

# Consent Agenda

February 22, 2022

MET IN REGULAR SESSION

The Board of Supervisors met in regular session at 10:00 A.M. All members present, except Justin Schultz. Chairman Wichman presiding.

PLEDGE OF ALLEGIANCE

1. CONSENT AGENDA

After discussion was held by the Board, a Motion was made by Shea, and second by Belt, to approve:

- A. February 14, 2022, Minutes as read.
- B. Sheriff/Communications – Employment of Marie Morris as 911 Telecommunicator.

UNANIMOUS VOTE. Motion Carried.

2. SCHEDULED SESSIONS

Motion made by Shea, second by Belt, to approve Second Consideration of **Ordinance No. 2022-01**, an Ordinance to amend the Official Zoning Map of Pottawattamie County, Iowa, by changing the district designation of approximately 35.84 acres from a Class A-3 (Riverfront and Agricultural Production) to a Class I-1 (Limited Industrial) District; and to adopt **Ordinance No. 2022-01** into law.

POTTAWATTAMIE COUNTY, IOWA  
ORDINANCE NO. 2022-01

**AN ORDINANCE** to amend the Official Zoning Map of Pottawattamie County, Iowa, by changing the district designation of approximately 35.84 acres from a Class A-3 (Riverfront and Agricultural Production) District to a Class I-1 (Limited Industrial) District.

**BE IT ORDAINED BY THE BOARD OF SUPERVISORS OF POTTAWATTAMIE COUNTY, IOWA**

**SECTION 1 - AMENDMENTS:** That the Official Zoning Map, as adopted by reference in Section 8.003.020 of the Pottawattamie County, Iowa, Zoning Ordinance, be and the same is hereby amended by changing the district designation from its present designation of a Class A-3 (Riverfront and Agricultural Production) District to a Class I-1 (Limited Industrial) District of certain real estate, as shown on the attached plat and which is legally described as follows:

17-74-43 SE SW EXC RR

**SECTION 2 - SEVERABILITY:** That should any section or provision of this Ordinance be declared by a court of competent jurisdiction to be invalid, that decision shall not effect that validity of the Ordinance as a whole or any part thereof, other than the part so declared to be invalid.

**SECTION 3 - REPEAL OF CONFLICTING ORDINANCES:** That all ordinance or parts of ordinances in conflict with the provisions of this Ordinance are hereby repealed.

**SECTION 4 - EFFECTIVE DATE:** This Ordinance shall be in full force and effect after its passage, approval and publication as provided by law.

PASSED AND APPROVED.

ROLL CALL VOTE

	AYE	NAY	ABSTAIN	ABSENT
_____ Tim Wichman, Chairman	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____ Justin Schultz	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____ Lynn Grobe	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
_____ Brian Shea	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Motion made by Shea, second by Belt, to go out of Closed Session.

Roll Call Vote: AYES: Wichman, Belt, Grobe, Shea. Motion.

Motion made by Shea, second by Grobe, to go into Closed Session pursuant Iowa Code 21.5(1)(j) for discussion and/or decision on the purchase or sale of particular real estate.

Roll Call Vote: AYES: Wichman, Belt, Grobe, Shea. Motion Carried.

Motion made by Grobe, second by Belt, to go out of Closed Session.

Roll Call Vote: AYES: Wichman, Belt, Grobe, Shea. Motion.

Motion by Belt, second by Shea, to move forward with what was discussed in closed session.

UNANIMOUS VOTE. Motion Carried.

## 6. BUDGET DISCUSSION

Discussion only. No action taken.

## 7. ADJOURN

Motion made by Belt, second by Shea, to adjourn meeting.

UNANIMOUS VOTE. Motion Carried.

THE BOARD ADJOURNED SUBJECT TO CALL AT 12:31 P.M.

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Tim Wichman, Chairman

ATTEST: \_\_\_\_\_

Melvyn House, Auditor

APPROVED: March 1, 2022

PUBLISH: X

# **Scheduled Sessions**

**Brenda Mainwaring/President, Iowa West  
Racing Association.**

**Iowa West Racing Association updates.**



**THE  
INNOVATION  
GROUP**

# **Iowa Statewide Gaming Market Assessment and Socio-Economic Impact Analysis**

Prepared for:

IOWA RACING AND GAMING COMMISSION

December 2021

Prepared by:

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# EXECUTIVE SUMMARY

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## *Introduction*

The Innovation Group was retained by the Iowa Racing and Gaming Commission (IRGC) to conduct a statewide gaming market analysis and socio-economic impact study. The gaming market analysis assesses historical trends, including the impact of the pandemic, and a three-year revenue forecast for the following three scenarios:

1. A Baseline scenario to serve as the benchmark for measuring the impact of Scenario 2.
2. The impact on Iowa casinos of impending new casino development in Nebraska, Rockford, Illinois and Beloit, Wisconsin.
3. The impact on the Iowa gaming market if a casino is developed in Cedar Rapids.

The Gaming Market Analysis is conducted with the use of a drivetime gravity model. Gravity models are commonly used in location studies for commercial developments, public facilities and residential developments. The model is an analytical tool that defines the behavior of a population based on travel distance and the availability of goods or services at various locations; it quantifies the effect of distance on the behavior of a potential patron and considers the impact of competing venues.

The socio-economic impact study is comprised of two sections, economic and social/community. The Economic Impact Analysis quantifies the direct, indirect and induced effects of the gaming industry (collectively, casinos and racetracks) on the Iowa economy in terms of employment, income, GDP, and total output. For ongoing impacts from operations of gaming facilities, we have used calendar year 2019 because of the disruptions of the pandemic, which forced casinos to close for two months in 2020. For one-time construction impacts, we compiled costs for the 2012-2021 period; the 2014 economic impact study assessed construction impacts through 2011. Inputs for the IMPLAN modeling were derived from data from operators and the IRGC's "2019 Economic Reports."

The Social and Community Impact Analysis assesses the impacts of casinos on factors such as problem gambling, crime, local businesses, community services, household finances and health, and unemployment.

## *Gaming Market Analysis*

### *Introduction*

The gaming market analysis focused on two critical questions facing Iowa: 1) what are the projected impacts from new casino development in adjacent states, particularly Nebraska? and 2) what would be the projected impact on the Iowa gaming industry if a casino were to be developed in Cedar Rapids?



There are six existing licensed racetracks eligible for casino gaming in Nebraska, all in eastern Nebraska. The two tracks of primary concern to Council Bluffs casinos are Horsemen’s Park in Omaha and Lincoln Race Course, both of which are proposed to be \$220 million casinos operated under the WarHorse brand, a subsidiary of Ho Chunk, Inc (Nebraska tribe). The other track of most concern to Iowa is Atokad Park, just across the border from Hard Rock Sioux City. The three other licenses are Columbus Exposition and Racing west of Omaha, Fonner Park in Grand Island, and Fairplay Park in Hastings.

Two new casino developments in Rockford, Illinois and Beloit, Wisconsin have implications for eastern Iowa casinos. A Hard Rock casino has been approved for Rockford, and a Ho-Chunk Nation (Wisconsin tribe) casino has received approval by the Department of Interior and the Wisconsin governor.

Voters in Linn County recently re-affirmed approval for casino development, and officials in Cedar Rapids have been in support of development. This market study assesses the impact on existing Iowa casinos and the net Iowa gain in gaming revenue from a Cedar Rapids casino.

### Baseline Calibration

The gravity model was calibrated for last 12 months (through October 2021) using publicly reported data from the Iowa Racing & Gaming Commission and Illinois Gaming Board and proprietary player data from operators. Competitive casinos were input into the model as discussed in the Competitive Environment section. To protect confidentiality, we have grouped the results by region rather than individual properties.

Table 1: Regional Groupings

Council Bluffs	Northwest	North	Central	East Central	Southeast	Northeast
Ameristar CB	Hard Rock Sioux City	Wild Rose Emmetsburg	Wild Rose Jefferson	Isle Waterloo	Catfish Bend	Diamond Jo Dubuque
Harrah's CB	Grand Falls	Diamond Jo Northwood	Lakeside	Riverside	Isle Bettendorf	Q Casino
Horseshoe CB			Prairie Meadows		Rhythm City	Casino Queen
					Wild Rose Clinton	

Source: The Innovation Group

As in the rest of the nation, the Iowa gaming industry remains in a state of flux from the impacts of the pandemic. While gross gaming revenue (GGR) is actually higher than pre-pandemic levels, visitation has declined by over 17%. As a result, casino win per visit (WPV) has increased dramatically, to \$96 from \$73 in 2019. In the calibration of the model, we have mirrored the decline in visitation by reducing propensity and frequency from normative pre-COVID levels while increasing WPV.

Table 2: Iowa Commercial Casinos: Recent Trends

	GGR (MM)	Visits (000s)	WPV	Positions	WPP
FY 2019	\$1,457	19,863	\$73	17,953	\$222
FY 2021	\$1,575	16,395	\$96	18,008	\$240
<i>Change</i>	<i>8.1%</i>	<i>-17.5%</i>	<i>31.0%</i>	<i>0.3%</i>	<i>7.8%</i>

Source: IRGC. The Innovation Group

It is expected that 2024 would be the first full year of operation for Nebraska casinos; therefore, we use 2024 for the future baseline model, which becomes the benchmark against which to measure the impact of Nebraska, Rockford, and Beloit.

What the gaming market will look like in three years is difficult to estimate based on current data. Nationwide, casinos have seen higher revenues from fewer gaming positions and fewer visits. Operators and analysts are doubtful this condition will sustain, but it is the million-dollar question how the gaming market will stabilize once federal relief spending cycles through and as other travel and leisure options open up (for example, cruise ships have recently started sailing again).

Analysts have noted that savings boosts from relief spending have started to taper off, and that for lower income households the extra spending power is expected to run out by early 2022. Therefore, in our forecasting we have assumed GGR will taper off by the second half of 2022.

For the 2024 Baseline model we have assumed that WPV will decline from current levels but still remain higher than pre-COVID levels. On the other hand, we have assumed that some but not all casino patrons who currently are staying home will return; therefore, we have raised propensity and frequency but not to pre-COVID levels. In summary, the model is showing an increase in visitation of 10% but a decline in WPV of 12.4% for a 3.4% decline in gaming revenue compared to 2021's record setting level.

## Forecast Results

Table 3 shows the three-year forecast for Iowa statewide gaming revenue (excluding sports betting) under the three competitive scenarios. Hard Rock Rockford opened in November 2021 in a temporary casino with 635 slots and electronic table positions; a small impact is assumed for 2022 compared to the Baseline. The full permanent Rockford casino is scheduled to open in 2023; Nebraska and Beloit are estimated to open by 2024.

Table 3: Iowa Statewide Slot & Table Gaming Revenue Summary (000s)

\$000s	Baseline Status Quo	With NE, Rockford & Beloit	With Cedar Rapids
2021*	\$1,688,810	\$1,688,810	\$1,688,810
2022	\$1,668,585	\$1,664,413	\$1,664,413
2023	\$1,598,403	\$1,575,699	\$1,575,699
2024	\$1,631,023	\$1,375,286	\$1,426,372

Source: The Innovation Group; \*Last 12 months thru Oct.

Table 4 shows the results by Region for Scenario 1, impact of Nebraska, Rockford & Beloit. The impact of new casino development in adjacent states is estimated to result in a \$256 million or 15.7% decline in Iowa GGR compared to a Baseline 2024 forecast.

Table 4: Iowa Gaming Revenue Summary by Region (000s): Scenario 1 Results

	Calibration 2021*	Base 2024	With NE, Rockford & Beloit	Impact	% Impact
Council Bluffs	\$438,845	\$427,995	\$266,277	-\$161,718	-37.8%
Northwest	\$178,312	\$172,429	\$141,282	-\$31,146	-18.1%
North	\$132,274	\$125,940	\$123,673	-\$2,268	-1.8%
Central	\$301,996	\$296,793	\$287,241	-\$9,552	-3.2%
East Central	\$218,682	\$210,271	\$206,516	-\$3,755	-1.8%
Southeast	\$272,236	\$257,385	\$230,892	-\$26,493	-10.3%
Northeast	\$146,466	\$140,209	\$119,404	-\$20,806	-14.8%
Total	\$1,688,810	\$1,631,023	\$1,375,286	-\$255,737	-15.7%

Source: The Innovation Group; \*Last 12 months thru Oct.

Table 5 shows the results by Region for Scenario 2, impact of Cedar Rapids on existing Iowa casinos. A Cedar Rapids casino is estimated to result in a \$61 million decline in GGR at existing Iowa casinos.

Table 5: Iowa Gaming Revenue Summary by Region (000s): Scenario 2 Results Impact on Existing

	With NE, Rockford & Beloit	Cedar Rapids Impact on Existing	Impact	% Impact
Council Bluffs	\$266,277	\$265,942	-\$335	0%
Northwest	\$141,282	\$141,195	-\$87	0%
North	\$123,673	\$122,154	-\$1,518	-1%
Central	\$287,241	\$283,520	-\$3,722	-1%
East Central	\$206,516	\$163,515	-\$43,001	-21%
Southeast	\$230,892	\$223,914	-\$6,978	-3%
Northeast	\$119,404	\$113,737	-\$5,666	-5%
Total	\$1,375,286	\$1,313,978	-\$61,308	-4%

Source: The Innovation Group

Including the GGR forecast for Cedar Rapids in the East Central region, total statewide commercial gaming revenue in Iowa is estimated to increase by \$51 million with the addition of a Cedar Rapids casino to the market.

Table 6: Iowa Gaming Revenue Summary by Region (000s): Scenario 2 Results including Cedar Rapids

	With NE, Rockford & Beloit	With Cedar Rapids Included	Impact	% Impact
Council Bluffs	\$266,277	\$265,942	-\$335	0%
Northwest	\$141,282	\$141,195	-\$87	0%
North	\$123,673	\$122,154	-\$1,518	-1%
Central	\$287,241	\$283,520	-\$3,722	-1%
East Central	\$206,516	\$275,909	\$69,392	34%
Southeast	\$230,892	\$223,914	-\$6,978	-3%
Northeast	\$119,404	\$113,737	-\$5,666	-5%
<b>Total</b>	<b>\$1,375,286</b>	<b>\$1,426,372</b>	<b>\$51,086</b>	<b>4%</b>

Source: The Innovation Group

## Sports Betting

Table 7 shows the three-year forecast for Iowa statewide sports betting net receipts under the three competitive scenarios. Illinois allows mobile sports betting but Nebraska will only allow retail. Sports betting continues to ramp up in Iowa, particularly internet.

