



# OKLAHOMA

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## FAST FACTS

December 2021

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Oklahoma State Senate Fiscal Staff

# INTRODUCTION

Oklahoma Fast Facts is a quick reference guide designed to provide Senators with convenient access to facts, figures, and graphs about Oklahoma's state budget, as well as selected information on state government programs, taxes, demographics, and state rankings.

Though not a comprehensive fiscal report, Oklahoma Fast Facts will answer many frequently asked questions, in a format that is easily accessible. We hope the reader will find this document handy and helpful.



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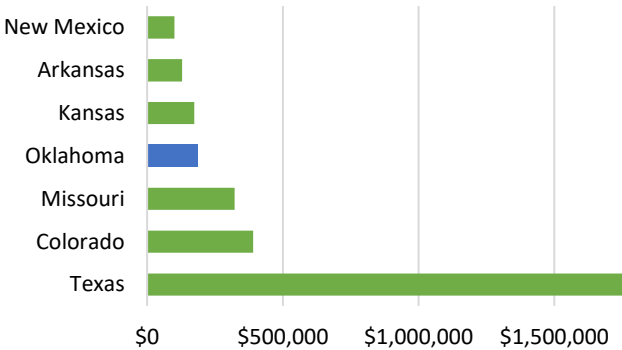
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## OKLAHOMA'S ECONOMY

### Oklahoma's Economic Production Totalled \$186.6 billion in 2020

2020 Nominal GDP  
(In Millions)



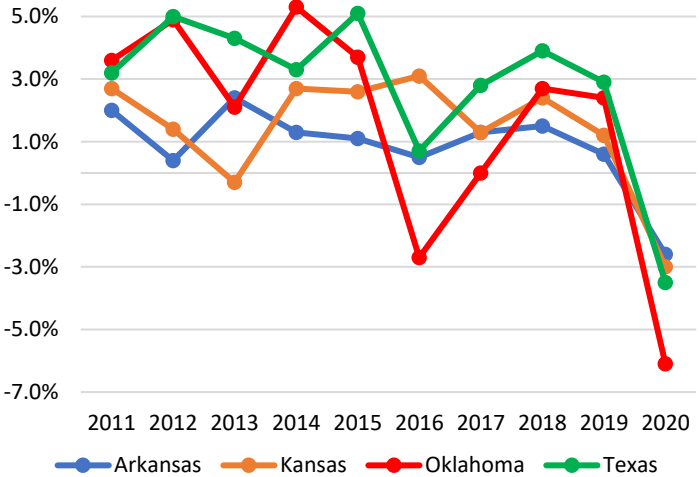
- Oklahoma's economic output represents 0.89% of total United States output, while its population makes up 1.19% of total United States population.
- Real Estate, Manufacturing, and Health Care make up the largest private segments of Oklahoma's economy.

Economy	Value	US Rank
Gross Domestic Product (2020)	\$186.58 billion	29
Real, Compound Annual GDP Growth Rate (2010-2020)	1.50%	16
Personal Income (2020)	\$196.05 billion	29
Per Capita Personal Income (2020)	\$49,249	41
Median Household Income (2019)	\$54,449	43
Cost of Living Index (2nd quarter, 2021)	88.6	3

Sources: Bureau of Economic Analysis; U.S. Census Bureau, Missouri Economic and Information Center

## OKLAHOMA'S ECONOMY

### GDP Percent Growth by Year 2011 – 2020



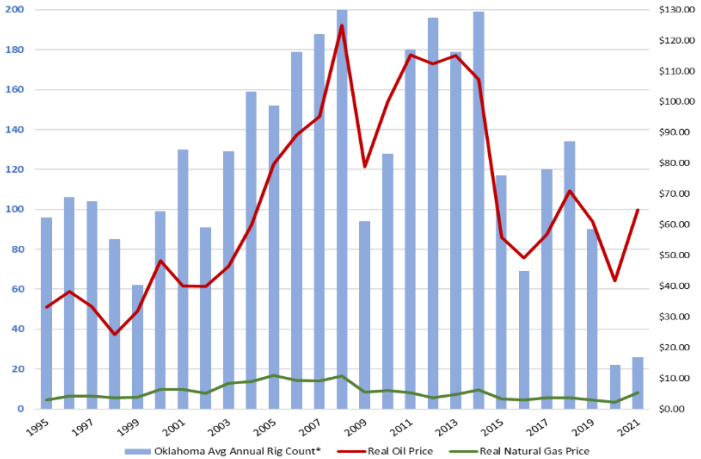
Source: Bureau of Economic Analysis

- Oklahoma's compound annual real GDP growth rate the last ten years was 1.3%, the third largest growth rate of all bordering states behind Texas (2.7%) and Colorado (3%).
- The fastest growing industrial category in Oklahoma the last decade was information, which grew at a compound annual rate of 6.0%. This was followed by transportation and warehousing (5.0%).
- The counties with the fastest annual real GDP growth rate the last decade were Grant (12.2%), Woods (11.8%), Dewey (8.9%), and Hughes (8.9%).



## OKLAHOMA'S ECONOMY

### Energy Prices and Rig Counts in Oklahoma



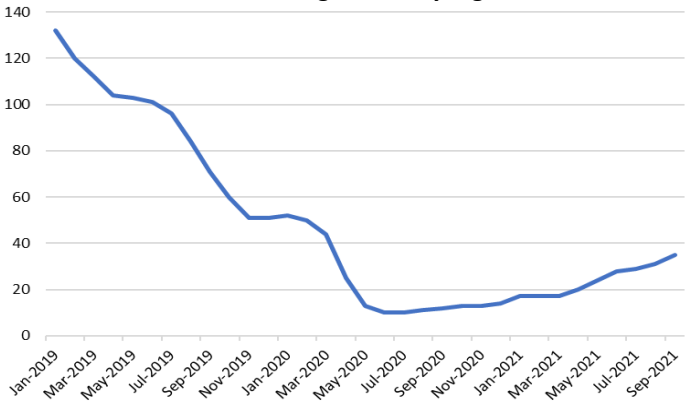
Source: Baker Hughes; Energy Information Administration

\*Annual average of average monthly rig count. 2021 average through October 15th rig count report.

Inflation adjusted, Natural gas pipeline export prices and Cushing WTI oil spot prices; 2021 WTI price through the end of September and natural gas price through the end of July.

Rig counts in Oklahoma are slow to increase in recent years as investors within the industry pressure companies to prioritize dividends over new investment.

### Oklahoma Average Monthly Rig Count

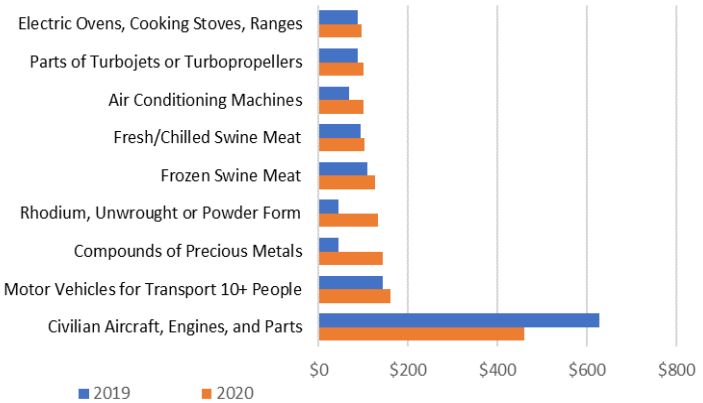


Source: Baker Hughes

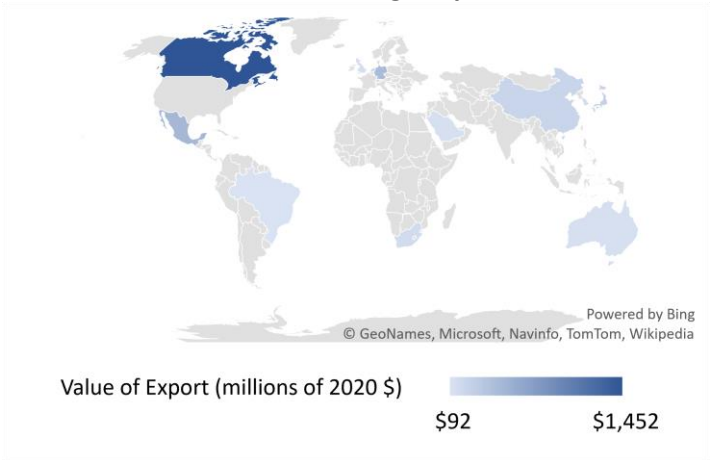
(Average through October 15, 2021, rig count report)

## OKLAHOMA'S ECONOMY

### Top Manufactured Commodity Exports (in millions)



### Oklahoma Foreign Exports

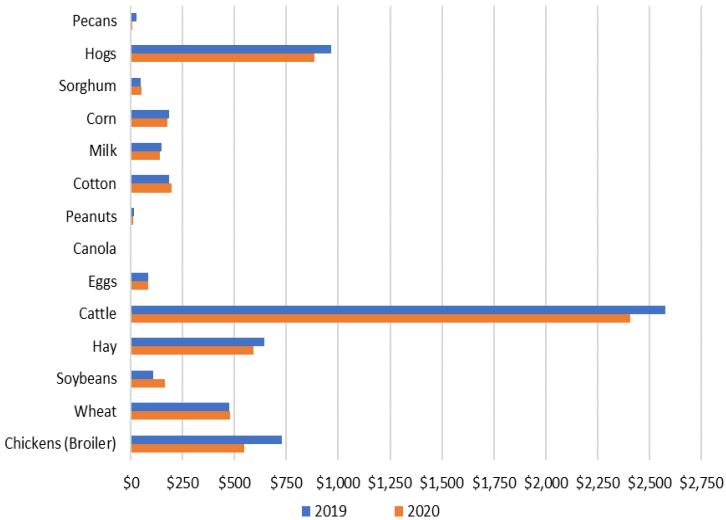


Source: Census Bureau

- Several foreign exports were affected by the pandemic. Exports of catalyst with precious metals, heat exchange units, and data transmission machines decreased 82%, 44%, and 40%, respectively, from 2019.
- Oklahoma foreign exports decreased by 12.5%, year over year, and exports to Mexico decreased by 39%.

