC Intry. Comm.; E9-1-1 Coord.; Joint Purchasing; Riverfront Council; RiverVision; RICWMA Stfg.; MUNICES Coord.; RMS Coord.; RLF Loan Adm.; Interop. Proj.; Air Quality Asst.; Workforce Dev. Bd.; Consol. Dispatch Study App; QCICNet; Aerial Photo Coord. Asst.; Kapheim Memorial Race Map.

**ROCK ISLAND COUNTY** – E9-1-1 Coord.; LEPC Committee; IL QC Intergov. Comm.; RICWMA Stfg.; Electronic Collection Event & Website Support; Joint Purchasing; Trail Coord.; WIB Part.; RMS Coord.; Transit Mobility/HSTP Planning; Passenger Rail; Air Quality Asst.; Legislative Priorities Asst.; QCICNet; Evacuation Plan; Forest Preserve Planning & Map; Hazard Mitigation Png. Appl.; QC Health Initiative; Stationery Graphics – Various Depts., Health Dept. & Forest Preserve

**SCOTT COUNTY** – Financial Management - Scott Co. KIDS; Scott Co. Hsg. Cncl.; Joint Purchasing; I-74 Brgd. Coord.; Trail Png.; RLF Admin.; Reg. 9 Transportation; Transit Mobility/HSTP Planning; Interop. Project; Goals Booklet; OEA; Passenger Rail; Housing Assessment; Budget Report; Air Quality Coord.; Solid Waste Coord.; Aerial Photo Coord. Asst.; QC Health Initiative.

**SHERRARD** – MERGO Participation; Website Support; Transit Mobility/HSTP Planning; Joint Purchasing Council Info; 2014 Mercer County Events Flyer Coord.

**SILVIS** – E9-1-1 Coord.; Joint Purchasing; IL Intergov. Comm. Coord.; RICWMA Stfg.; RMS Coord.; CDAP Grant Admin.; Trail Planning; Consol. Dispatch Study App.; QCICNet; Aerial Photo Coord. Asst.; Main Street Businesses; TIF/Enterprise Zone & Utilities GIS/Mapping Asst.

**VIOLA** – MERGO Participation; Transit Mobility/HSTP Planning; Logo Development; 2014 Mercer County Events Flyer Coord.

**WALCOTT** – Reg. 9 Transportation; Solid Waste Coord.; Trail Coord.; RLF Marketing; Aerial Photo Coord. Asst.

**WEST LIBERTY** – Reg. 9 Transportation; Solid Waste Coord.; Website Support; Muscatine Co. Haz Mit Plan; Air Quality Coord.

**WILTON** – Reg. 9 Transportation; Solid Waste Coord.; Muscatine Co. Haz Mit Plan; EDA Application; Air Quality Coord.; Req. for Water/Sewer System Maps.

**WINDSOR** – HCEDP Participation; Transit Mobility/HSTP Planning; Zoning Inquiry; 2014 Mercer County Events Flyer Coord.

**WOODHULL** – HCEDP Participation; Transit Mobility/HSTP Planning.

## **Bi-State Report – August**

**COMMUNITY/ECONOMIC DEVELOPMENT:** Attended Henry County Economic Development Partnership (HCEDP) meetings. Continued administration of EDA/USDA Rural Jobs and Innovation Challenge Grant Program on behalf of multiple member governments in Henry, Mercer, and Rock Island Counties. Attended IA RELAT meetings. Assisted with economic development funding program information for legislative efforts. Attended Iowa Regional Council, Illinois Regional Council, Northwest Municipal Association, and Quad City Health Initiatives-NPAW Panel meetings. Assisted members with legislative priorities. Finalized update of 2013 CEDS Progress Report. Scheduled 2013-14 APA audio-conference training series for planning commissioners/planners/citizen planners. Provided data for the QC Chamber's Economic Visioning project. Became co-applicant with QC Chamber on EDA's Investing in Manufacturing Community Partnership Grant; redrafted grant forms and provided to EDA.

### **DATA/GRAPHICS/MAPPING/ON-LINE SERVICES:**

**Data Center:** Data Center: Staff responded to approximately 18 data and map requests in August 2013 including 6 from local governments, 6 from businesses, 2 from non-profits, 2 from private citizens, 1 from media, and 1 from other. The data section of the Bi-State website had 733 page views. The data warehouse site ([www.greaterqcregion.org](http://www.greaterqcregion.org)) had 327 visits and 453 page views. Staff completed the 3rd Quarter ACCRA (<http://www.coli.org/>) cost of living survey for the region.