Table 7: Iowa Statewide Sports Betting Net Receipt Summary (000s)

\$000s	Baseline	With NE, Rockford & Beloit	With Cedar Rapids
<b>Retail</b>			
2021*	\$28,161	\$28,161	\$28,161
2022	\$28,845	\$24,600	\$25,965
2023	\$29,546	\$25,198	\$26,596
2024	\$30,265	\$25,810	\$27,242
<b>Internet</b>			
2021*	\$80,496	\$80,496	\$80,496
2022	\$110,617	\$110,252	\$113,559
2023	\$130,990	\$130,558	\$134,474
2024	\$147,781	\$147,293	\$151,712
<b>Total</b>			
2021*	\$108,657	\$108,657	\$108,657
2022	\$139,462	\$134,851	\$139,524
2023	\$160,536	\$155,755	\$161,070
2024	\$178,045	\$173,103	\$178,954

Source: The Innovation Group; \*Last 12 months thru Nov.

Sports wagering brings a net positive impact on Iowa casinos. Sports wagering attracts a new demographic, tending to skew younger and more male than slot machine patrons. Online sports betting dominates the sports market, comprising 74% of the sports revenue over the last twelve months. However, retail sports betting provides diversity to the casino amenity set, and it attracts out-of-state players as well. Notably, the three strongest performing retail sports books in Iowa are Ameristar, Horseshoe, and Diamond Jo Worth, all serving out-of-state markets without retail options available in their states.

Over the next three years, we expect sports wagering to grow in popularity, but otherwise to be relatively static in the state. From a competitive perspective, Nebraska's sports betting launch will impact the Council Bluffs market, and a potential Minnesota bill could impact retail betting at Diamond Jo Worth. From a product standpoint, the industry abounds with mergers and acquisition opportunities. We may see some consolidation in the space, though we also note that there are more than a few global operators seeking entry into emerging US markets. Additionally, several technology companies are developing innovative products in the sports betting space, as one key way that sportsbooks can compete for market share is through a differentiated betting "menu."

## *Economic Impact Analysis*

### **Ongoing Impacts from Operations**

For ongoing impacts from operations of gaming facilities, we have used an Analysis-by-Parts (ABP) method with inputs for calendar year 2019, which was selected since casinos were closed for two months in 2020. The gaming industry remains in flux from the disruptions of the pandemic. Although gaming revenue in 2021 has recovered to levels above 2019, employment has lagged as fewer table games are in operation in many casinos and amenities such as buffets and entertainment remain closed or with reduced operating hours. This lag is by and large involuntary, as operators have unanimously noted tight labor markets, low unemployment, and difficulty in attracting workers.

Analysis-by-Parts separates out the multiplier effects into individual impact components, Intermediate Expenditure and Labor Income. This allows for more flexibility and customization capabilities in the analysis to model actual business operations. We used a Labor Income Change activity to analyze the impact of the payroll of casino operations necessary to meet the demand or production level. The direct input for Labor Income in the casino analysis consisted of Employee Headcounts and Employee Compensation as reported by the Iowa gaming industry, including tips estimated by the Innovation Group. For Intermediate Expenditures (IE), we import an Industry Spending Pattern to specify the goods and services of industry purchases needed for the sector 503 - Gambling industries.

The ABP method results in a much more conservative and we believe realistic estimate of the indirect and induced (or multiplier) effects of the operation of the casino component. The inputs into the IMPLAN casino model consist solely of Iowa employee headcounts and compensation as well as purchases by the casino of goods and services in Iowa. Operating profit and gaming taxes

are excluded from the multiplier effect, although they are included in the displays of direct value added and output.

Inputs for the modeling were derived from data from the IRGC’s “2019 Economic Reports,” which reports total payroll of \$331 million, and the IRGC Annual Report 2019, which reports that of 8,511 people employed by the casinos and racetracks, 6,246 or 73% were Iowans. Only the Iowa portion of employment was utilized in the modeling.

Table 8: Casino & Racetrack Employment Data 2019

Salaries & Wages	\$233,389,071
Employee Benefits	\$60,248,124
Payroll Taxes	\$37,401,181
Total Payroll & Related Expenses	\$331,038,376
Iowa Employment	6,246
Iowa Payroll	\$242,940,394

Source: IRGC, The Innovation Group.

The “2019 Economic Reports” reported a total operating spending within Iowa of \$244 million.

Table 9: Casino & Racetrack Expenditure Data 2019, Iowa Vendors Only

Gaming related equipment & supplies	8,540,232
Other supplies & Services	235,689,499
Total Operating Expenses	244,229,731

Source: IRGC, The Innovation Group.

The following table shows the total inputs utilized in the IMPLAN modeling for ongoing operations. An estimate of tips for table dealers and food and beverage servers of \$28.8 million was added to the \$243 million in payroll for total employment compensation of \$271.7 million.

Table 10: Direct Effect Inputs Iowa Statewide – Ongoing Operations

<i>Industry Spending Pattern &amp; Labor Change</i>	Expenditures	Employment	Labor Income
503 Gambling industries (except casino hotels)	\$244,229,731		
5001 Employment compensation		6,246	\$271,717,020

Source: IMPLAN Group, LLC, IMPLAN System (data and software): The Innovation Group.

The results in the following section represent total impacts (direct, indirect and induced) of ongoing casino expenditures and employment. The table below shows the statewide annual ongoing impacts of Iowa casinos as of 2019. The ongoing impacts of casinos are estimated to generate annual direct effects of 6,246 jobs, \$271.7 million in labor income, and \$828.5 million of

value added for the state of Iowa. Based on indirect and induced effects, the total annual impact for the state of Iowa from the ongoing casino operations is approximately 12,473 jobs, \$557.7 million in labor income, and \$1.3 billion in value added.

Table 11: Iowa Casino Operating Impacts – 2019 Dollars

Impact Type	Employment	Labor Income (\$M)	Value Added (\$M)	Output (\$M)
Direct Effect	6,246	\$271.7	\$828.5	\$1,328.8
Indirect Effect	3,980	\$190.5	\$301.9	\$561.7
Induced Effect	2,247	\$95.5	\$179.3	\$320.1
Total	12,473	\$557.7	\$1,309.8	\$2,210.7

Source: IMPLAN Group, LLC, IMPLAN System (data and software); The Innovation Group

### Ongoing Impacts from Donations and Gaming Taxes

The unique structure of the Iowa gaming industry results in a large portion of profits being diverted into payments to state and local governments and not-for-profit organizations and charities. These payments support direct employment in these sectors and generate indirect and induced impacts.

The Innovation Group segmented donations into two sectors within IMPLAN. For donations allocated to not-for-profit and other entities, we utilized sector 522-Grantmaking, Giving, and Social Advocacy Organizations. For city and county donations, we used sector 534-Other Local Government Enterprises.

Table 12: Direct Effect Inputs Iowa Statewide – Casino Donations

Industry Change	Value
522 Grantmaking, giving, and social advocacy organizations	\$55,885,690
534 Other local government enterprises	\$39,591,408

Source: IMPLAN Group, LLC, IMPLAN System (data and software); The Innovation Group

The table below shows the statewide annual ongoing impacts of donations from Iowa casinos as of 2019. The ongoing impacts of these donations are estimated to generate annual direct effects of 319 jobs, \$18.5 million in labor income, and \$56.5 million of value added for the state of Iowa. Based on indirect and induced effects, the total annual impact for the state of Iowa from the ongoing donations is approximately 664 jobs, \$35.4 million in labor income, and \$84.4 million in value added.

Table 13: Iowa Casino Donation Impacts – 2019 Dollars

Impact Type	Employment	Labor Income (\$M)	Value Added (\$M)	Output (\$M)
Direct Effect	319	\$18.5	\$56.5	\$95.5
Indirect Effect	206	\$10.9	\$16.8	\$34.1
Induced Effect	139	\$5.9	\$11.1	\$19.8
Total	664	\$35.4	\$84.4	\$149.5

Source: IMPLAN Group, LLC, IMPLAN System (data and software); The Innovation Group

Iowa casinos generate meaningful tax revenue for the state government in the form of gaming and other taxes paid. Based on reported data for 2019, casinos paid total gaming and other taxes of

\$376.9 million, excluding payroll taxes. The Innovation Group utilized the Institutional Spending Pattern function within IMPLAN to model the impacts generated from these taxes paid.

Table 14: Direct Effect Inputs Iowa Statewide – Gaming and Other Taxes

<i>Institutional Spending Pattern</i>	<i>Expenditures</i>
12001 State/Local govt other services	\$376,946,142

Source: IMPLAN Group, LLC, IMPLAN System (data and software); The Innovation Group

The following table displays the statewide annual ongoing impacts. The ongoing impacts of these taxes paid are estimated to generate annual direct effects of 3,144 jobs, \$200.8 million in labor income, and \$249.6 million of value added for the state of Iowa. Based on indirect and induced effects, the total annual impact for the state of Iowa from the ongoing taxes paid is approximately 4,332 jobs, \$252.8 million in labor income, and \$345.3 million in value added.

Table 15: Iowa Casino Gaming and Other Taxes Paid Impacts – 2019 Dollars

	Employment	Labor Income (\$M)	Value Added (\$M)	Output (\$M)
Direct Effect	3,144	\$200.8	\$249.6	\$292.3
Indirect Effect	193	\$9.8	\$16.3	\$32.8
Induced Effect	994	\$42.3	\$79.4	\$141.7
Total	4,332	\$252.8	\$345.3	\$466.8

Source: IMPLAN Group, LLC, IMPLAN System (data and software); The Innovation Group

## Total Ongoing Impacts

Total ongoing impacts include 17,469 jobs supported, \$846 million in labor income, and \$1.7 billion of value added for the state of Iowa.

Table 16: Total Ongoing Impacts from Operations, Donations and Taxes – 2019 Dollars

	Employment	Labor Income (\$M)	Value Added (\$M)	Output (\$M)
Direct Effect	9,710	\$491.0	\$1,134.6	\$1,716.6
Indirect Effect	4,379	\$211.1	\$334.9	\$628.7
Induced Effect	3,381	\$143.7	\$269.9	\$481.6
Total	17,469	\$845.9	\$1,739.4	\$2,826.9

Source: IMPLAN Group, LLC, IMPLAN System (data and software); The Innovation Group

## One-Time Construction Impacts

For one-time construction impacts, we compiled costs for the 2012-2021 period as reported by casino operators; the 2014 economic impact study assessed construction impacts through 2011. The major events were the conversion to landbased by Isle Bettendorf in 2016 and the construction of the Hard Rock casino in 2014, Rhythm City in 2015-16, and Wild Rose-Jefferson in 2015.

Construction impacts are expressed on a single-year basis. Therefore, the employment figures, for example, represent person-year equivalents; for a construction period of two years, the actual number of workers onsite would be half the person-year equivalent. Recognizing that the



construction costs occurred across a wide time horizon, The Innovation Group converted each casino’s construction budget into 2021 dollars.

Table 17: Direct Effect Inputs Iowa Statewide – Casino Construction

<i>Industry Change</i>	<i>Industry Sales</i>
57 Construction of New Commercial Structures, including farm structures	\$496,569,336

Source: IMPLAN Group, LLC, IMPLAN System (data and software); The Innovation Group

The IMPLAN model estimates that construction of Iowa casinos directly supported 4,266 workers, with labor income equaling \$268.2 million and total added value to the economy of \$291.5 million. These direct impacts drove a further \$204.1 million in added value to the economy and over 2,400 jobs from indirect and induced effects. In total, Iowa is estimated to have benefited from a one-time, single-year equivalent employment impact of 6,689 workers, \$382.0 million in labor income and \$495.6 million in total value added, as shown in the table below.

Table 18: Iowa Casino Construction Impacts – 2021 Dollars

<i>Impact Type</i>	<i>Employment</i>	<i>Labor Income (\$M)</i>	<i>Value Added (\$M)</i>	<i>Output (\$)</i>
Direct Effect	4,266	\$268.2	\$291.5	\$496.6
Indirect Effect	951	\$49.7	\$83.8	\$156.4
Induced Effect	1,471	\$64.1	\$120.3	\$214.7
Total	6,689	\$382.0	\$495.6	\$867.6

Source: IMPLAN Group, LLC, IMPLAN System (data and software); The Innovation Group

## *Social and Community Impact Analysis*

Casino gaming has been in operation in Iowa for nearly three decades, and there are casinos relatively evenly distributed throughout the state. By now few Iowans have very far to drive to get to a casino, and in our analysis of player databases we see penetration into every zip code in Iowa.