## OKLAHOMA'S ECONOMY

### Oklahoma Agricultural Commodity Production (in millions)

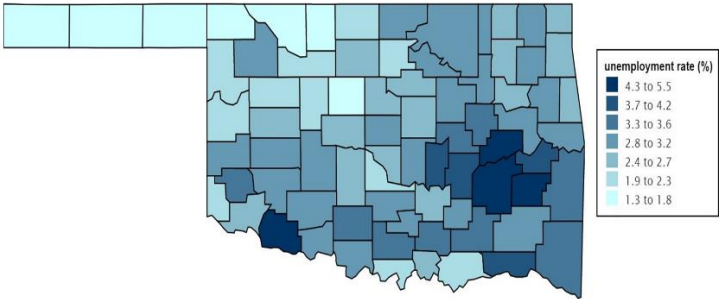


Source: USDA-NASS; ODAFF

- Total commercial red meat production for the year 2020 was 1.34 billion pounds, up 10 percent from 2019.
- Cash receipts for Oklahoma agricultural commodities sold in 2020 totaled \$6.13 billion, down 9 percent from 2019.
- Average farmland value, including both cropland and pasture, is \$2,020 per acre, an increase of 15.4% from 2017.
- The USDA estimates Oklahoma exported \$1.83 billion of agricultural commodities in 2019.

## OKLAHOMA'S ECONOMY

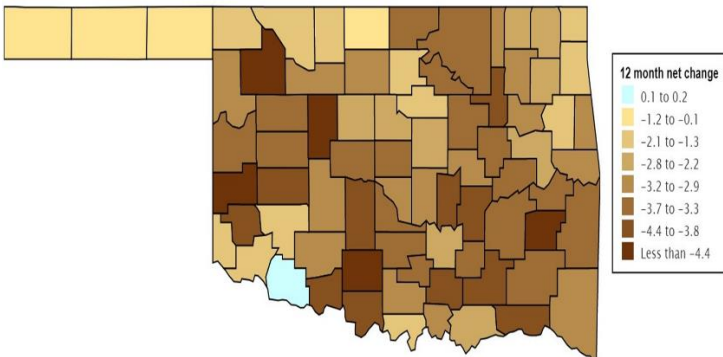
### Unemployment Rates by County, Not Seasonally Adjusted, August 2021



The preliminary October unemployment rate of 2.7% is ranked third in the nation, and is a record low for this state. (The Bureau of Labor Statistics began state survey series in 1976)

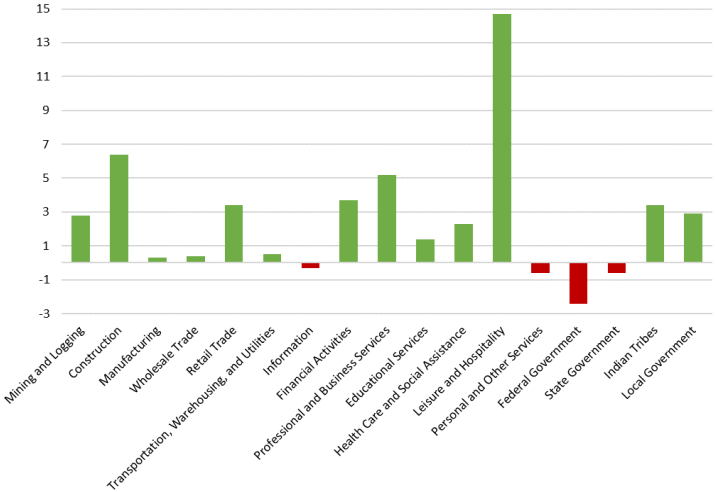
Oklahoma has seen significant reductions in unemployment, except for the panhandle and portions of the northwest where the unemployment rate remained low during the 2020 recession and Tillman County where the unemployment rate has increased slightly.

### 12-Month Change in Unemployment Rates by County, Not Seasonally Adjusted, August 2021



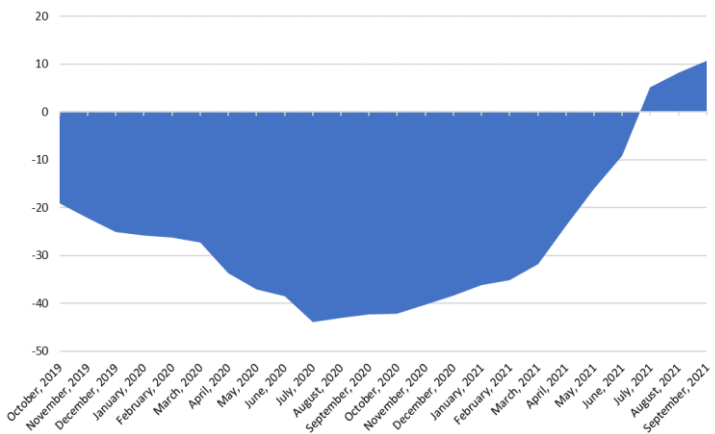
## OKLAHOMA'S ECONOMY

### September 2020, to September 2021, Change in Employment (In Thousands)



Over 14,000 employees have joined or rejoined the hospitality industry over the last year.

### 12 Month % Change in Employees (Mining and Logging)

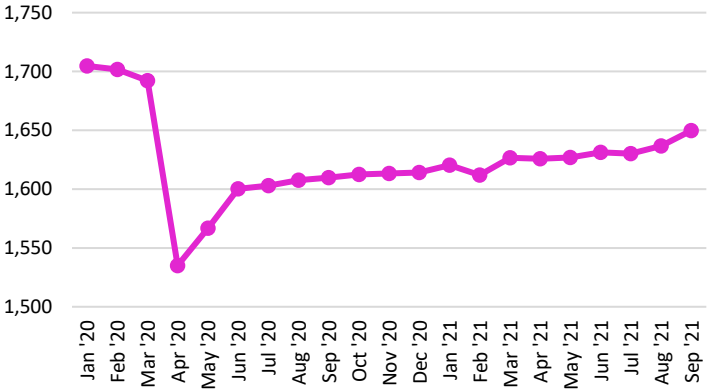


Source: Bureau of Labor Statistics

The mining and logging industry, which includes oil and gas, is beginning to see increases in employment, but still has over 10,000 fewer employees from the beginning of the pandemic.

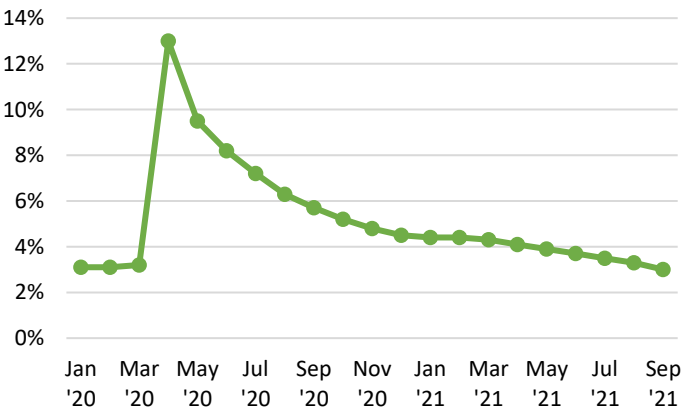
## OKLAHOMA'S ECONOMY

### Oklahoma Total Nonfarm Employees (In Thousands)



Oklahoma's unemployment rate is now lower than before the beginning of the pandemic, but total employment is down as more people have retired or left the workforce. The labor force participation rate is 60.4%, four-tenths of a point lower than January 2020.

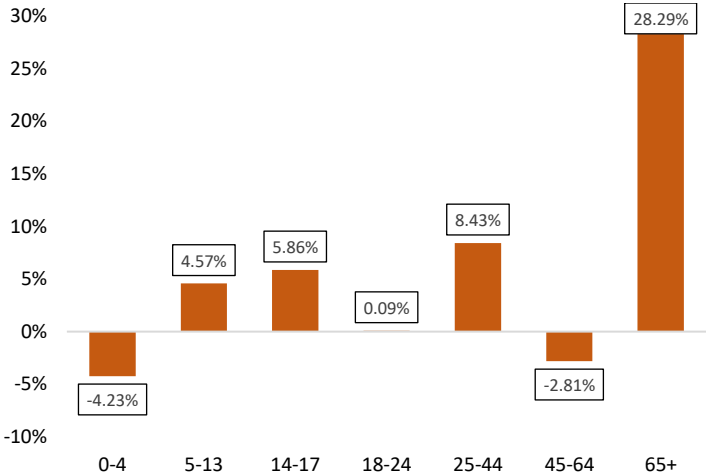
### Oklahoma Monthly Unemployment Rate



Source: Bureau of Labor Statistics

## OKLAHOMA'S ECONOMY

**Percentage Growth of Population by Age Groups  
2010-2020**



Much like other states, Oklahoma has an aging population.

The median age of Oklahoma's population increased from 36.3 years in 2010 to 37 in 2020.

Population Estimates	Value	US Rank
Population (2020 estimate)	3,959,353	28
2010-2020 Population Change	5.5%	26
Persons Per Square Mile (land area)	57.7	35
Net Domestic Migration (2018-2019)	8,306	17
Net Domestic Migration Rate (2018-2019)	0.21%	20

State Population Demographics	Value
Age	
Under 5 Years	6.37%
Under 18 Years	23.95%
65 Years and Over	16.41%
Female, Percent	50.48%
Veterans, 2014-2018	273,877

## OK BUDGET: REVENUE & APPROPRIATIONS

The state fiscal year begins on July 1 and ends on June 30 of the following year. The Oklahoma Constitution, Article X, Sec. 23, requires a balanced budget. Appropriations are limited to 95% of projected revenues and cannot exceed 12 percent in growth. The following is a breakdown of the budget cycle throughout the year:

- **July 1** – The new fiscal year begins.
- **July through October** – Agencies formulate their budget work program. Budget limits may be set by the Legislature in the preceding legislative session. Agencies begin formulating the budget request they will present for the next legislative session. This is a good time for advocacy groups to begin talking with state agencies about funding issues.
- **October 1** – Agencies submit their budget request to the Governor and Legislature for the upcoming fiscal year.
- **November** – Appropriation Subcommittees begin analysis of agency program performance measures and begin filing related reports. No appropriations can be made to an agency until these reports have been filed.
- **December** – The Board of Equalization meets for initial certification of revenues. This is the revenue estimate used for the Governor’s budget. This is the best time for advocacy groups to contact the Governor about program budgets.
- **February** – The Governor submits budget recommendations to the Legislature on the first day of session. The Board of Equalization meets for certification of revenues. This is the revenue estimate the Legislature is bound by constitutionally unless it passes a bill to increase or decrease revenue and that bill is signed by the Governor.



