

Q6. When does your jurisdiction's fiscal year end?

- March 31
- June 30
- September 30
- December 31
- Other (please specify) _____
- Don't Know

Q7. Thinking about your jurisdiction's last fiscal year, were revenues and expenditures higher or lower than what they were projected to be in its originally adopted general fund budget?

| | Significantly Higher | Somewhat Higher | As Originally Budgeted | Somewhat Lower | Significantly Lower | Don't Know |
|---------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| General fund revenues | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| General fund expenditures | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Q8. Different local jurisdictions manage their unreserved/unassigned general fund balances in different ways depending on their specific circumstances. Despite these differences, we're interested in tracking overall changes in these balances over time. Approximately what was your jurisdiction's unreserved/unassigned general fund balance as a percentage of general fund expenditures at the end of its last fiscal year?

- 0% or less
- 1-10%
- 11-20%
- 21-30%
- 31-40%
- 41-50%
- 51-60%
- 61-70%
- 71-80%
- 81-90%
- 91-100%
- Over 100%
- Don't Know

Q9. Thinking about your jurisdiction's fiscal needs, overall, do you consider your jurisdiction's unreserved/unassigned general fund balance to be too high, about right, or too low?

- Too High
- About Right
- Too Low
- Don't Know

Q10. In your opinion, is your jurisdiction's cash flow and its ability to pay bills in a timely manner a significant fiscal problem, somewhat of a problem, not much of a problem, or not a problem at all?

- A significant problem
- Somewhat of a problem
- Not much of a problem
- Not a problem at all
- Don't Know

Q11. Now, thinking about the overall fiscal stress in your jurisdiction today and what you expect it to be down the road — including any future financial obligations it may have — on a scale from 1 to 10, where 1 is the best: perfect fiscal health and 10 is the worst: fiscal crisis, how would you rate your jurisdiction's overall fiscal stress...

| | The Best: Perfect Fiscal Health | | | | | | | | | | The Worst: Fiscal Crisis | | Don't Know |
|---|---------------------------------|---|---|---|---|---|---|---|---|----|--------------------------|--|--------------------------|
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | | | |
| ... today? | | | | | | | | | | | | | <input type="checkbox"/> |
| ... as you expect it to be five years from now? | | | | | | | | | | | | | <input type="checkbox"/> |

Q12. What factor(s) were you thinking about when rating your jurisdiction's overall fiscal stress?

Q13. Regardless of whether or not your jurisdiction expects to have a budget surplus this year, in your opinion, what would be the highest priority for using any potential surplus (if it had one) according to the following groups or individuals? Do you think that they would prefer to spend the budget surplus on public services or infrastructure, save that money for future use, use it to pay down any debt your jurisdiction may have, or reduce taxes?

| | Spend on public services or infrastructure | Save for future use | Pay down any debt | Reduce taxes | Don't Know |
|--|--|--------------------------|--------------------------|--------------------------|--------------------------|
| Majority of your jurisdiction's Board/Council would prefer to... | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Majority of your jurisdiction's citizens would prefer to... | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| You personally in your role as a local official would prefer to... | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Q14. Now, regardless of whether or not your jurisdiction expects to have a budget deficit this year, in your opinion, what would be the preferred method for eliminating any potential deficit (if it had one) according to the following groups or individuals? Do you think that they would prefer to cut costs/services, increase taxes, use any savings your jurisdiction may have, or increase debt (if legally allowable)?

| | Cut costs/services | Increase taxes | Use any savings | Increase debt | Don't Know |
|--|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| Majority of your jurisdiction's Board/Council would prefer to... | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Majority of your jurisdiction's citizens would prefer to... | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| You personally in your role as a local official would prefer to... | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Next, we have a number of questions about retirement income benefits that your jurisdiction may offer to its employees and/or elected officials.

Q15. First, does your jurisdiction offer any kind of retirement income benefits (defined benefit pensions, defined contribution plans such as an IRA, 401a, 457b, or 401k-type plan, etc.) to any current or former employees and/or elected officials?

Yes (Skip to Q17)

No

Don't Know → (Skip to Q25)

Q16. (If you selected "no" in Q15) Do you think your jurisdiction should be providing retirement income benefits to...

| | Yes | No | Not Applicable | Don't Know |
|---|--------------------------|--------------------------|--------------------------|--------------------------|
| ... current and/or retired employees? (If your jurisdiction has no employees, please select "Not Applicable.") | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ... current and/or former elected officials? | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> |

After answering Q16, skip to Q25.