Therefore, the distinction between casino counties and non-casino counties in terms of social and community impacts is highly tenuous at this point in the industry’s development in Iowa. However, to maintain consistency with the 2014 study, the analysis compares casino vs. control counties in line with the 2014 socio-economic report in major economic and social categories. The following table shows the casino and control counties utilized and their population changes over the past decade. Iowa has been experiencing population loss in numerous counties although the state total population increased by 4.7%

Table 19. Population Characteristics of Casino and Control Counties

Commercial Casino Counties	2010 Population	2020 Population	Change	PctChg	Designation
Black Hawk	131,090	131,144	54	0.0%	Metropolitan
Clarke	9,286	9,748	462	5.0%	
Clayton	18,129	17,043	-1,086	-6.0%	
Clinton	49,116	46,460	-2,656	-5.4%	Micropolitan
Des Moines	40,325	38,910	-1,415	-3.5%	Micropolitan
Dubuque	93,653	99,266	5,613	6.0%	Metropolitan
Greene	9,336	8,771	-565	-6.1%	
Lyon	11,581	11,934	353	3.0%	
Palo Alto	9,421	8,996	-425	-4.5%	
Polk	430,640	492,401	61,761	14.3%	Metropolitan
Pottawattamie	93,158	93,667	509	0.5%	Metropolitan
Scott	165,224	174,669	9,445	5.7%	Metropolitan
Washington	21,704	22,565	861	4.0%	Metropolitan
Woodbury	102,172	105,941	3,769	3.7%	Metropolitan
Worth	7,598	7,443	-155	-2.0%	Micropolitan
Control Counties					
Cerro Gordo	44,151	43,127	-1,024	-2.3%	Micropolitan
Delaware	17,764	17,488	-276	-1.6%	
Hardin	17,534	16,878	-656	-3.7%	
Johnson	130,882	152,854	21,972	16.8%	Metropolitan
Linn	211,226	230,299	19,073	9.0%	Metropolitan
Muscatine	42,745	43,235	490	1.1%	Micropolitan
Pocahontas	7,310	7,078	-232	-3.2%	
Webster	38,013	36,999	-1,014	-2.7%	Micropolitan
Commercial Casino County Metro Area	1,037,641	1,119,653	82,012	7.9%	
Commercial Casino County Micro Area	97,039	92,813	-4,226	-4.4%	
Commercial Casino County Outlying Area	57,753	56,492	-1,261	-2.2%	
Commercial Casino County Totals	1,192,433	1,268,958	76,525	6.4%	
Control County Metro Area	342,108	383,153	41,045	12.0%	
Control County Micro Area	124,909	123,361	-1,548	-1.2%	
Control County Outlying Area	42,608	41,444	-1,164	-2.7%	
Control County Totals	509,625	547,958	38,333	7.5%	
State Totals	3,046,355	3,190,369	144,014	4.7%	

Source: US Census Bureau

The following table summarizes the results for some of the key socio-economic indicators. The percentage of families receiving financial assistance has declined in all categories, retail sales have increased in all casino counties except Clinton, and personal income has increased in all categories. While there are some differences between casino and control counties in the metro category,

including for crime rates, the data do not present evidence attributing a causal effect to casino operations. Casino counties in the metro category represent a much larger population, 1.12 million versus only 383,153 in the two control metro counties. There are few if any differences in the micro and outlying areas categories.

Table 20. Key Socio-Economic Characteristics of Casino and Control Counties

	Total Class A Offenses per 100,000	Personal Income 2019	<i>P.I.</i> <i>Change</i> <i>over 2012</i>	Change in Retail Sales 2014-19	% of Families Receiving FIP	<i>FIP</i> <i>Change</i> <i>over 2012</i>
<b>Commercial Casino Counties</b>						
Black Hawk	5,358	45,986	7.0%	4.7%	1.04%	-45%
Clarke	4,388	40,721	15.3%	12.5%	0.51%	-63%
Clayton	779	46,342	11.8%	17.5%	0.19%	-72%
Clinton	6,418	44,713	6.2%	-1.6%	0.84%	-58%
Des Moines	7,454	49,282	12.7%	6.3%	1.03%	-49%
Dubuque	5,232	50,903	12.6%	9.9%	0.57%	-62%
Greene	2,063	45,337	4.2%	12.0%	0.75%	-38%
Lyon	2,483	45,810	13.6%	21.0%	0.09%	-81%
Palo Alto	2,722	44,866	6.0%	27.0%	0.26%	-68%
Polk	5,825	54,026	5.7%	20.2%	0.64%	-58%
Pottawattamie	7,849	45,224	8.7%	12.8%	0.83%	-51%
Scott	7,714	55,022	3.8%	6.4%	0.83%	-65%
Washington	3,538	56,619	23.5%	21.3%	0.34%	-62%
Woodbury	7,985	44,370	9.5%	8.1%	0.85%	-39%
Worth	2,096	41,103	3.5%	18.8%	0.32%	-36%
<b>Control Counties</b>						
Cerro Gordo	6,667	50,478	5.6%	2.0%	0.54%	-40%
Delaware	2,571	47,484	15.5%	37.6%	0.38%	-53%
Hardin	2,472	44,712	0.9%	7.0%	0.34%	-77%
Johnson	3,559	54,658	10.8%	11.4%	0.36%	-65%
Linn	5,416	53,530	5.3%	6.4%	0.62%	-49%
Muscatine	4,145	47,911	9.2%	4.2%	0.60%	-65%
Pocahontas	1,606	44,676	15.2%	9.0%	0.40%	-67%
Webster	7,517	45,003	11.3%	3.9%	0.81%	-55%
Commercial Casino County Metro Areas	6,315	51,375	7.3%	13.8%	0.73%	-55%
Commercial Casino County Micro Areas	6,509	46,344	8.8%	3.3%	0.73%	-51%
Commercial Casino County Outlying Areas	2,250	44,906	10.3%	18.8%	0.36%	-61%
All Commercial Casino Counties	6,154	50,714	7.6%	13.2%	0.61%	-56%
Control County Metro Areas	4,646	53,983	7.4%	8.2%	0.49%	-56%
Control County Micro Areas	6,028	47,947	8.4%	3.1%	0.65%	-56%
Control County Outlying Areas	2,372	45,873	9.2%	19.7%	0.37%	-68%
All Control Counties	4,785	52,026	8.1%	7.5%	0.50%	-60%
Statewide	4,462	49,642	9.3%	12.2%	0.54%	-58%

Source: Various, The Innovation Group. FIP = Family Investment Program Benefits

The major negative impact from casino operations involves problem gambling. The *2016 Survey of Problem Gambling Services in the United States* ranks Iowa fourth in per-capita state-funded problem gambling programs, at approximately \$1.00 compared to the national average of \$0.37. In total, Iowa spent over \$3 million on problem gambling services in 2016. These funds supported an array of problem gambling services, including a helpline, research, program evaluation, counselor training, treatment, prevention, and public awareness services. The State should continue all efforts and the necessary funding to minimize social harms from problem gambling.

Based on our analysis, we do not see any material negative changes to social or community impacts since the 2014 report. Crime rates have declined in Iowa, there have been improvements in problem gambling monitoring and declines in persons receiving treatment, unemployment is low throughout the state, and real personal income has risen in casino and non-casino counties alike.

## *Conclusion*

Iowa's unique enabling legislation requires gaming licenses to be either held or sponsored by nonprofit organizations, enhancing positive community benefits.

For example, the Iowa West Foundation in 2019 celebrated \$500 million in funding to nonprofit organizations and governmental entities in Council Bluffs and rural communities in southwest Iowa. The Foundation was established in 1994 as a 501(c)3 charity funded by the Iowa West Racing Association (IWRA), which is the license holder for the Horseshoe Casino and the license sponsor for Ameristar and Harrah's. The Foundation has invested \$237 million dollars in partnership with the City of Council Bluffs for infrastructure projects and amenities, \$101 million for educational opportunities, \$73 million with the human service community through its Healthy Families portfolio, and \$165 million dollars in "placemaking."

In Central Iowa, the unique non-profit ownership structure of Prairie Meadows has led to a direct community impact of \$2 billion since 1996, supporting vital arts, culture, healthcare, education and infrastructure initiatives across central Iowa. Over the years, these funds have contributed to the Highway 5 expansion, Greater Des Moines Urban Beautification Project, and Wells Fargo Arena.

In terms of economic impact, 2019 is likely to be the high-water mark for Iowa. The pandemic forced the closure of Iowa casinos for two months in 2020, and although gaming revenue in 2021 has recovered to levels above 2019, employment has lagged as fewer table games are in operation in many casinos and amenities such as buffets and entertainment remain closed or with reduced operating hours. This lag is by and large involuntary, as operators have unanimously noted the tight labor markets, low unemployment, and difficulty in attracting workers.

Looking forward, the implementation of casino gaming in Nebraska, and two new casinos in Illinois and Wisconsin, are projected to cause a decline in Iowa gaming revenue and the resulting economic and fiscal benefits to the state and local communities. Furthermore, the phasing out of

the tax on free play credits, while recommended as an industry best practice, will nevertheless further erode the fiscal impact from the gaming industry.

In the last year, industry change has revolved around the continued expansion of sports betting and online gaming, new technologies supporting cashless play, and other lasting trends that emerged and accelerated during the pandemic. However, strategic challenges prominent going into the pandemic remain. These include the diversification of real estate and amenities, the reshuffling of corporate structures, attending to the preferences of millennials, anticipating the future of slot play, the popularity of electronic table games, and the relevance of esports, and finding the next great thing in entertainment.

Amenity development and diversification can enhance a casino's market share as well as a local community's tax base and employment opportunities. The successful PZAZZ/Fun City development in Burlington is an excellent example of a diverse entertainment development in line with the scale of market demand, and amenity investment at Elite Casino properties demonstrates the impact to market share and gaming revenue from diversification. Redevelopment of the greyhound track in Dubuque offers future potential for the Iowa gaming market to broaden its appeal to gaming consumers.

Distributed electronic gaming tends to enhance a state's fiscal benefits on a net basis, but experience in Illinois has shown that it can result in upwards of a 20% impact on casino slot revenue. Furthermore, the employment impact is negligible from VGT/VLT development.

Despite what would seem to make intuitive sense—that online gaming would negatively affect bricks-and-mortar casino revenue—the evidence in New Jersey and other states suggests otherwise. Onsite casino revenue has continued to grow in New Jersey and Pennsylvania following implementation of online slot and table games. The Innovation Group predicted this outcome based on surveys we conducted nearly a decade ago. In-state employment tends to be minimal, however, compared to staffing bricks-and-mortar casinos.

This experience in New Jersey and Pennsylvania would tend to speak to the endurance of bricks-and-mortar casinos. Further, consumer appetite for in-person gaming has been affirmed by recent record-setting trends across the country.

While eSports is a relatively untested product in the casino setting, it is a growing and youth-oriented industry. Prior to the pandemic, the global esports industry had been projected to double by 2023 from 2019's value of US\$1.1 billion. Even as a non-wagering amenity, an esports arena might make market sense for at least one casino in Iowa to broaden the demographic reach of the industry.

Fixed-odds-betting on horse racing has proven successful in Australia and would help integrate horse wagering into Iowa's sports betting platforms. Some racing analysts express concern, however, about its impact on pari-mutuel pools and resulting implications on the dedicated handicapper.

The pace of adaptation and change will still be influenced by regulatory activity. While gaming laws are not expected to retract, new forms of gaming like full online wagering, the addition of distributed systems, or the potential relaxation of certain regulations within Iowa or in competing states, may all contribute to the future environment. While modeling overall trends depends on an endless number of potential variables, strategic planning initiatives can assist the State in shaping and adapting to gaming's future.



Executive Summary

# *Socioeconomic Study and Market Analysis: Casino Gaming in Iowa*

Prepared for the Iowa Racing and Gaming Commission

December 16, 2021

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See slides 40-43 for NE Gaming projections  
See slides 47-48 for predictions about sports wagering



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## INTRODUCTION



## About this Executive Summary

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- This document is only the executive summary of the full narrative report *Socioeconomic Study and Market Analysis: Casino Gaming in Iowa*, prepared for the Iowa Racing and Gaming Commission.
- Readers are encouraged to read the full report for detail, insight and information not available this executive summary.



## Scope of Study

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- State of Iowa requires a socioeconomic study on the impact of gambling on Iowans every eight years
  - Spectrum and Strategic Economics Group also completed the 2013-2014 study
- The study addresses 73 questions covering 11 subject areas:
  1. Local economic effect on the community as a whole from gambling
  2. Local economic effect of the casino on the business community
  3. Casino effect on the local job market
  4. Effect on the community from problem gambling and treating those individuals who are problem gamblers
  5. Health-related issues for individuals who live in a community in which a casino is located
  6. Effect on family life due to the existence of a nearby casino
  7. Effect of casinos on household finances
  8. Current state of the Iowa gaming market
  9. Current state of the gaming markets in contiguous states to Iowa
  10. Future of gambling in the State of Iowa
  11. Impact of sports wagering on Iowa casinos





# Methodology

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- Study methodology
  - Data collection
    - Each of the 19 casinos also provided proprietary data on a confidential basis to help our modeling
  - Interviewed 34 people
  - Survey of city managers/officials
  - Financial modeling
  - Spectrum’s collective decades of studying the social and economic impacts of gaming



# Understanding Context of Gaming Impacts

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- Certain impacts are result of changes in general economic conditions, not effect of particular nature of casino industry.
- Authorization of a casino can have profound economic effect by adding significant employment, disposable income to local economy
- If businesses succeed or fail in expanding economy, are such successes/failures related to economic activity, or particular nature of gaming?
  - Examples: bankruptcies, crime



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# ECONOMIC IMPACTS



## Economic Impacts of Casinos on Host Communities

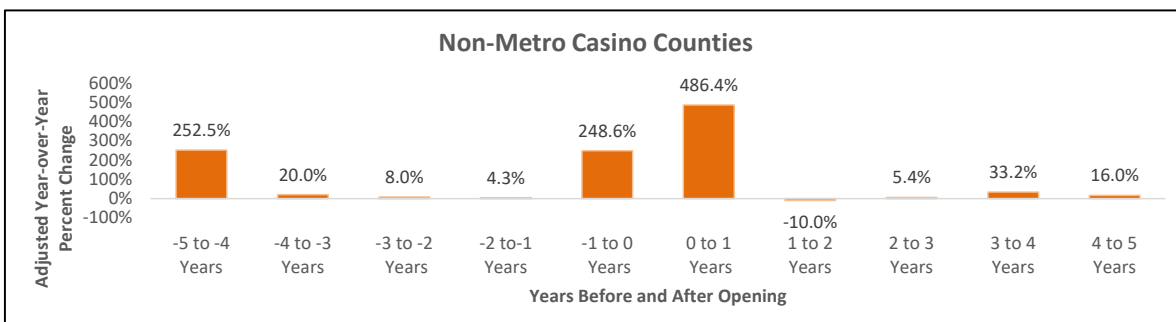
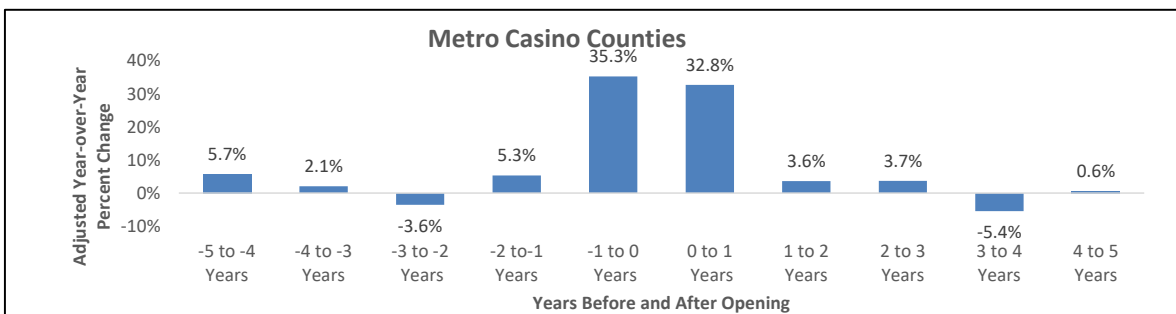
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- For this part of the analysis, comparisons are made for each measure of economic activity by year – from five years prior to each casino’s opening for business to five years after. Employment changes provide the most revealing of the comparisons.
- Employment changes are presented for five economic sectors
  - Lodging and entertainment
  - Bars and restaurants
  - Retail
  - Construction
  - Local government
- The comparisons are made in terms of percentage changes net of statewide percentage changes