## OK BUDGET: REVENUE & APPROPRIATIONS

- **February through April** – Supplemental appropriations are considered for the current fiscal year. Subcommittees hold budget hearings for the up-coming fiscal year and move substantive bills with fiscal impacts through the process. This is the best time to talk to the Legislature about budget issues.
- **Late April to May** – The Subcommittees get their budget allocation and convene the General Conference Committee on Appropriations (GCCA). By this time, the Senate and House Appropriation Subcommittees have decided most of what they want to fund, and it is time to work out their differences in conference.
- **May** – The Legislature begins filing appropriation bills. During session, the Governor has 5 days to sign or veto a bill or it becomes law without their signature. If the bill is passed during the last week of session, the Governor has 15 days to sign it, or it becomes a pocket veto. The Governor has line-item veto authority over all appropriation bills. Vetoes can be overridden by a super-majority (2/3) vote by both the Senate and House of Representatives. Session ends on the last Friday in May.
- **June** – The Board of Equalization meets to certify any changes to certification as a result of legislation that was signed into law and to certify that the Legislature did not exceed its appropriation authority.
- **June 30** – The current fiscal year ends. Agencies submit Budget Work Programs to the Office of Management and Enterprise Services and the process starts over.

# OK BUDGET: REVENUE & APPROPRIATIONS

## Estimates of Revenue Available for Appropriations

Revenue Funds	FY '21	FY '22	% Change
<i>Non-Restricted</i>			
General Revenue	\$6,392,862,784	\$6,450,759,789	0.9%
CLEET*	\$2,935,267	\$2,510,658	-14.5%
Mineral Leasing*	\$3,800,000	\$5,225,000	37.5%
Spec. Occ. Health & Safety	\$760,000	\$902,500	18.8%
Public Building	\$1,793,144	\$1,598,917	-10.8%
Special Cash	\$531	\$0	-100.0%
<i>Restricted</i>			
CLO	\$8,993,745	\$8,406,944	-6.5%
OK ED Lottery Trust Fund	\$62,700,000	\$57,950,000	-7.6%
State Public Safety Fund*	\$24,367,443	\$23,149,071	-5.0%
Health Care Enhanc. Fund	\$144,863,600	\$147,611,950	1.9%
Alc. Bev. Control Fund	\$10,893,261	\$12,350,000	13.4%
OK Pension Impr. Fund	\$142,500	\$57,000	-60.0%
<i>Authorized</i>			
Common Ed Tech Fund	\$46,938,566	\$47,372,299	0.9%
OK Student Aid Fund	\$46,938,566	\$47,372,299	0.9%
Higher Ed Capital Fund	\$46,938,566	\$47,372,299	0.9%
1017 Fund	\$843,743,932	\$1,170,976,969	38.8%
Tobacco Settlement Fund	\$11,718,750	\$13,684,375	16.8%
State Judicial Rev Fund*	\$37,000,000	\$20,000,000	-45.9%
State Transportation Fund	\$216,191,489	\$206,208,873	-4.6%
ROADS Fund <sup>^</sup>	\$395,000,000	\$575,000,000	45.6%
<i>One time/ Irregular Sources</i>			
Cash Flow Reserve Fund	\$0	\$200,000,000	N/A
Prior Year Certified-GR	\$3,052,677	\$1,136,992,815	37145.8%
Cash - All funds	\$337,967,211	\$39,974,183	-88.2%
Subtotal	\$8,639,602,032	\$10,215,475,941	18.2%
<i>Session Changes/Actions</i>			
Total Impact from New Laws	\$322,441,306	-\$432,722,736	-234.2%
Special Cash**	\$75,000,000	\$38,000,000	-49.3%
Constitutional Reserve Funds	\$243,668,709	\$0	-100.0%
Revenue Stabilization Funds	\$162,500,000	\$0	-100.0%
Reappropriations	\$22,000,000	\$0	-100.0%
Revolving Funds	\$65,953,046	\$128,057,134	94.2%
<i>(not transferred to Special Cash)</i>			
Total	\$9,531,165,093	\$9,948,810,339	4.4%

FY '21: Data from 2020 June BOE packet: schedule 5, appendix A-1; 2021 Feb packet: schedule 3

FY '22: Data from 2021 June BOE packet, schedule 5, appendix A-1-Column 2

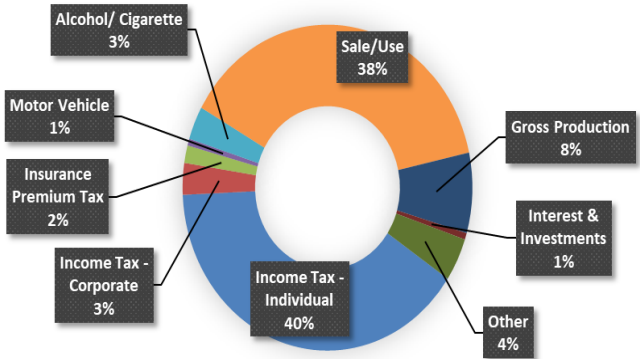
\* These funds experienced a revenue failure during FY '21. The CLEET Fund collections totaled \$2,708,800, the Mineral Leasing fund collections totaled \$2,738,164, the State Public Safety Revolving Fund collections totaled \$20,574,005 and the State Judicial Revolving Fund collections totaled \$26,736,576. Total revenue failure from these funds equal \$15,345,165.

\*\*Special Cash totals excludes amounts transferred from the Transportation Fund, which were \$46,191,489 for FY '21, and \$19,315,210 for FY '22.

<sup>^</sup> Beginning with FY'22, the ROADS fund is now an appropriated fund. To keep comparisons accurate, the amount apportioned in FY '21 is included.

## OK BUDGET: REVENUE & APPROPRIATIONS

### FY 2022 General Revenue Fund Sources



### General Revenue Funds\*

Revenue Source	FY '21	FY '22 (est.)	% Change
Income Tax - Individual	<b>\$2,742,360,543</b>	\$2,514,520,535	-8.3%
Income Tax - Corporate	<b>\$429,530,956</b>	\$198,479,748	-53.8%
Insurance Premium Tax	<b>\$109,846,112</b>	\$109,446,006	-0.4%
Motor Vehicle	<b>\$33,725,000</b>	\$42,926,700	27.3%
Alcohol/ Cigarette	<b>\$193,060,758</b>	\$209,003,824	8.3%
Sale/Use	<b>\$2,422,819,219</b>	\$2,421,658,510	0.0%
Gross Production	<b>\$397,669,655</b>	\$503,038,300	26.5%
Interest & Investments	<b>\$44,175,000</b>	\$40,850,000	-7.5%
Other	<b>\$287,159,743</b>	\$270,259,791	-5.9%
<b>Total</b>	<b>\$6,660,346,985</b>	<b>\$6,310,183,413</b>	<b>-5.3%</b>

\* These totals are 95% of collections due to the constitutional limits on appropriations.

FY '21: Figures in bold are from <https://oklahoma.gov/omes/media/financial-data-tables/2021/june-2021-financial-data-tables.html> ; Figures in highlighted cells are from the June BOE packet, Schedule 2, column 4. Bold figures show actual collections whereas highlighted are most current, available estimates.

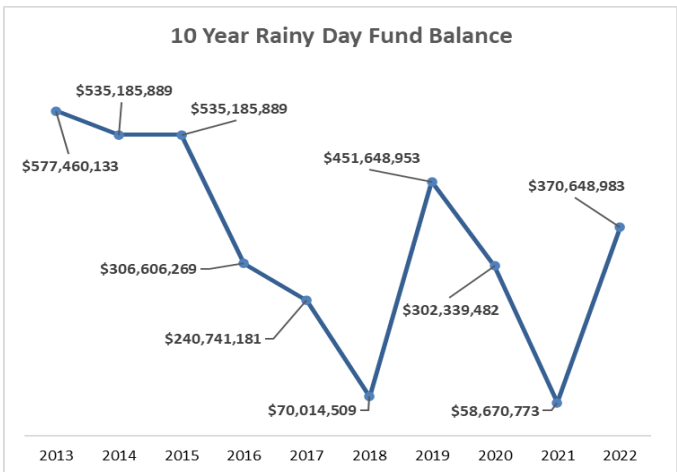
FY '22: Data from June BOE packet, schedule 2, column 6. This total is slightly different from the figure on the previous page because this one shows the effect of any new laws from the 2021 session on GR collections.

## OK BUDGET: REVENUE & APPROPRIATIONS

### Reserve Funds

The primary reserve fund for the state is the Constitutional Reserve Fund. Any revenue collected that exceeds the certified estimate by the BOE is deposited into the Constitutional Reserve (Rainy Day) Fund until it reaches a constitutional cap of 15 percent of the prior year's General Revenue Fund actual collections. The Rainy Day Fund can be used under the following conditions:

- 3/8 of the fund can be used if General Revenue fails to meet the estimate in the current fiscal year;
- 3/8 of the fund can be used if General Revenue is projected to decline from one year to the next;
- 1/4 of the fund can be used if there is an emergency declaration by the Governor and a 2/3 vote in both the Senate and the House, or this same 1/4 can be used without the Governor's declaration if there is a 3/4 vote by the Senate and the House.



Each year's balance represents the amount of funds in the Rainy Day account after all deposits and expenditures: the balance at the end of the fiscal year. FY 2022 is the current balance.