Q17. (If you selected "yes" in Q15) There are a number of different types of retirement income benefits that local governments might offer personnel, including a defined contribution plan (i.e., IRA, 401a, 457b, or 401k-type plan), a defined benefit plan (i.e., a traditional pension), or a hybrid plan (i.e., a plan that combines features of both defined benefit and defined contribution plans for an individual). Which type(s) of retirement income benefits, if any, does your jurisdiction offer to each of the following groups? (If your jurisdiction has no employees, please select "Not Applicable" below on the employee-specific questions. Check all that apply.)

| | Defined Contribution | Defined Benefit | Hybrid | No Retirement Income Benefits | Not Applicable | Don't Know |
|---------------------------|--------------------------|--------------------------|--------------------------|-------------------------------|--------------------------|--------------------------|
| New hires | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Current employees | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Retired employees | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Current elected officials | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> |
| Former elected officials | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Q18. (If you selected "yes" in Q15) Overall, do you consider your jurisdiction's retirement income benefits — or lack thereof — for each of the following groups to be too generous, about right, or not generous enough? (If your jurisdiction has no employees, please select "Not Applicable" below on the employee-specific questions.)

| | Too Generous | About Right | Not Generous Enough | Not Applicable | Don't Know |
|---------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| New hires | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Current employees | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Retired employees | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Current elected officials | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> |
| Former elected officials | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

PLEASE NOTE: If you selected "defined benefit" or "hybrid" for any groups in Q17, continue with Q19. Otherwise, skip to Q25.

Q19. Which of the following actions, if any, has your jurisdiction taken so far regarding its defined benefit and/or hybrid pension plans for any of its employees, elected officials, or retirees? (check all that apply)

- Had an actuarial valuation of our defined benefit pension within the last 2 years
- Increased the years of service required and/or the age at which retirement benefits are available
- Increased employee contribution to defined benefit portion of the pension
- Reduced the multiplier that helps determine pension payments based on final average salary
- Reduced, eliminated, or postponed the cost of living adjustment (COLA)
- Decreased the assumed rate of return for stock market investments in the pension fund
- Closed defined benefit pension to new individuals
- Converted to a defined contribution (IRA, 401a, 457b, or 401k-type) plan
- Converted to a hybrid (defined benefit and defined contribution) plan
- Financed liability through bonds
- Other (please specify) _____
- Don't Know

Q20. Overall, how effective would you say your jurisdiction's efforts, if any, have been at controlling costs related to its retirement income benefits?

| | | | | | |
|--------------------------|--------------------------|-----------------------------------|--------------------------|--------------------------|--------------------------|
| Very Effective | Somewhat Effective | Neither Effective Nor Ineffective | Somewhat Ineffective | Very Ineffective | Don't Know |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Q21. A jurisdiction's "actuarially required contribution" (ARC) to its pension fund is based on the benefits earned by employees in the current year, plus an amount to reduce any unfunded liabilities for past years. Some jurisdictions pay their ARC in full each year. Others do not, and may just pay as they go for only that year's pension costs.

Thinking specifically about defined benefit (i.e., traditional pensions) and/or hybrid plans, which of the following statements best describes your jurisdiction's contributions to its pension fund during its previous fiscal year?

- We made no contribution to our pension fund.
- We made some contribution to our pension fund, but not the full ARC.
- We made our full ARC contribution.
- We made a contribution larger than the ARC.
- Don't Know

Q22. To the best of your knowledge, are your jurisdiction's pension obligations currently fully funded?

- Yes No Don't Know

Q23. Regardless of whether or not your jurisdiction's defined benefit and/or hybrid plan pension obligations are currently fully funded, in your opinion, are these obligations a significant fiscal problem, somewhat of a problem, not much of a problem, or not a problem at all for your jurisdiction's fiscal health?

- A significant problem Somewhat of a problem Not much of a problem Not a problem at all Don't Know

Q24. Looking ahead, how concerned are you, if at all, that your jurisdiction will not be able to fulfill its pension obligations to its retirees?

- Very concerned Somewhat concerned Not very concerned Not concerned at all Don't Know

Next, we have a number of questions about retiree health care benefits that your jurisdiction may provide. Many of these questions mirror previous questions about retirement income benefits.

Q25. Does your jurisdiction provide any kind of retiree health care benefits to any current or former employees and/or elected officials?

- Yes (Skip to Q27) No Don't Know → (Skip to Q38)

Q26. (If you selected "no" in Q25) Do you think your jurisdiction should be providing retiree health care benefits to...

| | Yes | No | Not Applicable | Don't Know |
|--|--------------------------|--------------------------|--------------------------|--------------------------|
| ... current and/or retired employees? <i>(If your jurisdiction has no employees, please select "Not Applicable.")</i> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| ... current and/or former elected officials? | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> |

After answering Q26, skip to Q38.