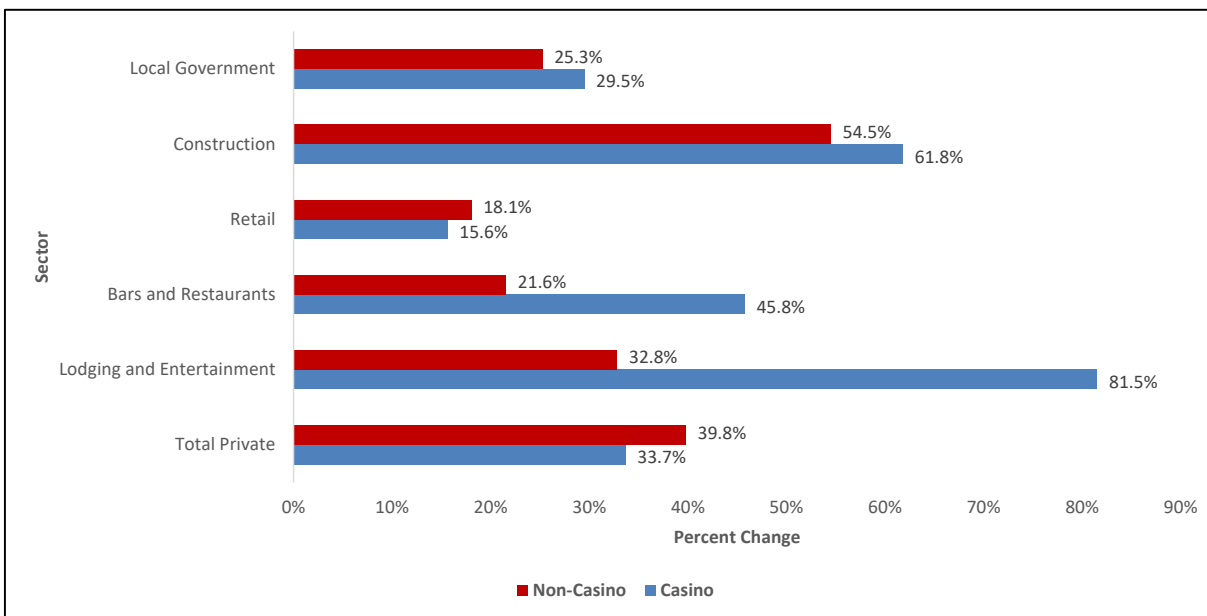
# Summary of Economic Impacts for Host Communities

- The opening of casinos had little impact on population growth.
- Employment in lodging and entertainment sectors showed large percentage increases both the year before and the year after casino openings.
- Bar and restaurant and retail sectors experienced some increase in employment around the time casinos opened for business.
- Construction employment tended to increase two years before casinos opened for business.
- The opening of casinos had only a small impact on the growth of personal income.
- Commercial property values grew at a faster rate in casino counties than statewide from 1990-2010. Residential values grew at a slightly slower rate in casino counties than in non-casino counties.

# Changes in Lodging and Entertainment Employment



# Summary of Long-Term Employment Growth by Sector, 1990-2019

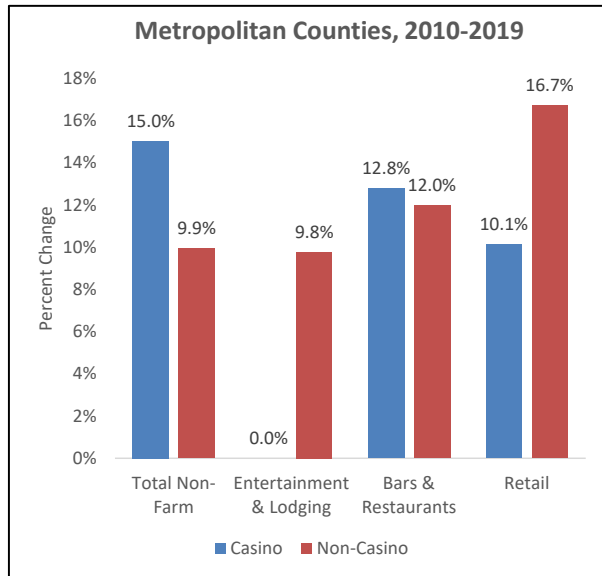
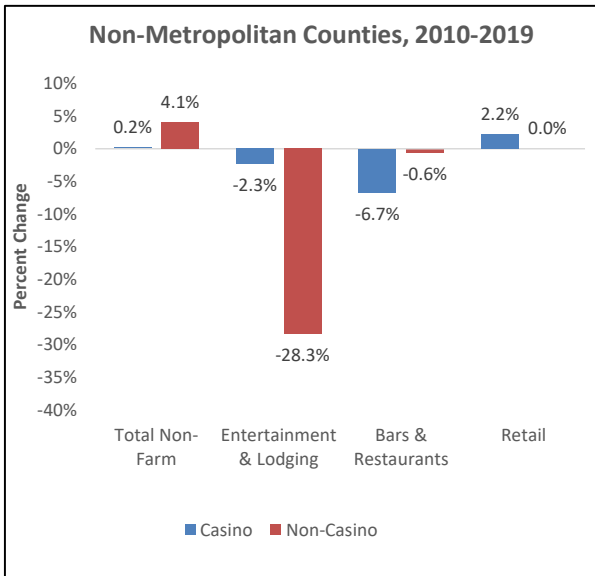


Source: US Census – County Business Patterns, US Bureau of Economic Analysis, Strategic Economics Group

# Comparisons between Casino Counties and Non-Casino Counties

- These comparisons focus primarily on the period from 2010-2019. These comparisons look at the persistence of impacts versus short-term impacts around the times that casinos opened for business.
- The non-metropolitan casino counties experienced a 3.3% decline in population, while the non-metropolitan non-casino counties experienced a 3.8% decline in population.
- The metropolitan casino counties experienced a 7.2% increase in population, while the metropolitan non-casino counties experienced an 11.2% increase in population.

# Comparisons between Casino and Non-Casino Counties: Employment Changes



Source: US Census – County Business Patterns, Strategic Economics Group

# Comparisons between Casino and Non-Casino Counties (cont.)

- Lodging and entertainment employment declined in non-metropolitan counties with and without casinos, but in counties without casinos the decline was much larger, -28.3% vs. -2.3%.
- In metropolitan counties, those with casinos experienced no increase in lodging and entertainment employment, while in the non-casino counties employment in these sectors increased by 9.8% over the past decade.
- In metropolitan counties, retail employment grew by a somewhat greater percentage in non-casino counties than in casino counties, 16.7% vs. 10.1%.
- Bar and restaurant employment grew somewhat more in metropolitan casino counties than in non-casino counties – 12.8% vs. 12.0%.



## Comparisons between Casino and Non-Casino Counties (cont.)

- Bar and restaurant sales in non-metropolitan casino counties increased by 20.8%, while in non-metropolitan counties without casinos the increase equaled 27.6%.
- In metropolitan counties, bar and restaurant sales increased by 43.1% in those with casinos vs. 37.7% in those without casinos.
- In non-metropolitan counties, residential property values increased by about the equal amount in those with and without casinos. In metropolitan counties, residential property values increased at a slightly higher rate in those without casinos (38.4%) than those with casinos (34.6%)
- Commercial property values increased by substantially more in counties without casinos in both non-metropolitan and metropolitan counties.

## Numbers and Shares of Full-Time and Part-Time Casino Employees

Employment Category	Metro Casinos		Non-Metro Casinos		All Casinos	
	Full-Time	Part-Time	Full-Time	Part-Time	Full-Time	Part-Time
Total	4,465	1,785	2,565	849	7,030	2,634
Gaming	1,509	527	868	136	2,377	663
Bar and Restaurant	937	723	516	409	1,453	1,132
Hospitality	414	117	275	110	689	227
Buildings, Grounds	312	35	187	17	499	52
Administrative	413	11	159	7	572	18
Security	370	185	247	27	617	212
Other	510	187	313	143	823	330

Employment Category	Metro Casinos		Non-Metro Casinos		All Casinos	
	Full-Time	Part-Time	Full-Time	Part-Time	Full-Time	Part-Time
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Gaming	33.8%	29.5%	33.8%	16.0%	33.8%	25.2%
Bar and Restaurant	21.0%	40.5%	20.1%	48.2%	20.7%	43.0%
Hospitality	9.3%	6.6%	10.7%	13.0%	9.8%	8.6%
Buildings, Grounds	7.0%	2.0%	7.3%	2.0%	7.1%	2.0%
Administrative	9.2%	0.6%	6.2%	0.8%	8.1%	0.7%
Security	8.3%	10.4%	9.6%	3.2%	8.8%	8.0%
Other	11.4%	10.5%	12.2%	16.8%	11.7%	12.5%

Source: Casino Survey, Strategic Economics Group

# Casino Employees' State of Residence and Commute to Work Distances

At December 2019

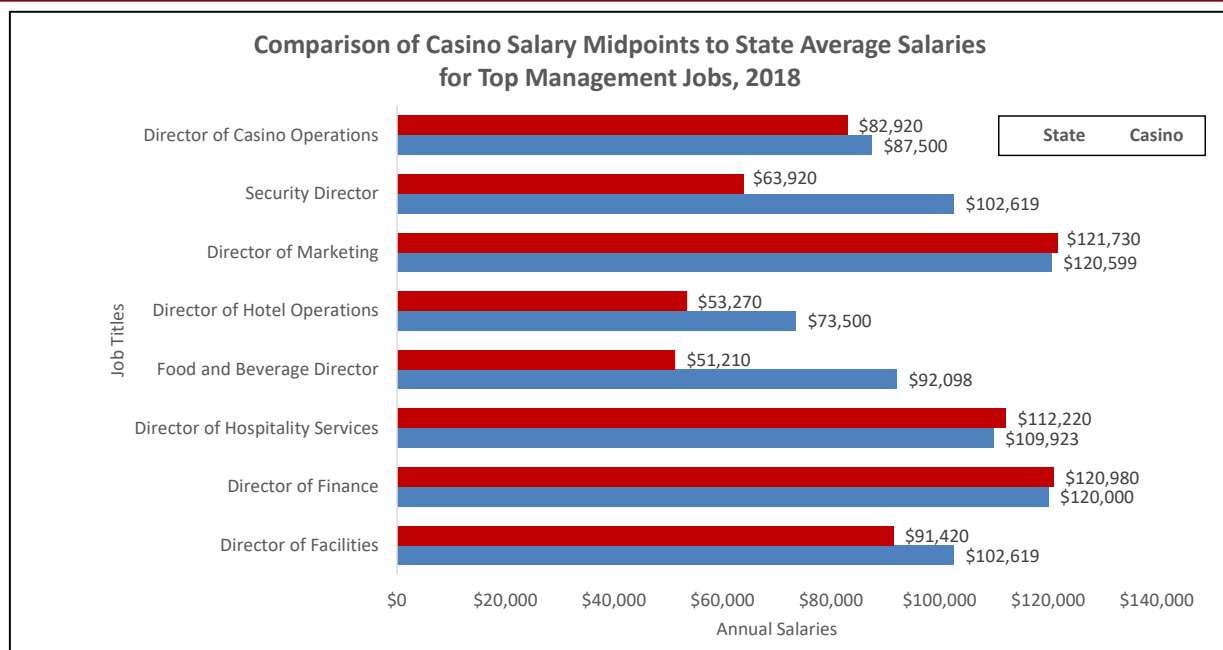
State	Number of Employees	Share of Total	Cumulative Percent
Iowa	5,772	75.0%	75.0%
S. Dakota	746	9.7%	84.7%
Illinois	476	6.2%	90.9%
Nebraska	470	6.1%	97.0%
Wisconsin	101	1.3%	98.4%
Minnesota	48	0.6%	99.0%
Other	78	1.0%	100.0%
<b>Total</b>	<b>7,691</b>	<b>100.0%</b>	