## OK BUDGET: REVENUE & APPROPRIATIONS

### 10-Year History of Rainy Day Fund Deposits

<u>Fiscal Year</u>	<u>Deposit</u>
2013	\$328,256,976
2014	\$2,725,756
2015	\$0
2016	\$0
2017	\$0
2018	\$0
2019	\$381,634,444
2020	\$354,589,664
2021	\$0
2022	\$311,978,210

### 10-Year History of Rainy Day Fund Expenditures

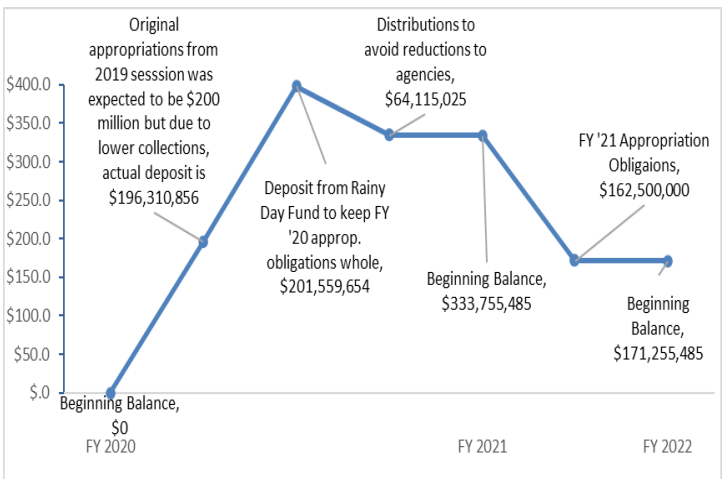
<u>Fiscal Year</u>	<u>Expenditures</u>	<u>Agency</u>	<u>Purpose</u>
2013	\$0		
2014	\$45,000,000	Emergency Management	Disaster assistance due to May storms
2015	\$0		
2016	\$126,000,000	SDE	State Aid and Operations
	\$102,579,620	Corrections	Duties and Operations
2017	\$65,865,088	SDE	State Aid
2018	\$111,185,000	SDE	State Aid and Ad Val. Reimb.
	\$32,000,000	OHCA	Operations
	\$23,338,170	ODMHSAS	Operations
	\$4,203,502	DHS	DDSD Waivers
2019	\$0		
2020	\$302,339,481	GRF	GR Fund obligations
	\$201,559,654	Revenue Stabil. Fund	Emergency funding to keep FY'20 whole
2021	\$243,668,709	SDE	State Aid
2022	\$0		

## OK BUDGET: REVENUE & APPROPRIATIONS

### Revenue Stabilization Fund

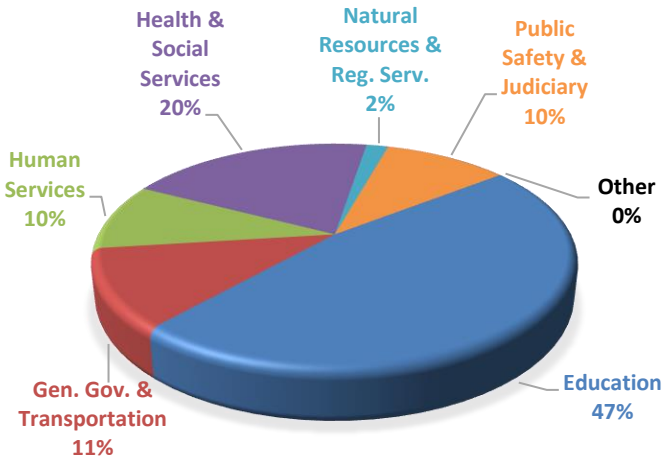
The Revenue Stabilization Fund was created in 2016 as a reserve fund to address revenue volatility in collections from gross production taxes and corporate income tax. Once actual revenue deposited into the General Revenue Fund, as certified by the BOE, equals or exceeds \$6.6 billion, then monies can be deposited into the fund. After that target is met, collections from gross production taxes and corporate income tax that exceed the moving 5-year average is diverted to the Revenue Stabilization Fund (for each respective tax). \$200 million was appropriated to be deposited into the fund for FY '20 even though deposits to the GRF had not reached the required threshold. SB 617 (2020) was passed which allows direct appropriations to the fund and special distributions for FY '20. As shown in the previous chart, over \$201 million was deposited into the Revenue Stabilization Fund to ensure FY '20 did not experience a revenue failure. The Revenue Stabilization Fund was used so that funds would be more accessible, but any monies not needed to avoid a revenue failure would still be in a reserve fund.

### History of Revenue Stabilization Fund



## OK BUDGET: REVENUE & APPROPRIATIONS

### FY '22 Appropriations by Subcommittees



#### All Funds Appropriations

Subcommittees	FY '21 <sup>^</sup>	FY '22	% Change
Education	\$3,953,211,053	\$4,165,614,219	5.4%
Gen. Gov. & Transportation	\$842,115,842	\$1,005,808,701	19.4%
Human Services	\$844,317,829	\$849,821,728	0.7%
Health & Social Services	\$1,543,540,021	\$1,761,300,769	14.1%
Natural Resources & Reg. Serv.	\$173,336,448	\$157,248,036	-9.3%
Public Safety & Judiciary	\$848,984,317	\$891,232,291	5.0%
Other	\$124,592,470	\$0	-100.0%
<b>Total</b>	<b>\$8,330,097,980</b>	<b>\$8,831,025,744</b>	<b>6.0%</b>

<sup>^</sup> FY '21 appropriations include supplementals and the revenue failure in the State Judicial Fund. Items included in Other are the Ad Valorem supplemental of \$109,000,000, the deposit of \$4,092,470 into the FMAP Rate Preservation Fund, and \$11,500,000 for the Multiple Injury Trust Fund (\$1,000,000 from the 2020 session and \$10,500,000 from the 2021 Session.) All remaining one-time/unique funding needs (Maintenance of State Buildings Fund, Quick Action Closing Fund, State Emergency Fund, etc.) are incorporated into the subcommittee for which the agency handling funds are reviewed.

For a full breakdown of FY '22 appropriations, please see the FY'22 Appropriations Report.

## OK BUDGET: REVENUE & APPROPRIATIONS

### 10-Year History of Appropriations

Org. Appropriation\* from FY 2013 through 2022 (in millions)

Fiscal Year	Common Ed	Higher Ed	OHCA
2022	\$3,164.4	\$812.8	\$1,194.3
2021	\$2,992.7	\$770.4	\$1,000.0
2020	\$3,071.0	\$802.1	\$1,000.0
2019	\$2,913.0	\$776.7	\$1,132.5
2018	\$2,432.2	\$768.9	\$1,018.7
2017	\$2,426.7	\$810.0	\$991.1
2016	\$2,484.9	\$963.4	\$971.1
2015	\$2,484.9	\$987.5	\$905.4
2014	\$2,407.6	\$988.5	\$953.7
2013	\$2,330.6	\$955.3	\$925.1
<b>Percentage of Total</b>			
2022	35.8%	9.2%	13.5%
2021	36.9%	9.5%	12.3%
2020	35.1%	9.2%	11.4%
2019	35.8%	9.5%	13.9%
2018	32.9%	10.4%	13.8%
2017	33.3%	11.1%	13.6%
2016	32.7%	12.7%	12.8%
2015	33.0%	13.1%	12.0%
2014	32.2%	13.2%	12.8%
2013	32.7%	13.4%	13.0%

\* Appropriations figures used are original appropriations therefore no supplementals are included neither are revenue failures accounted for. These figures best represent the intent of the legislature after proceeding through the normal appropriations process.



## OK BUDGET: REVENUE & APPROPRIATIONS

### 10-Year History of Appropriations (cont.)

Top Five Comparison with all other current year appropriations

ODOT*	DHS	All Other**	Total
\$761.9	\$717.6	\$2,180.0	\$8,831.0
\$565.0	\$713.8	\$2,064.6	\$8,106.6
\$743.9	\$741.4	\$2,388.3	\$8,746.7
\$740.9	\$729.4	\$1,841.5	\$8,133.9
\$725.7	\$695.3	\$1,747.8	\$7,388.5
\$666.9	\$651.5	\$1,752.0	\$7,298.2
\$637.2	\$678.9	\$1,874.8	\$7,610.3
\$609.0	\$674.9	\$1,865.1	\$7,526.7
\$560.8	\$631.0	\$1,924.2	\$7,465.8
\$498.8	\$587.0	\$1,821.2	\$7,117.9
Percentage of Total			
8.6%	8.1%	24.7%	100.0%
7.0%	8.8%	25.5%	100.0%
8.5%	8.5%	27.3%	100.0%
9.1%	9.0%	22.6%	100.0%
9.8%	9.4%	23.7%	100.0%
9.1%	8.9%	24.0%	100.0%
8.4%	8.9%	24.6%	100.0%
8.1%	9.0%	24.8%	100.0%
7.5%	8.5%	25.8%	100.0%
7.0%	8.2%	25.6%	100.0%

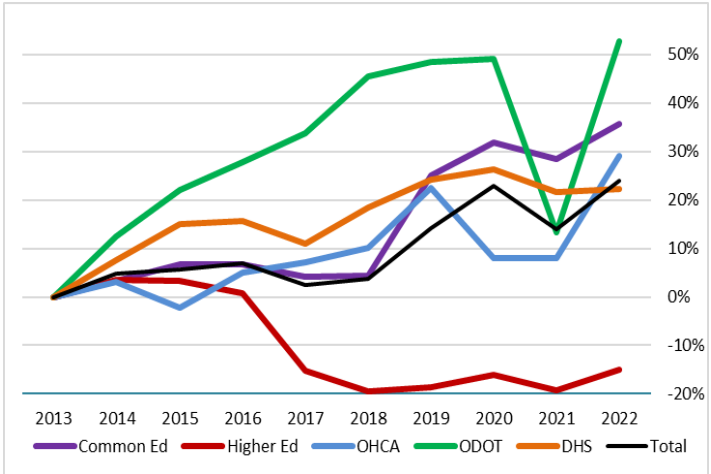
\*Beginning with FY '22, the ROADS Fund became an appropriated fund. To keep comparisons accurate, apportionments to the ROADS fund in previous fiscal years have been added to ODOT's appropriations.

\*\* All other includes the remaining appropriated state agencies along with any other appropriations attributed to that fiscal year. Total represents the total amount authorized by the legislature for that fiscal year, which means no supplementals are included.