Q27. To which of the following groups does your jurisdiction offer retiree health care benefits? (If your jurisdiction has no employees, please select "Not Applicable" below on the employee-specific questions.)

| | Offers Benefits | Does Not Offer Benefits | Not Applicable | Don't Know |
|---------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| New hires | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Current employees | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Retired employees | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Current elected officials | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> |
| Former elected officials | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Q28. Overall, do you consider your jurisdiction's retiree health care benefits — or lack thereof — for each of the following groups to be too generous, about right, or not generous enough? (If your jurisdiction has no employees, please select "Not Applicable" below on the employee-specific questions.)

| | Too Generous | About Right | Not Generous Enough | Not Applicable | Don't Know |
|---------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| New hires | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Current employees | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Retired employees | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Current elected officials | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> |
| Former elected officials | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Q29. Which of the following actions, if any, has your jurisdiction taken so far regarding its retiree health care benefits for any current or future retirees? (check all that apply)

- In the process of or have completed actuarial study to determine/quantify liability
- Increased cost-sharing by retirees (e.g., higher premiums, co-payments, deductibles, etc.)
- Increased the years of service required and/or the age at which retirement benefits are available
- Reduced or eliminated benefits for spouses and/or dependents
- Introduced less expensive health care and/or prescription plan options
- Implemented a wellness plan (e.g., incentives for annual physicals, weight management, smoking cessation, etc.)
- Converted to a defined contribution/stipend in place of a defined benefit health plan
- Introduced a retirement health savings account (HSA) option
- Financed liability through bonds
- Created or joined a qualified health care trust
- Transferred retiree health care management to a Voluntary Employee Beneficiary Association (VEBA)
- Other (please specify) _____
- Don't Know

Q30. Overall, how effective would you say your jurisdiction's efforts, if any, have been at controlling costs related to its retiree health care benefits?

- Very Effective Somewhat Effective Neither Effective Nor Ineffective Somewhat Ineffective Very Ineffective Don't Know
-

Finally, we have a few questions regarding the overall state of affairs in your jurisdiction and in Michigan more broadly.

Q38. Do you feel things in your jurisdiction are generally going in the right direction, or do you feel things have gotten off on the wrong track?

- Right direction Wrong track Don't Know

Q39. How would you rate the way your jurisdiction's governing board is performing its job?

- Excellent Good Fair Poor Don't Know

Q40. Do you feel things in the state of Michigan are generally going in the right direction, or do you feel things have gotten off on the wrong track?

- Right direction Wrong track Don't Know *(skip to Q42)*

Q41. Please briefly tell us the main reasons why you think things in the state of Michigan are generally going that way.

Q42. How would you rate the way Rick Snyder is performing his job as Michigan's governor?

- Excellent Good Fair Poor Don't Know

Q43. How would you rate the way the Michigan Legislature is performing its job?

- Excellent Good Fair Poor Don't Know

Q44. CLOSUP will protect your privacy and anonymity to the full extent provided by law. We need to confirm your personal information such as name, email address, and phone number for tracking and administrative purposes only. Your personal information will not be shared with any outside sources. As with all of the questions in this survey, these are optional.

Please provide us with...

Your name _____

Your phone number _____ - _____ - _____

Your email address _____

We would like to ask some demographic questions. As with all of the questions in this survey, these are optional. Responses will be reported in aggregate form only so that your individual responses will remain confidential.

Q45. What is your gender? Male Female

Q46. In what year were you born? 19 ____ ____

Q47. How many years have you served in your current position? _____

Q48. Are you of Spanish, Hispanic, or Latino descent? Yes No

Q49. Please check one or more categories below to indicate what race(s) you consider yourself to be. *(check all that apply)*

- | | |
|--|--------------------------------------|
| <input type="checkbox"/> White | <input type="checkbox"/> Asian |
| <input type="checkbox"/> Black or African American | <input type="checkbox"/> Multiracial |
| <input type="checkbox"/> American Indian or Alaskan Native | <input type="checkbox"/> Other |
| <input type="checkbox"/> Native Hawaiian or other Pacific Islander | <input type="checkbox"/> Don't Know |

Q50. What is the highest degree or level of school you have completed?

- | | |
|--|--|
| <input type="checkbox"/> 12th grade or less/no diploma | <input type="checkbox"/> Bachelor's degree |
| <input type="checkbox"/> High school graduate or GED | <input type="checkbox"/> Master's degree |
| <input type="checkbox"/> Some college, no degree | <input type="checkbox"/> Professional/Doctorate degree |
| <input type="checkbox"/> Associate's degree | |

Q51. Generally speaking, do you think of yourself as a...?

- Republican Independent Democrat Something else *(please specify)* _____

Q52. *(If Republican or Democrat)* Would you consider yourself a strong or not very strong Republican/Democrat?

- Very strong Not very strong Don't Know

Q53. *(If Independent or something else)* Would you consider yourself closer to...?

- The Democratic Party The Republican Party Neither