Source: 2021 Casino Survey, Strategic Economics Group

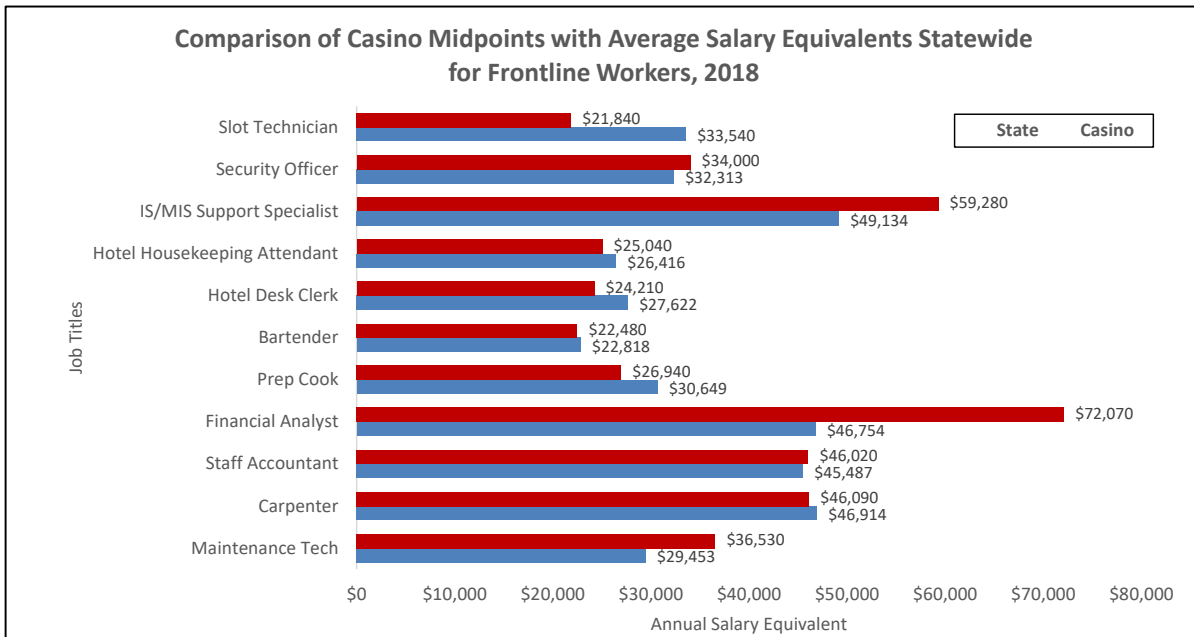
Commuting Distance	Non-Metro Casino	Metro Casino
Less than 5 miles	45.6%	47.2%
5 to 9.99 miles	0.0%	5.8%
10 to 19.99 miles	20.3%	31.7%
20 to 29.99 miles	11.5%	6.1%
30 to 39.99 miles	11.5%	5.1%
40 to 49.99 miles	4.4%	0.8%
50 to 74.99 miles	1.6%	1.5%
75 to 99.99 miles	0.5%	1.0%
100 miles and over	4.4%	0.8%
<b>Average Commute (miles)</b>	<b>18.56</b>	<b>12.36</b>

Source: 2021 Casino Survey, Strategic Economics Group

# Management Pay Comparisons



# Comparison of Front-Line Worker Pay: State vs. Casino



# SOCIAL IMPACTS

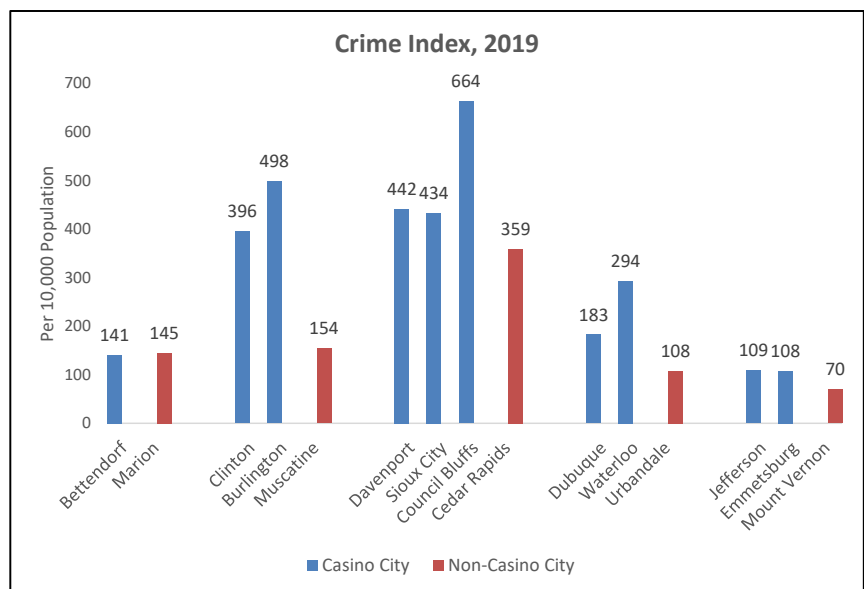


# Social Impacts of Casinos on Host Communities

- This section compares the social impacts in casino communities vs. non-casino communities
- About studying social impacts
  - State did not seek to determine whether the presence of a casino was responsible for negative social impacts
    - Study sought to determine whether communities with casinos experienced greater impacts in a variety of areas such as crime, bankruptcies, and divorces
      - For the most part, Spectrum found that they did
      - Caution: correlation does not equal causation
  - Economic impacts are easier to measure than social impacts

# Crime Rate, Casino Cities vs. Non-Casino Cities

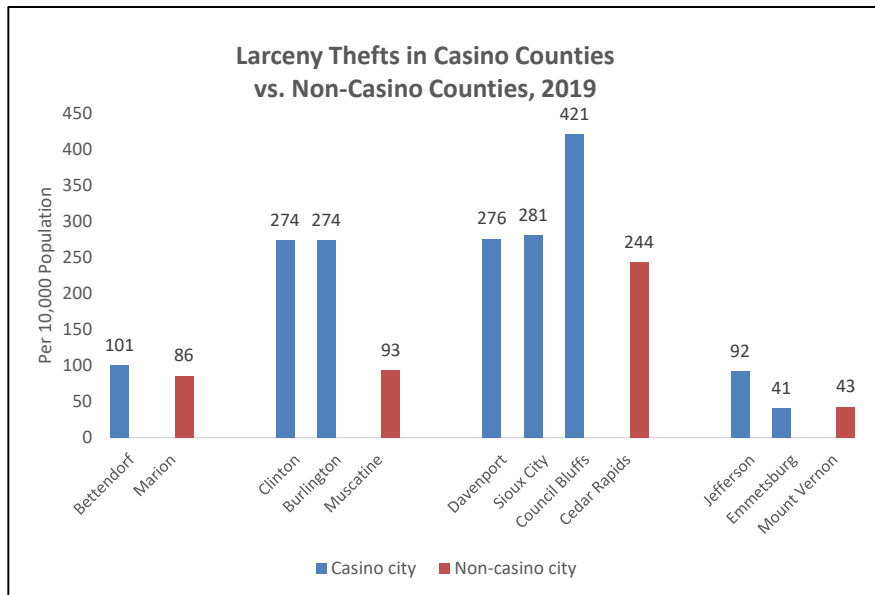
- Casino communities had, for the most part, higher crime rates than similar communities where casinos were not located.
- The crime index consists of four types of violent crime – murder, rape, aggravated assault and robbery – and four types of property crime – burglary, larceny-theft, motor vehicle theft and arson.



Source: FBI Uniform Crime Reports

# Larceny Thefts, Casino Counties vs. Non-Casino Counties

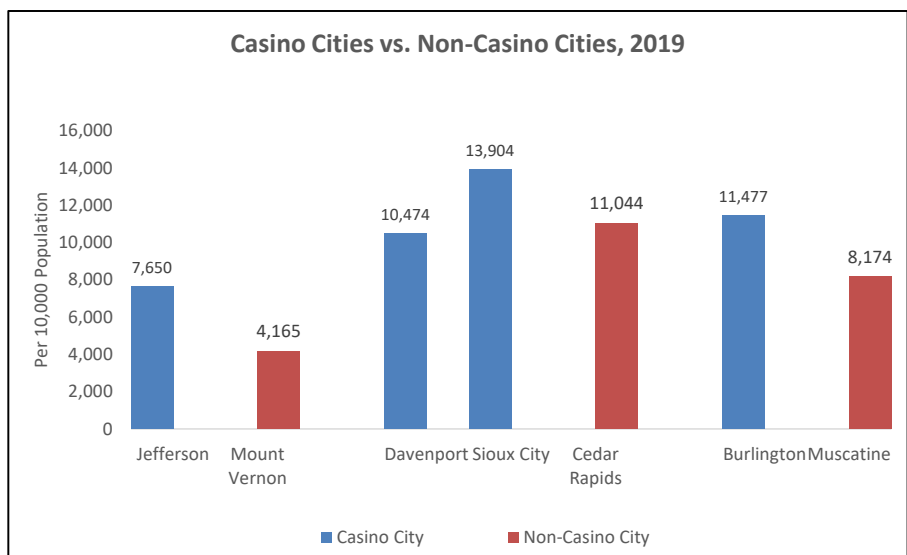
- Larceny thefts were more prevalent in casino communities.
- Trespassing incidents were also more likely to occur at casinos. (Casinos are required to evict self-excluded gamblers. They are often arrested for trespassing.)



Source: FBI Uniform Crime Reports

# Emergency Calls, Casino Cities vs. Non-Casino Cities

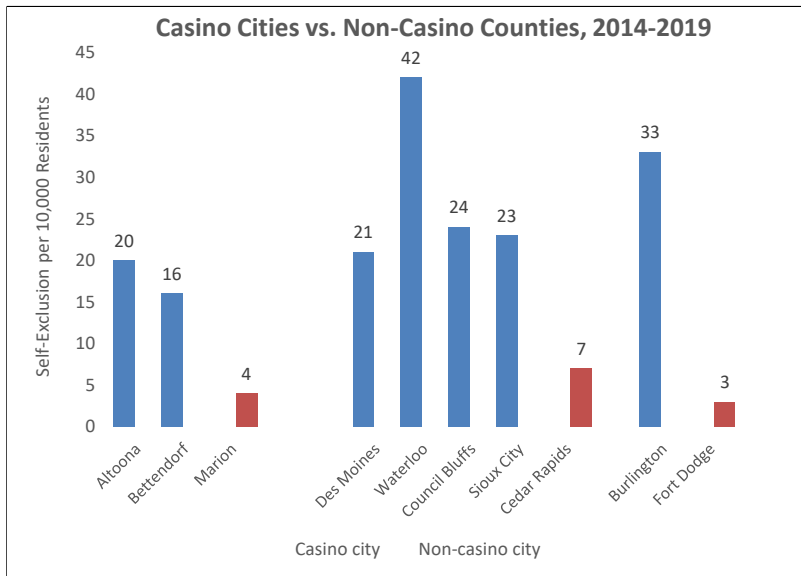
- Calls for emergency service were, for the most part, considerably higher in casino cities than in non-casino cities.
- Many of the 911 calls involved non-residents.
- Our survey was limited by the number of city officials who agreed to provide data.



Source: Local police departments

# Self-Exclusion Rates, Casino Cities vs. Non-Casino Cities

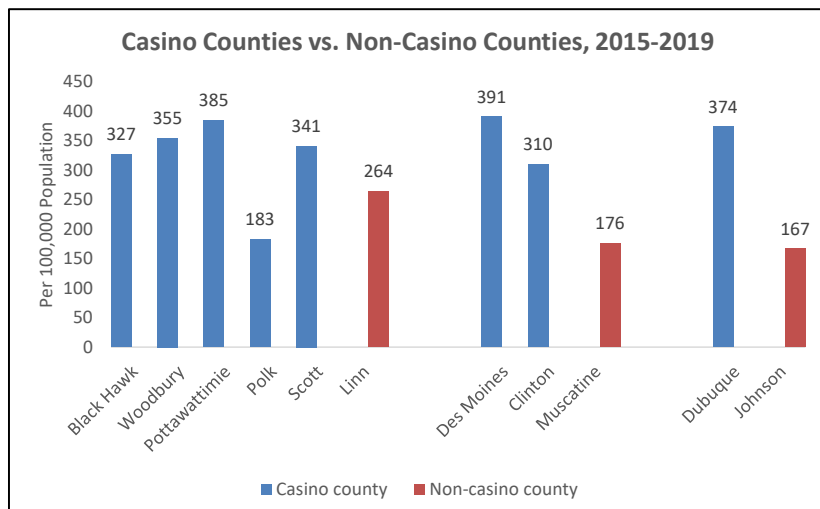
- Gamblers who self-excluded themselves from Iowa casinos were mostly from cities that had casinos.
- Iowa law allows a gambler to self-exclude for either life or five years.
- Nearly one-third of self-excluders do not live in Iowa.
- The city with highest number of self-excluders was Omaha, NE.



Source: Iowa Racing and Gaming Commission

# Contacts with Iowa Problem Gambling Services, Casino Counties vs. Non-Casino Counties

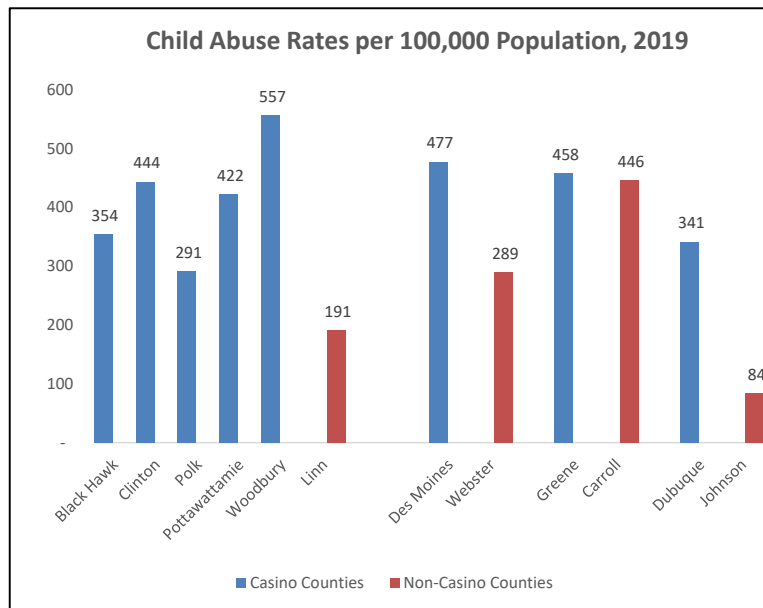
- The vast majority of Iowans who sought help from Iowa Problem Gambling Services resided in counties where casinos were located.



Source: Iowa Problem Gambling Services

# Child Abuse, Casino Counties vs. Non-Casino Counties

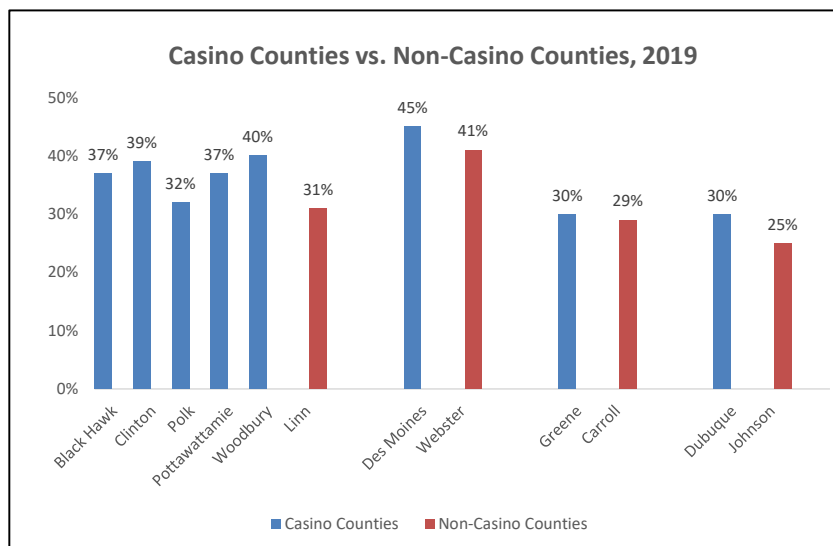
- Under Iowa law, a person is guilty of child abuse if a child is subjected to physical or sexual abuse, denied critical care or allowed access to obscene material.
- Casino counties had higher rates than did non-casino comparison counties.