**Graphics/Mapping:** 2013 QC Street Map Update (Folded & Wall Versions) and Distribution of 2008-09 Edition; 2014 Aerial Photo Flyover Coordination; 2045 Long Range Transportation Plan Coordination; Crash Study Data and Mapping; ICAAP Grant Mapping Asst.; QC Chamber Certified Sites GIS/Mapping Asst.; Transit Mapping Asst.; Travel Model Data and GIS Assistance; Update/Maintain GIS Data for Street Centerlines, Traffic Counts, Federal Functional Class Routes, Corporate Limits, Landmarks, Rail, Trails, and other layers.

**www.bistateonline.org.** Top files downloaded and pages viewed for August 2013 include: BSRC Home Page (3,023); QCTransit.com (1,592); Quad Cities Metro Area Street Map (1,161); Transit Development Plan (TDP) (1,079); Scott County Evacuation Plan, Final (687); CEDS Progress Report 2013 (531); The Loop Rider's Guide Insert (495); BSRC Contact Page (271); Joint Purchase Program (263); and 2040 Quad Cities Long Range Transportation Plan (154);. Watch for new website coming soon!

**ENVIRONMENTAL, RECREATION, RIVERFRONT SERVICES:** Responded to inquiries & assisted with trail/recreation project funding assistance/grants. Served RICWMA with coordination of meetings, oversight and management of waste disposal and recycling programs, reporting, and overall agency administration. Responded to RICWMA telephone inquiries from general public & media concerning solid waste and recycling issues. Attended River Action meetings. Continued coordination of issues related to Bi-State Region Clean Air Partnership and strategies for emission reduction. Continuing "Make Air Quality Visible" strategic plan update process. Continued multi-jurisdictional hazard mitigation planning. Organized bi-monthly meeting of Quad City Riverfront Council.

**INTERGOVERNMENTAL FORUMS AND REGIONAL SERVICES:** Continued assistance to the Joint Purchasing Council (JPC). Worked on the following bids: 2014 Office Calendars; Ice Melt, Fall Printer Supplies; Fall Copier & Plotter Paper; Fall Printer Supplies. Staffed Quad Cities Area intergovernmental forums and meetings of area recreation directors, managers and administrators, and chief elected officials. Continued coordination and planning for the awarded DOJ interoperability grant. Assisted with Rock Island Arsenal issues.

**REVOLVING LOAN FUND (RLF):** Administered Bi-State RLF Program: Prepared meeting cancelation and financial summary report. Closed on Moline company loan. Provided information to potential applicants. Continued receiving job creation information from active companies. Administered Mercer/Muscatine RLF Program: Provided information to potential applicants.

**TRANSPORTATION PLANNING, PROGRAMMING AND PROJECT DEVELOPMENT:** Attended related meetings, presented information, and continued staff coordination of river crossing issues. Initiated outreach for household survey and continued travel model enhancements project with consultant team. Worked on urban 2045 LRTP travel model development. Continued IL Region evacuation planning effort. Coordinated traffic & trails analyses, and data requests. Continued preparation of urban crash report. Participated in Iowa-Illinois interdisciplinary traffic safety teams meeting. Monitored status of MAP-21 implementation. Conducting urban and Region 9 Transportation Alternatives Program project selection process and Region 9 STP solicitation for projects. Served ITEP grant requests/inquiries. Prepared monthly reports of federal transportation programs, coordinated related funding/reporting. Continued air quality emission reduction efforts and organized bi-monthly meetings of Air Quality Task Force. Worked on connections of American Discovery Trail (ADT)/Grand Illinois Trail and MRT, and attended related meetings, as well as other trail planning and grant assistance. Organized bi-monthly meeting of the Bi-State Regional Trails Committee. Coordinated Bi-State Drug and Alcohol Testing Consortium and continued random testing program. Monitored urban and Iowa Region 9 FY14 Transportation Planning Work Program and FFY14-17 TIPs, and need for data entry in Iowa TPMS as part of transportation improvement programming. Administered IAQC and Illinois Region 2 transit coordinator positions. Facilitated MAP-21 transit funding issues and suballocations and assisted with NTD data analysis. Served inquiries and assisted with transportation funding programs and transportation information for legislative efforts. Participated in statewide human services transportation meeting with independent living centers, RIM Advisory Council meeting, and RPA Directors/TAPE quarterly meetings.