## OK BUDGET: REVENUE & APPROPRIATIONS

### Top Five 10-Year Appropriations Trend Comparison

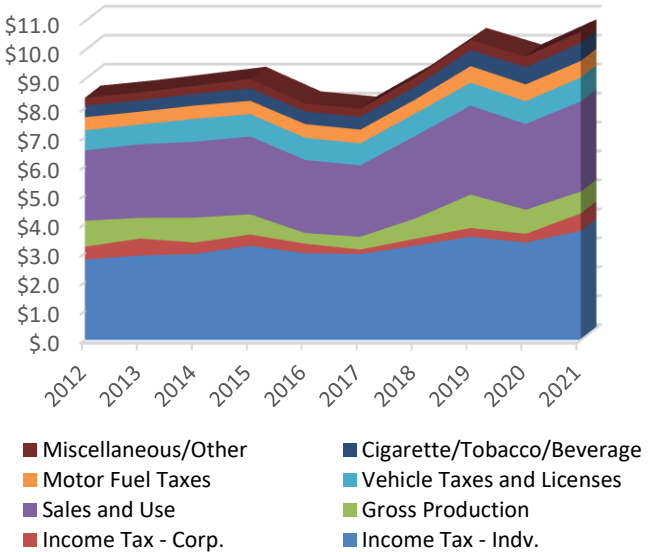
Orig. Appr. as Cumulative Percentage Change over FY 2013



- The top five agency experiencing the largest percentage growth in the past ten years has been ODOT (52.7%). This growth is directly attributed to required increasing apportionments to the ROADS fund to reach the \$575 million cap. The significant drop in FY '21 is due to diverging \$180 million to the 1017 fund.
- The next largest percentage growth and easily the largest by dollar amount (\$833.8 million) is for SDE or Common Ed. Much of the growth is attributed to the teacher pay raises, and increase in classroom funding in recent fiscal years, but also to constantly increasing costs for flexible health benefits.
- OHCA's recent spike above Total growth is due to funding of Medicaid expansion and growth.
- The only top five agency to experience a loss since 2013 is the State Regents or Higher Ed.
- Other agencies which experienced strong cumulative percentage growth since 2013 include OMES (156.1%), Emergency Management (280.4%), UHA (108%), OSU Medical Authority (1,109.5%), and the Office of Chief Medical Examiner (166.2%).

## OK BUDGET: REVENUE & APPROPRIATIONS

### Major State Tax Collections FY 2012-FY 2021 (in Billions)



Source: OTC Annual Reports

Over the ten-year period of FY 2012 to 2021, state tax collections grew by about \$2.92 billion or 27.4%, from \$8.363 billion to \$10.656 billion. However, when adjusted for inflation, the growth would only be \$651,722,919, or 7.8%.

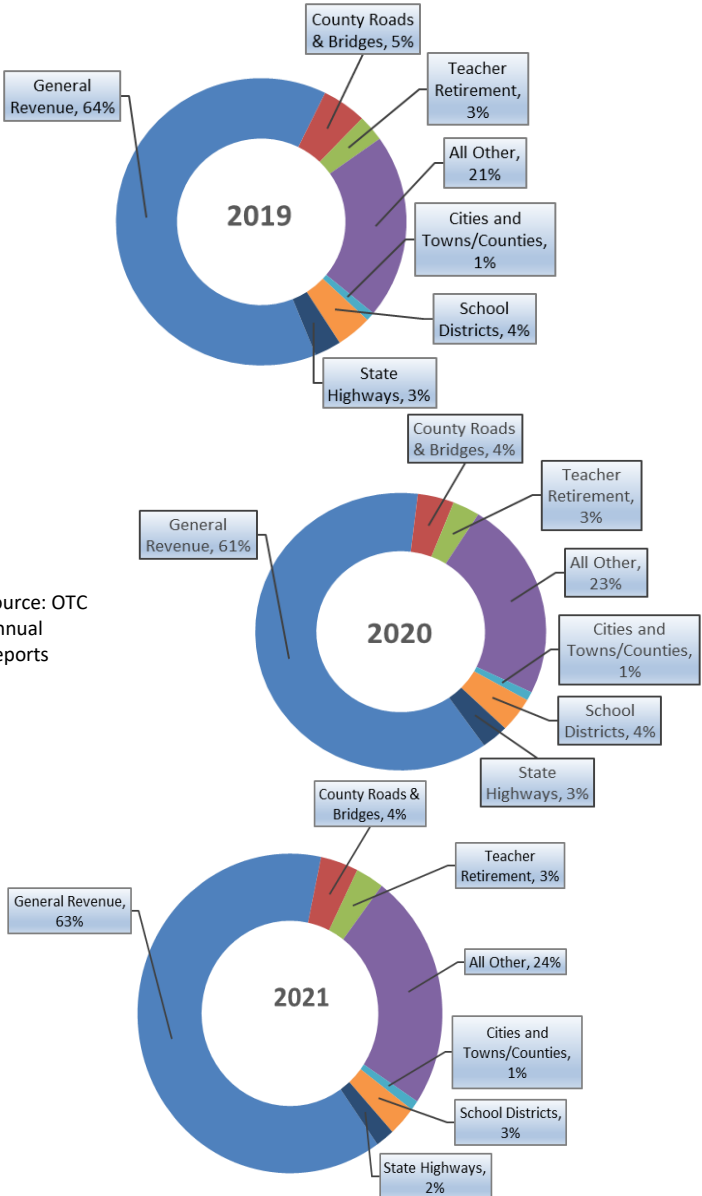
Most of the growth has been in recent fiscal years due to the various tax increases and changes enacted during the 2018 session. However, a dip did occur during FY '20 due to the pandemic.

The major state tax collection with the highest percent change (54.45%) is the Cigarette/Tobacco/Beverage which grew from \$395.2 to \$610.5 billion. Most of that growth is due to the \$1 per pack tax increase.

Gross production tax collections experienced a negative percent change (-15.88%) but is also one of the most volatile revenue sources.

# OK BUDGET: REVENUE & APPROPRIATIONS

## How Taxes were Allocated



Source: OTC Annual Reports

## OK BUDGET: REVENUE & APPROPRIATIONS

### Individual Income Tax

Before tax year 2022, OK's graduated income tax rate was based on a bracket structure which ranged from ½% to 5%; however, after passage of HB 2962(2021), all brackets were cut by 0.25%.

	Before <u>Tax Yr 2022</u>	Tax Yr <u>2022</u> ➔
First \$1,000(single)/\$2,000(joint)	0.5%	0.25%
On the next \$1,500/\$3,000:	1%	0.75%
On the next \$1,250/\$2,500:	2%	1.75%
On the next \$1,150/\$2,300:	3%	2.75%
On the next \$2,300/\$2,400:	4%	3.75%
On the remainder:	5%	4.75%

OK's bracket structure is fairly compressed with single filers reaching the top bracket at \$7,200 and \$12,200 for joint filers.

HB 1011XX (2017) capped itemized deductions for an OK taxpayer at \$17,000, excluding medical expenses and charitable donations.

Individual income tax revenues are apportioned by the OTC on a monthly basis according to the following statutory schedule:

- 85.66% to the General Revenue Fund
- 8.34% to the Education Reform Fund (1017 Fund)
- 5.00% to the TRS Dedicated Revenue Revolving Fund
- 1.00% to the Ad Valorem Reimbursement Fund (This

fund reimburses local governments for lost revenues related to the constitutional exemption for manufacturing facilities.)

However, HB 2741 (2020) and HB 2894 (2021) temporarily adjusted the apportionment through FY 2027:

#### FY 2021

GR	85.66%
1017 Fund	8.34% July-August 9.84% September - June
TRS	5.00% July-August 3.50% September - June
Ad Val Reimb.	1.00%

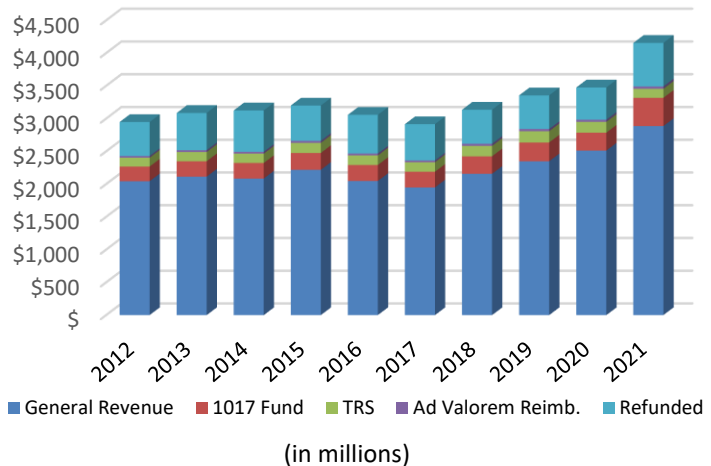
## OK BUDGET: REVENUE & APPROPRIATIONS

<u>FY 2022</u>		<u>FY 2023-2027</u>	
GR	85.66%	GR	85.41%
1017 Fund	8.34%	1017 Fund	8.34%
TRS	5.00%	TRS	5.25%
Ad Val Reimb.	1.00%	Ad Val Reimb.	1.00%

The purpose of the adjusted apportionment was to reduce a revenue loss in the 1017 fund during FY '21 by temporarily redirecting funds from TRS. However, TRS will be repaid by the temporary increase in apportionment from FY 2023-2027.

The following graph shows the past ten years collections of individual income taxes that were apportioned after any “off the top” deposits and excluding any rebates or transfers.

**Individual Income Taxes FY 2012-2021**



Source: OTC Annual Reports

Items not included in the above graph include things such as the OK Film Enhancement Rebate Program and transfers for the Quality Jobs Incentive payments. The largest portion is for the ROADS program, although starting in FY 2020, new motor fuel taxes and changes to the apportionment of motor vehicle taxes and fees now fund most of the ROADS apportionment.

## OK BUDGET: REVENUE & APPROPRIATIONS

### Total "Off the Top" from Individual Income Taxes (in millions)

FY 2012	\$359.5	FY 2017	\$609.6
FY 2013	\$408.9	FY 2018	\$653.7
FY 2014	\$477.3	FY 2019	\$728.9
FY 2015	\$605.7	FY 2020	\$386.8
FY 2016	\$541.3	FY 2021	\$283.5

### Individual Income Taxes

2021 Rates; 2018 per Capita Revenue and Rankings

State	Tax Rate	Per Capita Revenue	Ranking
Colorado	4.55%	\$1,319	13
Nebraska	2.46 - 6.84%	\$1,224	19
Kansas	3.1 - 5.7%	\$1,172	23
Missouri	1.5 - 5.4%	\$1,063	26
Arkansas	2 - 5.9%	\$951	31
<b>Oklahoma</b>	<b>0.5 - 5%</b>	<b>\$886</b>	<b>32</b>
Louisiana	2 - 6%	\$697	37
Arizona	2.59 - 8.0%	\$634	38
New Mexico	1.7 - 5.9%	\$598	40
Texas	--	--	--
U.S.		\$1,198	

Sources: State Rankings 2020, A Statistical View of America; Federation of Tax Administrators

- The average Oklahoman pays \$312 less per year in individual income taxes than the average American.
- In 2018, Connecticut had the highest per capita income tax collections with \$2,724 collected per person.
- Seven states- Alaska, Florida, Nevada, South Dakota, Texas, Washington, and Wyoming- do not levy an individual income tax.