Source: Iowa Department of Human Resources

# Percentage of Single-Parent Families, Casino Counties vs. Non-Casino Counties

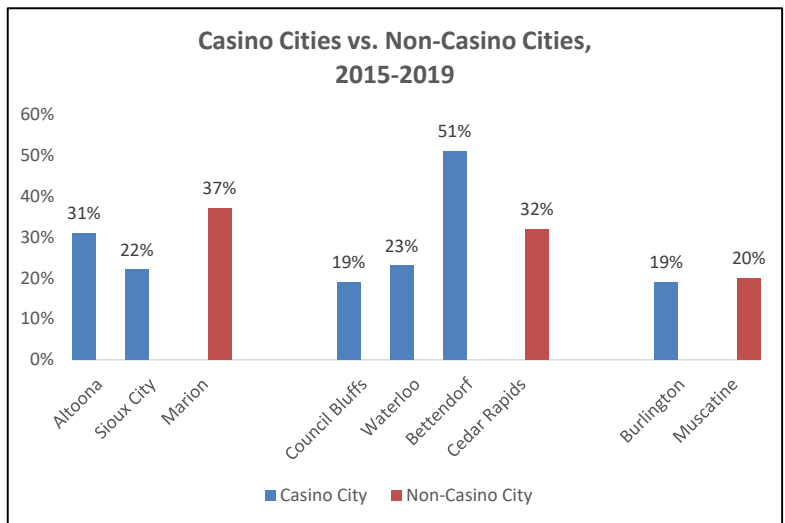
- Casino counties had a much higher percentage of single-parent families than did the counties without casinos.
- Children in single-parent families typically do not have the same resources available to children in two-parent families. They are more likely to drop out of school and experience divorce in adulthood.



Source: Federal Reserve Bank of St. Louis

# Percent of College Graduates, Casino Cities vs. Non-Casino Cities

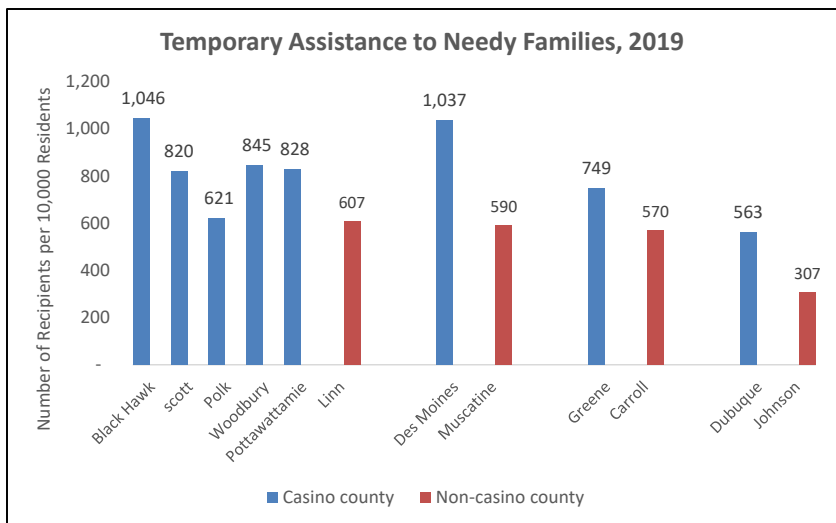
- Education levels in counties without casinos were generally higher than comparable casino counties. But Bettendorf, a casino county, had the highest percentage of college graduates of any county reviewed.



Source: US Census

# Public Assistance, Casino Counties vs. Non-Casino Counties

- Iowa's Temporary Assistance For Needy Families program provides cash assistance to families so that children may be cared for in their own homes or in the homes of relatives.
- Casino counties had higher rates than did non-casino counties.

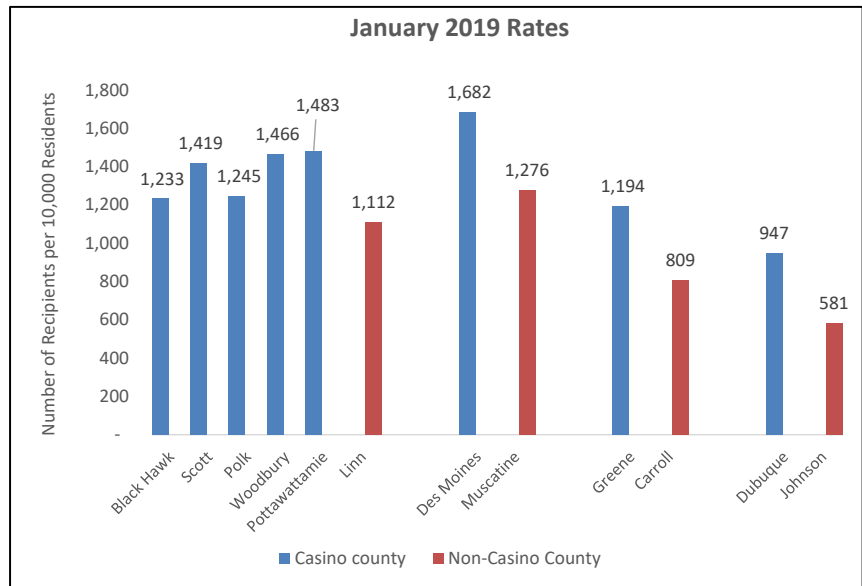


Source: Iowa Department of Human Services



# Food Assistance, Casino Counties vs. Non-Casino Counties

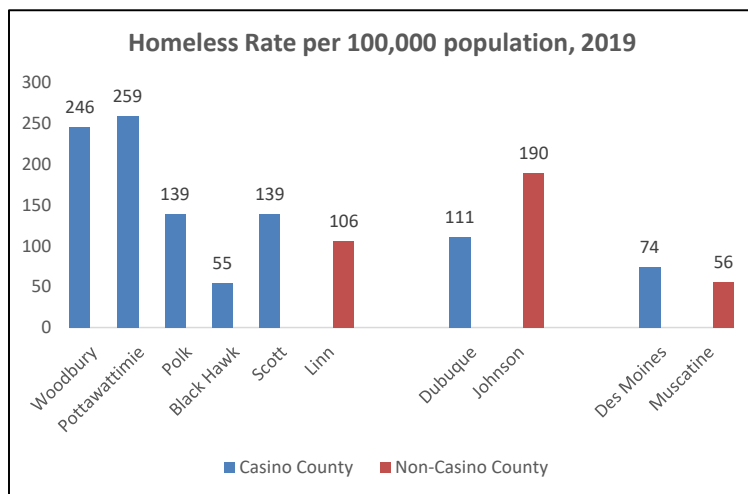
- Iowa provides food assistance to those in need.
- As with the public assistance program, casino counties had significantly higher rates than did their comparison counties.
- The program provides electronic cards that can be used to purchase groceries.



Source: Iowa Department of Human Services

# Extent of Homelessness, Casino Counties vs. Non-Casino Counties

- Iowa estimates its homeless population by doing an annual census to identify homeless people.
- Casino counties have much higher rates of homeless people than do their non-casino comparison counties.
- Many of the casinos are in urban areas where shelters are located.



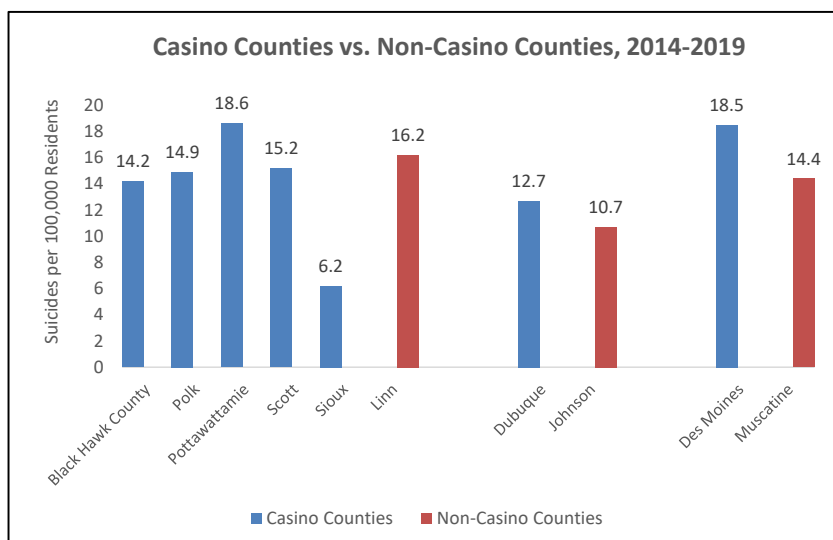
Source: Institute for Community Alliances

## Life Expectancy, Casino Counties vs. Non-Casino Counties

- For 2019:
  - Linn County, the only metropolitan county in Iowa that does not have a casino, had a life expectancy of 78.4 years for males, and 82.3 years for females.
  - Those numbers were higher when compared with the casino metropolitan counties of Woodbury, Pottawattamie, Polk, Black Hawk, Dubuque and Scott.
  - The non-metropolitan county of Des Moines had a slightly higher life expectancy than its comparison county of Muscatine for females but a lower life expectancy for males.

## Suicide Rates, Casino Counties vs. Non-Casino Counties

- Rates for Linn County, a metropolitan county without a casino, were higher than four of five of its casino comparison counties.
- The non-metropolitan casino counties of Des Moines and Dubuque had higher rates than their comparison counties without casinos, Johnson and Muscatine.



Source: Iowa Department of Public Health

# GAMING MARKET ANALYSIS

## Current State of Iowa Gaming Market

- Iowa casino industry is healthy
  - 19 commercial casinos
  - 4 compacted tribal casinos
- Recent Iowa commercial casino performance:

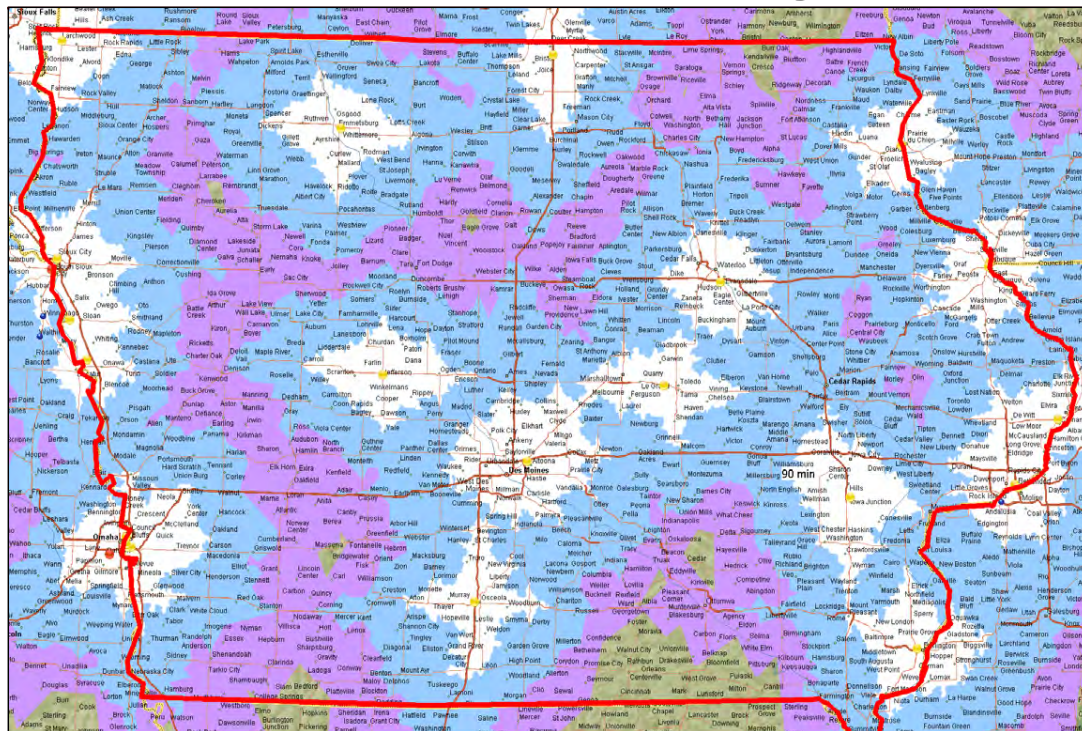
Calendar Year	Slot Win (\$M)	Win per Slot per Day	Table Win (\$M)	Win per Table per Day	Total Win (\$M)	Win per Square Foot per Casino per Day
2017	\$1,310.4	\$215.7	\$142.7	\$899.6	\$1,453.2	\$5.64
2018	\$1,310.5	\$218.9	\$147.4	\$908.3	\$1,457.9	\$5.71
2019	\$1,305.4	\$220.9	\$153.6	\$926.4	\$1,459.0	\$5.77
2020 (290 days open)	\$1,015.4	\$223.3	\$107.0	\$870.0	\$1,122.5	\$5.66
9 Mos. '21 Annualized	\$1,580.6	\$288.3	\$161.1	\$1,082.7	\$1,741.7	\$6.98

Source: Spectrumetrix, Iowa Racing and Gaming Commission

- Commercial casino industry adjusted gross receipts (“AGR”) on pace for a record year in calendar 2021