## OK BUDGET: REVENUE & APPROPRIATIONS

### Corporate Income Tax

Corporate income tax was imposed at a flat 6% rate on OK taxable income; however HB 2960, 2961, and 2963 (2021) reduced the rate to 4% beginning with tax year 2022. Due to the volatility of this revenue source, it is one of the funds affected by the Revenue Stabilization Fund. Volatility in collections is in part due to businesses reacting to federal tax code or changing their organizational structure. Corporate income tax revenues are apportioned monthly:

- 77.5% to the General Revenue Fund\*
- 16.5% to the Education Reform Fund (1017 Fund)
- 5.00% to the TRS Dedicated Revenue Revolving Fund
- 1.00% to the Ad Valorem Reimbursement Fund

\* The apportionment to the GR fund is subject to the provisions of the Revenue Stabilization Fund.

However, HB 2741 (2020) and HB 2894 (2021) temporarily adjusted the apportionment through FY 2027:

#### FY 2021

GR	77.5%
1017 Fund	16.5% July-August 18.0% September - June
TRS	5.0% July-August 3.5% September - June
Ad Val Reimb.	1.00%

#### FY 2022

GR	77.5%
1017 Fund	16.5%
TRS	5.0%
Ad Val Reimb.	1.0%

#### FY 2023-2027

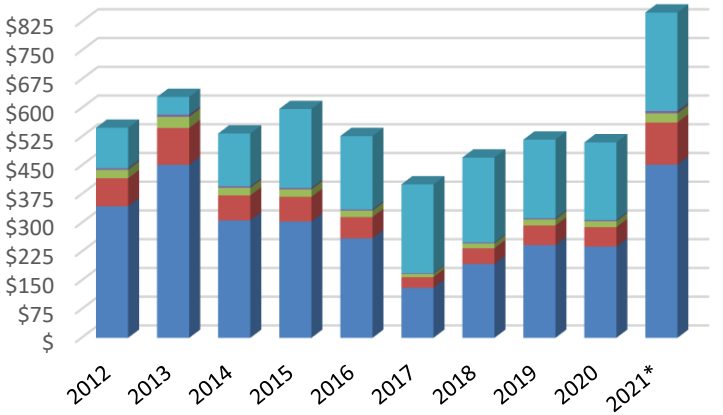
GR	77.25%
1017 Fund	16.5%
TRS	5.25%
Ad Val Reimb.	1.0%

The purpose of the adjusted apportionment was to prevent a revenue loss in the 1017 fund during FY '21 by temporarily redirecting funds from TRS. However, TRS will be repaid by the temporary increase in apportionment from FY 2023-2027.



## OK BUDGET: REVENUE & APPROPRIATIONS

### Corporate Income Tax FY 2012-2021 (in millions)



■ General Revenue ■ 1017 Fund ■ TRS ■ Ad Valorem Reimb. ■ Refunded

Source: OTC Annual Reports

\* FY '21 apportionments included \$29,972,330 to the Constitutional Reserve Fund not included in the total above.

### Corporate Income Taxes

2021 Rates; 2018 per Capita Revenue and Rankings

State	Tax Rate	Per Capita Revenue	Ranking
Nebraska	5.58 - 7.81%	\$163	17
Kansas	4%	\$150	19
Arkansas	1 - 6.2%	\$130	25
Colorado	4.55%	\$116	28
Louisiana	4 - 8%	\$77	38
<b>Oklahoma</b>	<b>6%</b>	<b>\$60</b>	<b>41</b>
Missouri	4%	\$54	42
Arizona	4.9%	\$52	43
New Mexico	4.8 - 5.9%	\$44	44
Texas	--	--	--
U.S.		\$147	

Sources: State Rankings 2020; Federation of Tax Administrators

- Oklahoma ranks 41<sup>st</sup> out of 46 states that levy such tax, and 4<sup>th</sup> lowest in the region.

## OK BUDGET: REVENUE & APPROPRIATIONS

### Gross Production Tax

There are two types of gross production taxes: the severance tax and the petroleum excise tax. A severance tax is a tax levied upon the production or mining of minerals when they are “severed” from the earth. Severance tax rates on oil and gas are as follows:

- 5% incentive rate for the first three years of production
- 7% thereafter is the standard levy

A petroleum excise tax is levied on oil and gas at a rate of 0.095 of 1% of gross value through FY 2021, then the rate drops to 0.085 of 1% of gross value.

Apportionment of gross production taxes is somewhat complex. Severance tax on oil, at the standard 7% rate:

*25.72% to the Common Education Technology Fund*

*25.72% to the Higher Education Capital Fund*

*25.72% to the Oklahoma Tuition Scholarship Fund*

*7.14% to counties where the oil is produced, for roads*

*7.14% to school districts*

*3.745% to the County Bridge and Road Improv. Fund*

*0.535% to the Statewide Circuit Engineering District  
Revolving Fund*

*4.28% to three funds: the OK Tourism and Recreation Capital Expenditure Revolving Fund, the OK Conservation Commission Infrastructure Revolving Fund, and the Community Water Infrastructure Development Revolving Fund. Each fund will receive one third of the apportionment through FY '22 and then the apportionment will revert back to the REAP (Rural Economic Action Plan) Water Projects Fund.*

Severance tax on oil, at the 5% incentive rate:

*23.75% to the Common Education Technology Fund*

*23.75% to the Higher Education Capital Fund*

*23.75% to the Oklahoma Tuition Scholarship Fund*

*10.00% to counties where the oil is produced, for roads*

*10.00% to school districts*

*3.28% to the County Bridge and Road Improv. Fund*

*0.47% to the Statewide Circuit Engineering District  
Revolving Fund*

## OK BUDGET: REVENUE & APPROPRIATIONS

5.00% to three funds: the *OK Tourism and Recreation Capital Expenditure Revolving Fund*, the *OK Conservation Commission Infrastructure Revolving Fund*, and the *Community Water Infrastructure Development Revolving Fund*. Each fund will receive one third of the apportionment through FY '22 and then the apportionment will revert back to the REAP (Rural Economic Action Plan) Water Projects Fund.

All funds which were italicized are restricted to a total annual amount apportioned of \$150 million. Any excess is deposited into the General Revenue Fund.

Severance tax on other minerals and gas at the 7% rate:

85.72% to the General Revenue Fund

7.14% to the counties where the gas or mineral is produced, for roads

7.14% to school districts

Severance tax on gas at the 5% incentive rate:

80% to the General Revenue Fund

10% to the counties the gas is produced, for roads

10% to school districts

Until FY 2022, petroleum excise tax revenues are apportioned monthly as follows:

<u>Oil</u>	<u>Gas</u>
82.634% to the GR Fund*	82.6045% to the GR Fund*
10.526% to the Corporation Commission Plugging Fund	10.5555% to the Corporation Commission Plugging Fund
6.84% to the Interstate Oil Compact Fund	6.84% to the Interstate Oil Compact Fund

Beginning FY 2022, petroleum excise tax revenues from oil and gas will be apportioned monthly as follows:

92.35% to the General Revenue Fund\*

7.65% to the Interstate Oil Compact Fund

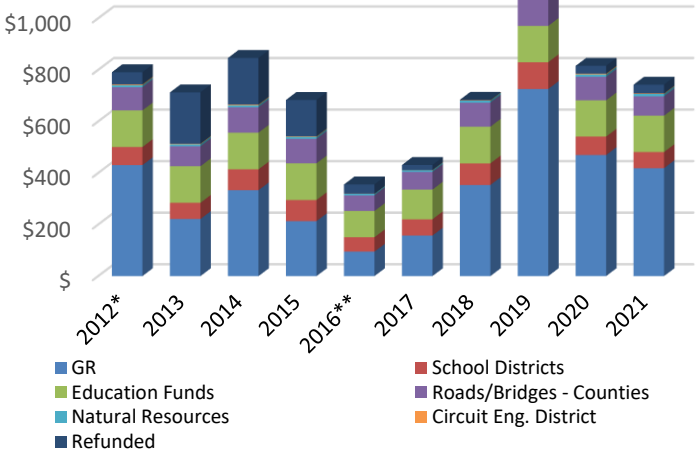
\* The first \$2.7 million is transferred to the Corporation Commission.

# OK BUDGET: REVENUE & APPROPRIATIONS

## Gross Production Tax Collections, FY 2012-2021

The following graphs show the total gross production tax collections and apportionments for the past ten years.

### Severance Tax (in millions)

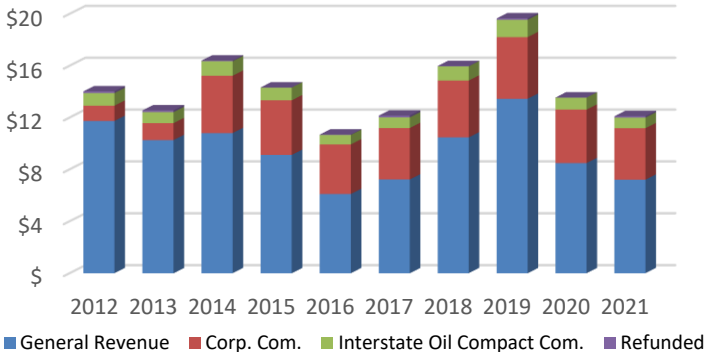


Source: OTC Annual Reports

\* FY 2012 had an additional \$92,591,406 in special distributions: SDE Disbursing Fund - \$52,445,700; State Emergency Fund - \$34,145,706; DPS Patrol Academy - \$5,000,000; Chief Medical Examiner - \$1,000,000.

\*\* FY 2016 had an additional \$1,200,656 in funds held in litigation or for other disposition.

### Petroleum Excise Tax



Source: OTC Annual Reports

# OK BUDGET: REVENUE & APPROPRIATIONS

## State Sales and Use Tax

The state rate for both the sales tax and use tax in Oklahoma is 4.5%. Municipalities and counties may also levy sales taxes. There is no limit on the amount a municipality may levy, although voter approval is required. Counties may levy up to 2%. Use tax is paid by the buyer for items purchased to be used in OK when the seller has not collected OK sales tax.

Apportionment of sales and use tax are as follows:

- 83.61% to the General Revenue Fund
- 10.46% to the Education Reform Fund (1017 Fund)
- 5.00% to the TRS Dedicated Revenue Revolving Fund
- 0.87%\* divided between two tourism funds (36% to

the OK Tourism Promotion Revolving Fund capped at \$5 million annually and 64% to the OK Tourism Capital Improvement Revolving Fund capped at \$9 million annually.)

0.06%\* to the OK Historical Society Capital Improvement and Operations Revolving Fund, capped at the amount apportioned in FY '15- \$1,595,952.

*\* Any amounts which accrue in excess of the caps are deposited into the General Revenue Fund. Caps were not active until FY 2016.*

However, HB 2741 (2020) and HB 2894 (2021) temporarily adjusted the apportionment through FY 2027:

### FY 2021

GR	83.61%
1017 Fund	10.46% July-August 11.96% September - June
TRS	5.00% July-August 3.50% September - June
Tourism/Hist.	0.93%

### FY 2022

GR	83.61%
1017 Fund	10.46%
TRS	5.0%
Tourism/Hist.	0.93%

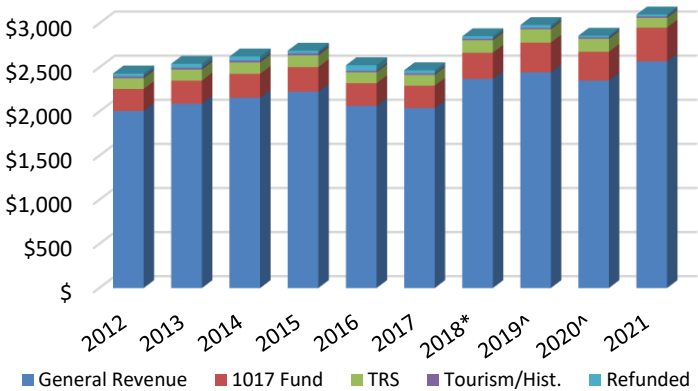
### FY 2023-2027

GR	83.36%
1017 Fund	10.46%
TRS	5.25%
Tourism/Hist.	0.93%

## OK BUDGET: REVENUE & APPROPRIATIONS

Additionally, prior to apportionment of sales tax revenue, revenue first is used to reimburse municipalities for losses resulting from the state Sales Tax Holiday. Use tax has an “off the top” apportionment of \$20.5 million to the 1017 Fund.

### Sales and Use Tax FY 2012-2021 (in millions)



Source: OTC Annual Reports

\*Beginning in FY 2018, sales tax collections from motor vehicles sales/transfers are included in totals, except for the portion paid to tribes.

^A portion of sales tax collections were used to pay the ROADS fund: FY 2019 the amount was \$92 million, and FY 2020 was \$99.6 million. Those amounts were “borrowed” from the ROADS fund to fully fund the education portion of the Ad Valorem Reimbursement fund.

### 2021 Rates; 2018 per Capita Revenue and Rankings

State	State Only Tax Rate	Tax Rate Ranking	State & Local Per Cap Rev	Revenue Ranking
Arkansas	6.5%	9	\$1,511	8
Kansas	6.5%	9	\$1,477	9
Texas	6.25%	13	\$1,426	11
Arizona	5.6%	29	\$1,371	13
Nebraska	5.5%	30	\$1,167	21
New Mexico	5.125%	33	\$1,604	6
<b>Oklahoma</b>	<b>4.5%</b>	<b>37</b>	<b>\$1,185</b>	<b>18</b>
Louisiana	4.45%	39	\$1,851	3
Missouri	4.225%	40	\$1,048	30
Colorado	2.9%	46	\$1,339	14
U.S.			\$1,196	

Sources: State Rankings 2020; Federation of Tax Administrators

## OK BUDGET: REVENUE & APPROPRIATIONS

### Motor Vehicle Taxes and Licenses

Oklahoma has two main taxes for motor vehicles: the annual fee for registration and an excise tax upon the transfer of title or possession. Although all motor vehicles are subject to the registration and tax requirements, the following chart is only for standard, noncommercial vehicles.

#### Excise Tax (Standard Vehicle)

New	3.25% of actual sales price
Used	\$20 on the first \$1,500, 3.25% on the remainder (Value must be within 20% of average retail value for that specific model vehicle. If the purchase price provided is not within that 20% range, a taxable value within that range is established for excise tax assessment purposes.)

#### Registration Fees (Noncommercial)

<u>Age of Vehicle</u>	<u>Fee (all inclusive)</u>
1 - 4 years	\$96
5 - 8 years	\$86
9 - 12 years	\$66
13 - 16 years	\$46
17+ years	\$26

Beginning in FY 2018, certain motor vehicle transfers became subject to 1.25% of the state sales tax, when previously such transactions were exempt. Those collection amounts are included under the Sales and Use tax totals.

Apportionment of motor vehicle taxes and licenses have been modified in recent legislation so that most recipients have a revenue limit. Beginning with FY 2020, any amounts that had been deposited in the General Revenue Fund are now directed to the ROADS Fund, reducing the amount needed from income tax revenue to fund the ROADS apportionment. Once the ROADS Fund reaches its cap of \$575 million, then excess monies would go to the General Revenue fund.

## OK BUDGET: REVENUE & APPROPRIATIONS

Motor vehicle taxes and fees are apportioned monthly as follows:

36.20%	to school districts*, capped at \$261,404,061
24.84%	originally to the GR Fund, now ROADS
20.00%	to the County Improvement for Roads and Bridges (CIRB) Fund*, capped at \$120 million
7.24%	to counties for roads*, capped at \$52,276,851
3.62%	to the County Road Improvement Fund*, capped at \$26,138,426
3.10%	to cities and towns*, capped at \$22,383,735
2.59%	to the County Road Fund*, capped at \$18,701,249
1.24%	to the OK Law Enforcement Retirement Fund
0.83%	to county general funds*, capped at \$5,993,064
0.31%	to the State Transportation Fund*, capped at \$2,141,070
0.034%	to the Wildlife Conservation Fund

\* Any amounts which accrue in excess of the caps are now deposited into the ROADS Fund. Caps were not active until FY 2016.

In recent years, the apportionment to the CIRB fund has been adjusted. For FY '21, SB 1888 (2020) set aside 35% or \$42 million which was distributed directly to counties to be put into their county highway fund to be used for maintenance and operations. Allocation for each county was determined by the following formula:

- (1/3) on area
- (1/3) on rural population
- (1/3) on county road mileage, as last certified by ODOT.

However, HB 2892 (2021) permanently created a set aside of 25% or \$30 million to be allocated directly to counties. For FY '22 through '26, the allocation formula will be:

- (1/3) based on proportion of area
- (1/3) on proportional share of county road miles
- (1/3) based on the proportion of the total replacement cost for obsolete or deficient bridges according to the most recent ODOT yearly Bridge Summary Report for County Bridges.

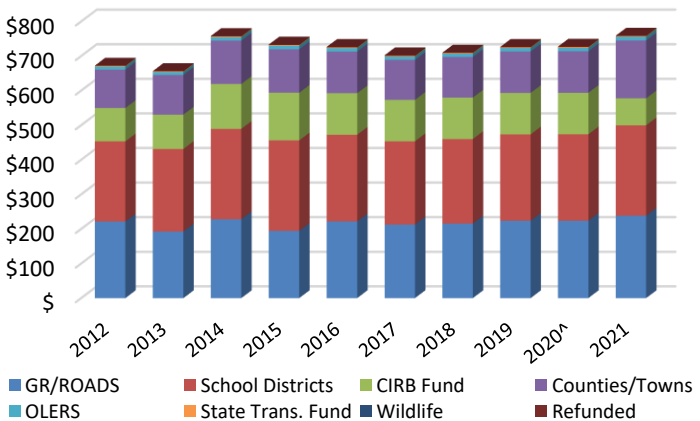


## OK BUDGET: REVENUE & APPROPRIATIONS

For FY '27 and on, the final (1/3) of the formula will be based on the proportion of the number of county bridges in each county according to the ODOT 2020 Bridge Summary Report for County Bridges.

The following graph shows the distribution of motor vehicle taxes for the past ten years. Due to the previously mentioned \$42 million for FY '21 originally intended for the CIRB fund being directly deposited with counties, the amount of funds apportioned to the CIRB fund for FY '21 is \$78 million.

**Motor Vehicle Taxes FY 2012-2021**  
(in millions)



Source: OTC Annual Reports

<sup>^</sup> FY 2020 is the first year that funds were deposited into the ROADS fund instead of the General Revenue Fund.

### Motor Fuel Taxes

The two major excise fuel taxes levied are on gasoline and diesel fuel. Due to a court ruling related to sales in Indian country, the point of taxation for motor fuels is the terminal rack. Consequently, certain tribes entered into agreements with the state on fuel tax issues so that an apportionment of fuel tax revenue goes to the tribes along with the distributions as outlined later.

## OK BUDGET: REVENUE & APPROPRIATIONS

### Motor Fuel Tax Apportionment to Tribes

FY 2012	\$18,406,285	FY 2017	\$19,359,986
FY 2013	\$18,078,706	FY 2018	\$19,782,031
FY 2014	\$18,817,131	FY 2019	\$23,742,613
FY 2015	\$18,996,354	FY 2020	\$24,061,499
FY 2016	\$19,397,289	FY 2021	\$22,825,528

Both gasoline and diesel are taxed at \$0.20 per gallon. \$0.01 from each of those assessments are mostly sent to the Petroleum Storage Tank Indemnity Fund which is used for the removal and/or replacement of leaking underground storage tanks, with excess amounts being used for various road and transportation needs. Certain amounts are also sent to the Corporation Commission, DEQ and the Weigh Station Improvement revolving fund. The average amount collected for the past 10 fiscal years from that assessment is \$33,406,977. The distribution of the remaining \$0.19 for each tax is slightly different.

### Gasoline Tax

From the \$0.19 in tax revenue, \$0.16 is distributed as follows\*:

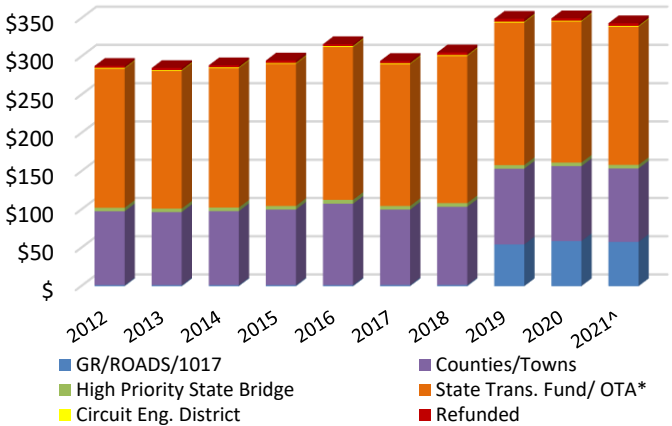
- 63.75% to the State Transportation Fund
- 27.0% to the counties for roads and highways
- 3.125% to the counties for the purposes provided in the County Bridge and Road Improvement Act
- 2.297% to the County Bridge and Road Improvement Fund
- 1.875% to cities and towns for street maintenance
- 1.625% to the High Priority State Bridge Revolving Fund
- 0.328% to the Statewide Circuit Engineering District Revolving Fund

\*The first \$250,000 collected each month goes to the credit of the State Transportation Fund prior to apportionment.