# Current State of Iowa Gaming Market



Market is well served – no underserved areas

Most of the state is within a 60-minute drive of a casino

# Gaming Industry in Nearby States

- Neighboring states are doing well, too

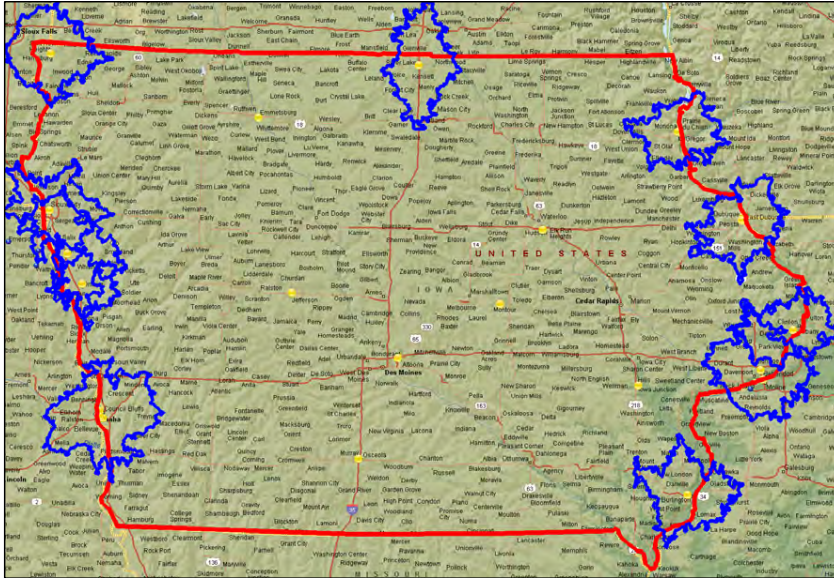
Total Win CY (M)	IL Casino	IL VGT	IN	IA	MO
2017	\$1,406.5	\$1,302.8	\$2,220.9	\$1,453.2	\$1,727.1
2018	\$1,373.5	\$1,500.0	\$2,222.6	\$1,457.9	\$1,744.2
2019	\$1,354.2	\$1,676.7	\$2,188.1	\$1,459.0	\$1,719.4
2020	\$494.0	\$1,134.4	\$1,568.2	\$1,122.5	\$1,249.7
9 Mo. 2021 Annualized	\$1,234.9	\$2,444.8	\$2,387.2	\$1,741.7	\$1,883.9
Change 2017-2019	-\$52.3	\$373.9	-\$32.8	\$5.8	-\$7.7
CAGR 2017 to 2021 Annualized	-3.20%	17.0%	1.8%	4.6%	2.2%

Source: Spectrumetrix, Spectrum Gaming Group

- Iowa growth rate outperforming other states
- Illinois casino industry struggling due to VGTS
  - Illinois gaming tax revenue up, but casino employment down

# Iowa is a Net Importer of Casino Play

Iowa Border Casinos and 30-Minute Drive Times



- 14 commercial & 3 tribal casinos on borders
  - Originally riverboats
  - Had to be on river
  - Rivers are borders
- Capture play from
  - Illinois
  - Minnesota
  - Nebraska
  - South Dakota
  - Wisconsin

# Nebraska Seeking to Repatriate Casino Play

- Nebraska has minimal gaming now
- Nebraska voters in November 2020 overwhelmingly approved constitutional amendments to allow casinos at the state's six licensed horse-racing tracks
  - New Nebraska act will place casinos at Iowa border
    - Omaha – Horsemen's Park
    - Lincoln – Lincoln racecourse
    - South Sioux City – Atokad Park Racetrack
  - Casinos proposed for nearby racetracks
    - Bellevue (near Omaha)
    - Columbus Agricultural Park
  - In Iowa, the casinos in Council Bluffs and Sioux City will feel the impact



# What Does the Future Look Like?

- Nebraska casinos threaten Sioux City and Council Bluffs
  - At maturity (2025), Council Bluffs may lose 45% of market to new casinos
    - 80% of gaming revenue comes from Nebraska

Impact to Council Bluffs Market	Visits	AGR
Current (FY 2021)	3,666,857	\$404,281,270
Est. loss to Nebraska	(1,506,000)	-\$183,900,000
Council Bluffs three years after Nebraska casinos open	2,160,857	\$220,381,270
% Retained	58.9%	54.5%

Source: Spectrum Gaming Group

- Sioux City less at risk, but proximity of competition is a challenge
  - Hard Rock could retain nearly 60% of the market after a new casino is added

Impact to Sioux City Market	Visits	AGR
Current (FY 2021)	1,425,562	\$87,071,790
Est. loss to Nebraska	(601,000)	-\$35,520,000
Hard Rock three years after Nebraska casinos open	824,562	\$51,551,790
% Retained	57.8%	59.2%

Source: Spectrum Gaming Group

- Loyalty programs and redeeming points nationwide is key



# Iowa Adjusted Gross Receipts Forecast: Nebraska Competition will Cause Decline

- As shown, Nebraska casinos near Omaha and South Sioux City will cannibalize market
- Slow growth in Iowa's mature markets
- Revenue growth in mature markets driven by population and income growth

Estimated Iowa AGR 3-Year Forecast with Nebraska Casinos Open in 2023

Year	Admissions	Change from 2021	AGR	Change from 2021	Employment	Change from 2021
FY 2021	16,394,655		\$1,575,410,919		8,009	
2022	16,503,952	0.7%	\$1,587,050,860	0.7%	8,090	1.0%
2023	15,260,000	-6.9%	\$1,537,420,000	-2.4%	7,934	-0.9%
2024	14,580,000	-4.5%	\$1,516,540,000	-3.7%	7,575	-5.4%

Source: IRGC, Spectrum Gaming Group

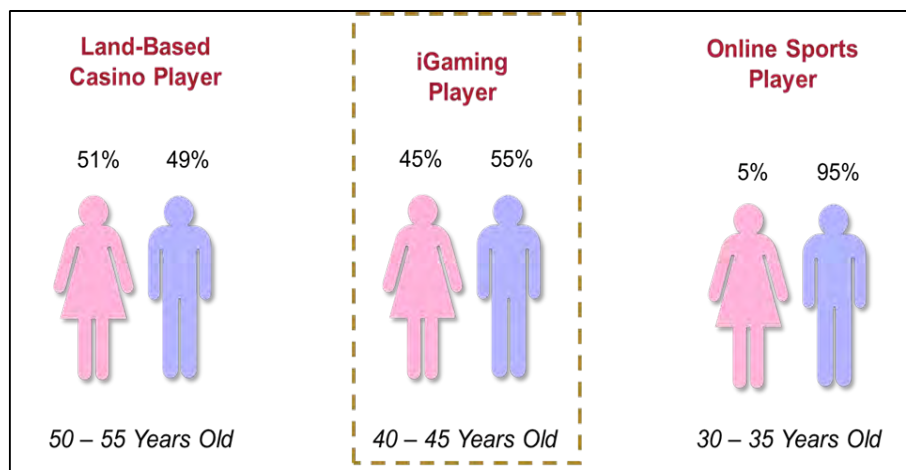


# Elements of Success for Iowa Casino Industry

- Legislature and IRGC allowed industry to modernize and adapt:
  - Removed betting limits
  - Permitted land-based gaming
  - Authorized sports wagering
  - Removed some promotional play from Adjusted Gross Receipts calculation
  - Maintained funding for the Gambling Treatment Fund
  - Eliminated cruising requirement
  - Installed table games at racetrack casinos
  - Permitted credit at casinos
- Maintained stable tax rates
- Sought development and employment not merely taxes
- Did not expand gaming beyond casinos and racinos
- Reasoned additions to industry allowing properties to thrive
- Encouraged investment in non-gaming amenities to broaden market appeal

# Database Analysis Show Igaming, Sports Betting have Different Demographics than Casino Gaming

- The infographic below illustrates the differing demographics among retail casino players, igaming players and online sports bettors. The differences emphasize that each form of gaming appears to cater to a distinct demographic.

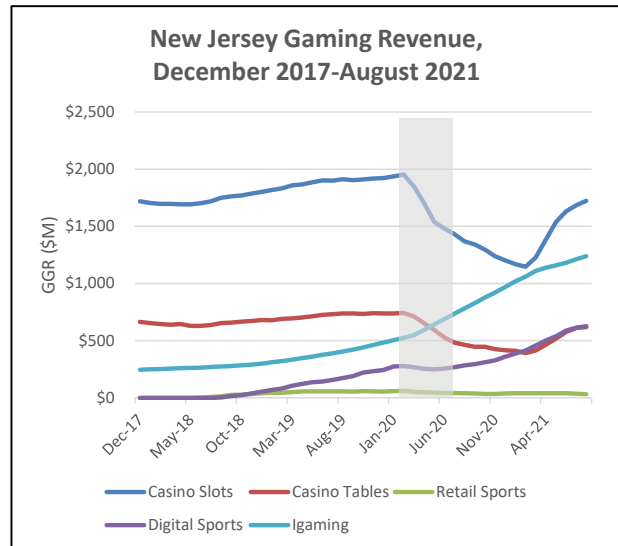


Source: Golden Nugget Online Gaming

# Total Gaming Insight from New Jersey

New Jersey, the most tenured state for igaming and sports betting, experienced casino revenue growth during the ramp-up of both igaming and sports betting

- Prior to commencement of sports betting, from December 2017 through May 2018, rolling last-12-months (“LTM”) slot revenue averaged about \$1.7 billion, and table games revenue averaged \$650 million
- After retail and digital sports betting commenced, from December 2018 through May 2019, rolling LTM slot machine revenue averaged \$1.85 billion and table game revenue averaged \$700 million, increases of 8.8% and 7.6%



Source: New Jersey Division of Gaming Enforcement, Spectrum Gaming Group. Gray column shows period casinos were closed during the pandemic.

# Total Gaming Insight from Pennsylvania

Although there was a modest uptick in casino revenue after sports betting was introduced in Pennsylvania, it was not as pronounced as New Jersey

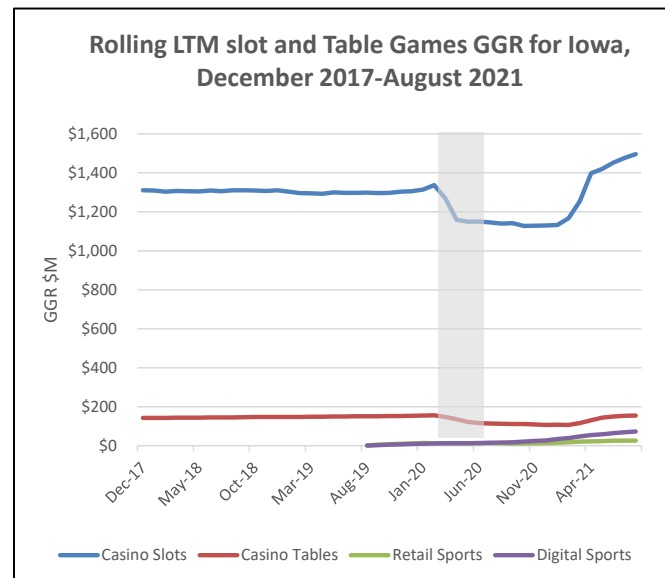
- Pennsylvania commenced sports betting in November 2019 and digital in July 2019
- Rolling LTM revenue averaged \$2.35 billion from slots and \$840 million from tables from December 2017 through October 2019
- After retail sports betting was launched, we observed a marginal (+1%) increase in slot play to \$2.37 billion; table game play was relatively flat
  - However, after digital was introduced, table games revenue increased 2% to average \$845 million
- Igaming commenced in July 2019, which could have tempered growth in casino activity as gamblers tried the online product



Source: Pennsylvania Gaming Control Board, Spectrum Gaming Group. Gray column shows period casinos were closed during the pandemic.

## Total Gaming in Iowa: Experience and Key Takeaways

- In Iowa, table games revenue experienced a much more pronounced increase than slot revenue after sports betting was introduced (+4.7% vs +0.3%).
- Across all states observed (NJ, PA, RI, MS, IA), sports betting resulted in a positive increase in casino revenue, more pronounced for table games than slots.
- This comports with demographic studies Spectrum has reviewed that suggest table games players skew younger and have greater overlap with sports wagering demographic.
- Additionally, Spectrum believes that a compelling retail sportsbook will drive incremental traffic at the casino and can have a positive spillover effect on casino, food and beverage, and other revenue.



Source: State Gaming Commission, Spectrum Gaming Group.  
Gray column shows period casinos were closed during the pandemic.

## Evolution of Sports Wagering Will Bring Tech Advancements and New Products

- Spectrum believes sports betting will become increasingly “gamblified” through the increase of in-play wagering, skill-based wagering and esports wagering.
  - As the appetite for sports wagering grows, bookmakers will aim to continuously diversify product offering and betting opportunities to cater to different demographics and induce greater wagering volumes.
  - US sports are well suited for in-play wagering with all the stops/delays during a sporting event.
  - Esports betting will cater to an entirely different demographic than sports betting and is projected to grow 83% by 2024 (\$880 million of GGR in 2024 vs. \$480 million in 2021).
  - Additionally, media and league partnerships with sports betting entities will enable further integration between gambling and sports and entertainment.





# About Spectrum Gaming Group

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- Founded in 1993
- Specialize in studying, analyzing the economics, regulation and policy of legal gambling worldwide
- Policy of non-partisanship: We neither advocate for nor oppose legalized gambling
- Policy of independent research and analysis: We do not accept engagements that seek a preferred result; we tell clients what they need to know, not what they necessarily want to hear
- We have provided expertise in 42 US states and territories and in 48 countries on six continents. Clients include 22 US state and territory governments, six national governments, 22 Native American entities, numerous gaming companies (national and international) of all sizes, financial institutions, developers and other gaming-related entities
- We have testified or presented before 40 governmental bodies worldwide
- **Contact:** +1.609.926.5100 | [solutions@spectrumgaming.com](mailto:solutions@spectrumgaming.com)

**Jana Lemrick / Director, Human Resource  
and Suzanne Watson /Director, Community  
Services**

**Discussion on the recommendation by the  
SWIA MHDS Region for a future 28E  
agreement between the SWIA MHDS Region  
and Pottawattamie County.**



**Paula Hazelwood/Executive Director and  
Shalimar Mazetis/Manager Entrepreneurial  
Development from Advance Southwest Iowa  
Corporation.**

**Presentation to the Board on the RPCIC  
Priority Projects.**

**Kristine Sorenson/Director, Western Iowa  
Development Association**

**Presentation to the Board on the Western  
Iowa Development's annual report.**

# ANNUAL REPORT

2021

## WESTERN IOWA DEVELOPMENT ASSOCIATION

712 South Highway Street, PO Box 129  
Oakland, IA 51559  
[www.widaiowa.org](http://www.widaiowa.org)



Established 1987

# THANK YOU FY2021 SUPPORTERS

a bit of IOWA  
Arbor Bank  
Austin Henningsen Real Estate  
Avoca Main Street  
Breezy Hills Vineyard  
Dairy Queen  
Destination Coffee & Cuisine  
EZ Greenhouse, Inc.  
Farm Bureau Insurance - Pete Sorenson  
The Finish Line Car Wash  
Frosting, Inc.  
Great Western Bank  
Hummel Insurance Services  
Keast Chevrolet  
Marne Elk Horn  
Minden Meat Market  
Neola Area Community Center  
Oakland Industrial Foundation  
Olesen Auto Center  
Omnitel Communications  
OSI Industries, LLC  
Painted Camel Art Gallery  
Pennys Visions Art Gallery  
Prairie Crossing Vineyard & Winery  
Rachel Dorr Accounting  
Rolling Hills Bank & Trust  
Stanley's Snack Shack/Honey Creek Creamery  
TFS Farm Solutions /TFS Agronomy  
The Home Agency  
TiNik, Inc.  
Treynor Java Supply  
Western Ventures, Inc.  
Zimmerman's Sales & Services

## **MISSION:**

Provide leadership to rural community members that will promote economic development and improve quality of life.

## **VISION:**

Coordinate cities, businesses, schools, nonprofit and community organizations, and residents into a cohesive cooperative by serving as a hub of resources and communication.

## **CORE VALUES:**

We believe in our members.  
We believe in our communities.  
We encourage member participation.  
We believe in being progressive and relevant.  
We will be fiscally responsible.  
We will be the voice of our members.  
We will operate with honesty and integrity.

## **FOCUSED ON:**

Economic Development  
Business Advocacy  
County Enhancement  
Tourism  
Communication

*"Our first priority is you. Whether through business advocacy, connections to other groups and businesses or new opportunities, we are here for you."*

*~Kristine Sorenson  
Executive Director*

# MEETING THE NEEDS OF OUR MEMBERS AND COMMUNITIES

WIDA continues its' efforts to engage members and the community through its website, social media platforms, electronic newsletters (print newsletters as requested), and email communication. These outlets allow us to remain on the cutting edge of digital communications as well as provide traditional forms of communication.

## 2021 IN NUMBERS



### FACEBOOK

Total Reach: 43,593 (+5%)

Page Visits: 2,211 (+1.7%)

Page Likes: 1241 (+36%)

Page Followers: 1394 (+48%)



### INSTAGRAM

Total Reach: 5,879 (+100%)

Page Visits: 161 (+100%)

New Instagram Followers: 89



### PINTEREST

Total Impressions: 2, 445

Engagements: 50



### WIDA WEBSITE

Page Views: 11,978

Newsletter Views: 283 (+122.51%)



### MEMBERSHIP

Total Members: 33

New Members: 22

Member Retention Rate: 100%



### ADDITIONAL

Blog Posts: 26

Ribbon Cutting Events: 13

Newsletter Subscribers: 1039

2021 was another solid year for WIDA! We increased our membership base up to 33 with a retention rate of 100%. Membership interest remains strong and is growing on a regular basis.

This past year included attending community events, presentations at monthly city meetings, meeting with our business community to make connections, addressing concerns and discussing how we can work together as more connected communities. We hosted our first Employment Fair upon the request of business members and continue to work with Iowa Workforce to address rural employment struggles. We have rebranded and are in the process of developing a new website with the focus on economic growth, destination marketing and well-being of the business communities. WIDA also serves on the Pottawattamie Countywide Tourism Promotion Committee, creating marketing and opportunities for growing tourism in the region. We are proud to be the voice for businesses in our rural communities.

City of Avoca  
City of Carson  
City of Crescent  
City of Hancock  
City of Macedonia  
City of McClelland  
City of Minden  
City of Oakland  
City of Shelby  
City of Treynor  
City of Underwood  
City of Walnut



# CREATING OPPORTUNITIES TO MOVE POTTAWATTAMIE COUNTY FORWARD

## 2021 BOARD OF DIRECTORS

### **President**

*Kevin Zimmerman*

### **Vice President**

*Mike Holton*

*Dennis Bardsley*

*Scott Belt*

*Randall Cody*

*Norm Fandel*

*Trace Frahm*

*Susan Goos*

*Lynn Grobe*

*Cala Hough*

*Adam Houser*

*Mitch Kay*

*Ron Kroll*

*Amber Mohr*

*Pat Newberg*

*Joe Riddle*

*Brian Shea*

*Cindy Sorlein*

### **Golden Hills RC&D**

*Michelle Wodtke Franks*

*Lance Brisbois*

### **Executive Director**

*Kristine Sorenson*



**Tracy Nosekabel / Environmental Health  
Coordinator**

**Discussion and/or decision to approve  
appointment of Tracy Nosekabel as County  
Weed Commissioner.**





# 2022 COUNTY WEED COMMISSIONER CERTIFICATION FORM

For the County of: \_\_\_\_\_

## Weed Commissioner's Contact Information:

Name	Year Appointed
Mailing Address	Telephone
City, Zip Code	Alternate Telephone
Email Address	Pesticide Certificate #

Signed: \_\_\_\_\_ Date: \_\_\_\_\_  
Chair/President, County Board of Supervisors

PLEASE RETURN THIS FORM TO:

**IOWA DEPARTMENT OF AGRICULTURE AND LAND STEWARDSHIP**  
**State Weed Commissioner**  
**2230 South Ankeny Boulevard**  
**Ankeny, IA 50023-9093**

### 317.3 Weed commissioner -- standards for noxious weed control.

The board of supervisors of each county may annually appoint a county weed commissioner who may be a person otherwise employed by the county and who passes minimum standards established by the department of agriculture and land stewardship for noxious weed identification and the recognized methods for noxious weed control and elimination. The county weed commissioner's appointment shall be effective as of March 1 and shall continue for a term at the discretion of the board of supervisors unless the commissioner is removed from office as provided for by law. The county weed commissioner may, with the approval of the board of supervisors, require that commercial applicators and their appropriate employees pass the same standards for noxious weed identification as established by the department of agriculture and land stewardship. The name and address of the person appointed as county weed commissioner shall be certified to the county auditor and to the secretary of agriculture within ten days of the appointment. The board of supervisors shall fix the compensation of the county weed commissioner and deputies. In addition to compensation, the commissioner and deputies shall be paid their necessary travel expenses. At the discretion of the board of supervisors, the weed commissioner shall attend a seminar or school conducted or approved by the department of agriculture and land stewardship relating to the identification, control, and elimination of noxious weeds.

The board of supervisors shall prescribe the time of year the weed commissioner shall perform the powers and duties of county weed commissioner under this chapter which may be during that time of year when noxious weeds can effectively be killed. Compensation shall be for the period of actual work only although a weed commissioner assigned other duties not related to weed eradication may receive an annual salary. The board of supervisors shall likewise determine whether employment shall be by hour, day or month and the rate of pay for the employment time.

**Tracy Nosekabel / Environmental Health  
Coordinator**

**Discussion and/or decision to approve  
appointment of Alexander McGee as County  
Weed Commissioner.**



# 2022 COUNTY WEED COMMISSIONER CERTIFICATION FORM

For the County of: Pottawattamie

### Weed Commissioner's Contact Information:

Name Alexander McGee	Year Appointed 2022
Mailing Address 223 S 6th St	Telephone 712-328-4857
City, Zip Code Council Bluffs, IA, 51501	Alternate Telephone 402-699-3427
Email Address Alexander.McGee@pottcounty-ia.gov	Pesticide Certificate # Awaiting Certificate

Signed: \_\_\_\_\_ Date: \_\_\_\_\_  
Chair/President, County Board of Supervisors

PLEASE RETURN THIS FORM TO:

**IOWA DEPARTMENT OF AGRICULTURE AND LAND STEWARDSHIP**  
**State Weed Commissioner**  
**2230 South Ankeny Boulevard**  
**Ankeny, IA 50023-9093**

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The board of supervisors shall prescribe the time of year the weed commissioner shall perform the powers and duties of county weed commissioner under this chapter which may be during that time of year when noxious weeds can effectively be killed. Compensation shall be for the period of actual work only although a weed commissioner assigned other duties not related to weed eradication may receive an annual salary. The board of supervisors shall likewise determine whether employment shall be by hour, day or month and the rate of pay for the employment time.

**Tracy Nosekabel / Environmental Health  
Coordinator**

**Discussion and/or decision to approve and  
sign Resolution No. 12-2022 entitled  
Resolution for the Destruction of Noxious  
Weeds.**

**RESOLUTION NO. 12-2022  
RESOLUTION FOR THE DESTRUCTION OF NOXIOUS WEEDS**

**NOTICE TO ALL PROPERTY OWNERS AND THOSE IN CONTROL THEREOF:** You are hereby notified that the Board of Supervisors of Pottawattamie County, Iowa, did on the 1st day of March, 2022, pass the following resolution:

**BE IT RESOLVED BY THE BOARD OF SUPERVISORS OF POTTAWATTAMIE COUNTY, IOWA,** that pursuant to the provisions of Chapter 317.14, Code of Iowa, it is hereby ordered:

1. That each person in possession or control of all noxious weeds thereon as defined in this Chapter, at such times each year and in such a manner as shall prevent said weeds from blooming or coming to maturity, and shall keep lands free from such growth of any other weeds, as shall render the streets and highways adjoining said land unsafe for public travel. Noxious weeds shall be controlled, cut or otherwise destroyed between April 1 and November 15, 2022, as is necessary to prevent seed production.

**PRIMARY NOXIOUS WEEDS:**

- (1) Quack grass,
- (2) Perennial sow thistle,
- (3) Canada thistle,
- (4) Bull thistle,
- (5) European morning glory or field bindweed,
- (6) Horse nettle,
- (7) Leafy spurge,
- (8) Perennial pepper-grass,
- (9) Russian knapweed,
- (10) Buckthorn,
- (11) All species of thistles belonging in the genera of *Cirsium* and *Carduus*.
- (12) Palmer amaranth,

**SECONDARY NOXIOUS WEEDS:**

- (1) Butterprint annual,
- (2) Cocklebur annual,
- (3) Wild mustard annual,
- (4) Wild carrot biennial,
- (5) Buckhorn,
- (6) Sheep sorrel,
- (7) Sour dock perennial,
- (8) Smooth dock,
- (9) Poison hemlock,
- (10) Multiflora rose,
- (12) Puncture vine,
- (13) Teasel biennial,
- (14) Shattercane

2. That each owner and each person in possession or control of any land in Pottawattamie County, Iowa, infested with any Primary and Secondary Noxious Weed, and all other species of thistles belonging to the genera of *Cirsium* and *Carduus*, shall adopt or enter into a program of weed destruction, and treatment of control, described by the Weed Commissioner, which in five years may be expected to destroy and will immediately keep under control such infestation of said noxious weeds.
3. That all weeds other than noxious weeds on all county trunk and local county roads between the fence line thereof, shall be destroyed and controlled by the adjoining property owner, to prevent seed production.
4. That if the owners or persons in possession or control of any land in Pottawattamie County fails to comply with the foregoing order, the Weed Commissioner shall cause this to be done and the expense of said work, including cost of serving notice and other costs, if any, to be assessed against the land and their owners thereof.
5. That the County Auditor be and is hereby directed to cause notice of this making and entering of the foregoing order shall be given by one publication in each of the official newspapers of the County.

**DATED THIS 1<sup>st</sup> DAY OF March 2022.**

ROLL CALL VOTE

	AYE	NAY	ABSTAIN	ABSENT
_____ Tim Wichman, Chairman	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
_____ Justin Schultz	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
_____ Scott Belt	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
_____ Brian Shea	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
_____ Lynn Grobe	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

ATTEST: \_\_\_\_\_  
Melvyn J. Houser, County Auditor

**John Rasmussen / Engineer**

**Award or reject bids received on February  
22, 2022, for the Roads Operations Center  
buildings.**

**Charles Hildreth / Mayor, City of Crescent**

**Discussion and/or decision to offer support for the City of Crescent's application for grant funding from the state of Iowa's Water Infrastructure Fund and to approve the Board Chairman to sign a letter of support.**



# CITY OF CRESCENT

**P.O. BOX 16  
CRESCENT, IA 51526  
TELEPHONE: (712) 545-3981**

Tuesday March 1<sup>st</sup>, 2022

RE: Letter of Support for the City of Crescent's Wastewater Treatment Facility (lagoon) application for Water Infrastructure Fund Grant Funding

Dear Sir/Madam,

On behalf of the City of Crescent, I am pleased to offer this letter of support of the City of Crescent's application for grant funding from the State of Iowa's Water Infrastructure Fund. As a leading City, we are committed to the continued economic growth and vitality of our City and Region with a focus on environmental sustainability and stewardship to enhance the overall livability of our area. Crescent is a growing community and needs upgraded wastewater treatment capacity/infrastructure to support our continued growth. Our community offers a wide range of housing options to support the growing local economies of Council Bluffs and all of Pottawattamie County.

The City's Wastewater Treatment lagoon is in need of upgrades to its existing infrastructure to meet more stringent discharge limits. WIF funding will assist the City in its efforts to develop and implement a comprehensive strategy to meet these new limits to accommodate new economic development opportunities. Specifically, the City's proposed use of WIF funding will be used to fully implement an environmentally sustainable Project deploying innovative wastewater treatment upgrades that require less energy, use less chemicals and capture carbon dioxide.

In conclusion, our City is committed to and fully endorses this request for funding which will ensure the continued economic vitality of the Crescent region.

Sincerely,

Charles Hildreth  
Mayor, City of Crescent

Tim Wichman  
Chairman, Pottawattamie County Board of Supervisors

**Other Business**

**Discussion and/or decision on Veteran  
Affairs Commission Ex Officio members.**

**Jana Lemrick / Director, Human Resources;  
Michael Williams and Jim Garbina / FNIC  
Group**

**Update / discussion on FY 21/22 employee  
health insurance.**

**Received/Filed**

**Closed Session**



## **BUDGET DISCUSSION**

**Discussion only**