The final \$0.03, levied by 1010XX (2017), was distributed to the General Revenue Fund for FY 2019, and is now deposited in the ROADS Fund. However, for only FY '21, \$51,550,864 from this levy was redirected to the 1017 fund for education.

## OK BUDGET: REVENUE & APPROPRIATIONS

**Gasoline Tax Collections FY 2012-2021**  
(in millions)



Source: OTC Annual Reports

\* OTA is the OK Turnpike Authority which works with ODOT.

^Collections were redirected to the 1017 fund only during FY '21.

### Diesel Fuel Tax

From the \$0.19 in tax revenue, \$0.13 is distributed as follows^:

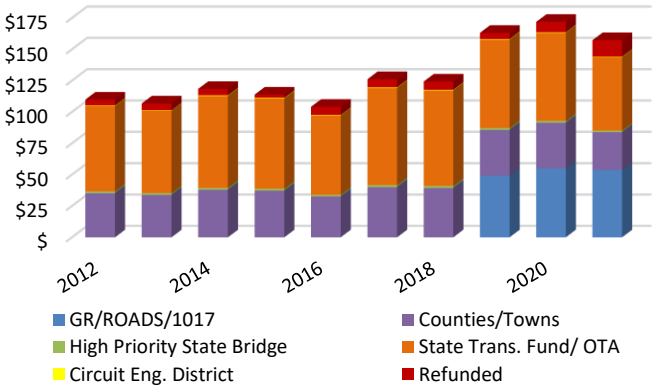
- 64.34% to the State Transportation Fund
- 26.58% to the counties for roads and highways
- 3.36% to the counties for the purposes provided in the County Bridge and Road Improvement Act
- 3.84% to the County Bridge and Road Improvement Fund
- 1.39% to the High Priority State Bridge Revolving Fund
- 0.488% to the Statewide Circuit Engineering District Revolving Fund

^The first \$83,333 collected each month goes to the credit of the State Transportation Fund prior to apportionment.

The final \$0.06, levied by 1010XX (2017), was distributed to the General Revenue Fund for FY 2019, and is now deposited in the ROADS Fund. However, for only FY '21, \$49,374,627 from this levy was directed to the 1017 fund for education.

## OK BUDGET: REVENUE & APPROPRIATIONS

### Diesel Fuel Tax Collections FY 2012-2021 (in millions)



Source: OTC Annual Reports

^Collections were redirected to the 1017 fund only during FY '21.

One amount not included in the 2021 total above is \$17,565,877 sent to the Corporation Commission to comply with the International Fuel Tax Agreement (IFTA). IFTA is an agreement between the lower 48 states and the Canadian provinces to simplify the reporting of fuel use by motor carriers that operate in more than one jurisdiction.

### Motor Fuel Tax Rates 2020 Rates and Rankings

State	Gasoline Tax Rate	Ranking	Diesel Tax Rate	Ranking
Nebraska	29.6¢	22	29.0¢	24
Arkansas	24.8¢	32	28.8¢	25
Kansas	24.03¢	35	26.03¢	33
Colorado	22.0¢	41	20.5¢	43
Louisiana	20.125¢	43	20.125¢	45
Oklahoma	20.0¢	44	20.0¢	46
Texas	20.0¢	44	20.0¢	46
Arizona	19.0¢	46	27.0¢	30
New Mexico	18.875¢	47	22.875¢	40
Missouri	17.42¢	49	17.42¢	49
U.S.	18.4¢		24.4¢	

Source: 2021 web page of Federation of Tax Administrators ([www.taxadmin.org](http://www.taxadmin.org))

## OK BUDGET: REVENUE & APPROPRIATIONS

### Alcohol Taxes

Alcohol taxes were most recently overhauled due to the passage of State Question 792 which became effective October 1, 2018. Besides adjusting the tax structure, other major changes are beer and wine may be sold in grocery and convenience stores, and liquor stores are permitted to sell refrigerated products. Alcohol taxes can be divided into two main categories: the “Alcoholic Beverages” taxes, and the “Mixed Beverage” tax.

#### Alcoholic Beverages Taxes

Taxes are paid by the first licensee in the state who imports or handles the beverages and is passed on to, and levied upon, the ultimate consumer. Tax rates are as follows:

All Spirits	\$1.47 per liter
Wine	\$0.19 per liter
Sparkling Wine	\$0.55 per liter
Beer	\$12.50 per 31-gallon barrel

Revenue from those taxes is apportioned as follow:

2/3 <sup>rd</sup> of 97%	to the General Revenue Fund (except for up to \$350,000 collected annually from the sale of wine and sparkling wine which is deposited into the OK Viticulture and Enology Center Development Revolving Fund.)
1/3 <sup>rd</sup> of 97%	to counties based on area and population.
3%	to the Tax Commission Revolving Fund

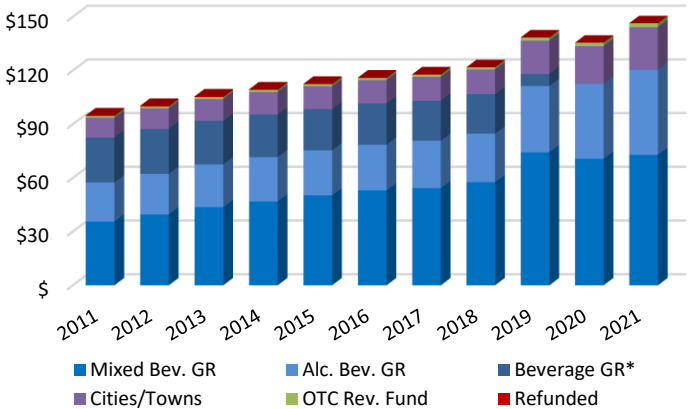
#### Mixed Beverage Tax

Any beverage sold by the individual drink for on-premises consumption is subject to an excise tax of 13.5%, levied on the license-holder serving the drink. All revenue from the mixed beverage tax is apportioned to the General Revenue Fund.

The mixed beverage tax was first levied in 1985, the year after OK voters approved the sale of liquor by the drink.

## OK BUDGET: REVENUE & APPROPRIATIONS

**Alcohol Tax Collections FY 2012-2021**  
(in millions)



Source: OTC Annual Reports

\* Tax levied on 3.2% beer or less: \$11.25 per 31-gallon barrel, prior to 10/1/2018.

### Cigarette and Tobacco Taxes

Cigarettes and tobacco taxes were also affected by the major tax changes from the second special session of 2017, most notably the tax on cigarettes. Cigarettes are taxed at \$2.03 per 20-cigarette pack and revenues are distributed as follows:

- \$0.23 on each pack is used to repay state bonds
- The next \$0.80 is split five ways-
  - 65.87% is apportioned to eight health related funds
  - 16.83% to the General Revenue Fund
  - 14.23% to counties and cities
  - 2.07% to the 1017 Fund
  - 1% to the Teachers' Retirement System
- \$1.00 was distributed to the GR Fund for FY 2019 but is now deposited into the Health Care Enhancement Fund.

The final \$1.00 per pack tax on cigarettes is the result of HB 1010xx (2017).

## OK BUDGET: REVENUE & APPROPRIATIONS

Tobacco products are taxed separately from cigarettes. Tax rates depend upon the size of the cigar or the type of tobacco.

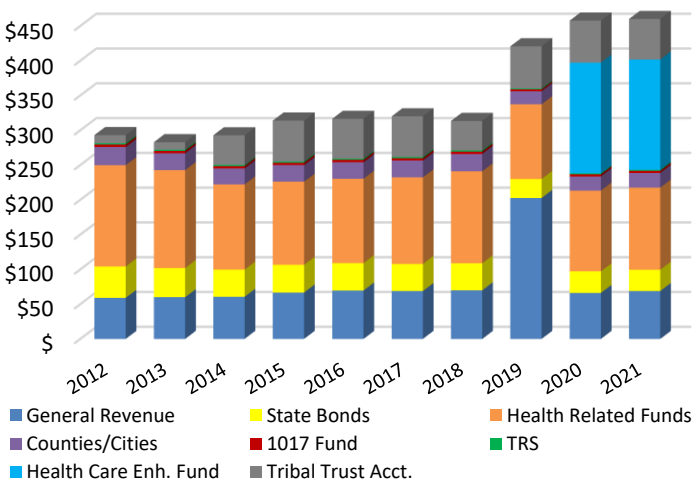
Tax rates on various tobacco products are as follows:

Large Cigars	\$0.12 each
Little Cigars	taxed exactly like cigarettes
Smoking Tobacco	80% of the factory list price
Chewing Tobacco	60% of the factory list price

Revenue generated by tobacco products is apportioned exactly as the “next \$0.80” for cigarettes, as outlined previously.

It is also important to note that some tax disparities exist between tribal and non-tribal sales, and that those rates are separate from the taxes outlined. However, revenue generated from State/Tribal Compact Stamps and Tribal cigarette/tobacco payments which are distributed like the “next \$0.80” are included in the totals of the following graph. Also included are payments to a tribal trust account.

**Cigarette and Tobacco Tax Collections FY 2012-2021**  
(in millions)



Source: OTC Annual Reports

## EDUCATION

### Education Subcommittee

The Education Subcommittee is comprised of eleven agencies:

- Oklahoma Arts Council
- State Department of Career and Technology Education (Career Tech)
- State Department of Education (Common Ed)
- Oklahoma Educational Television Authority (OETA)  
Oklahoma State Regents for Higher Education (Higher Ed)
- Commissioners of the Land Office (CLO)
- Oklahoma Department of Libraries
- Physician Manpower Training Commission (PMTC)
- Office of Educational Quality & Accountability (OEQA)
- Oklahoma School of Science and Mathematics (OSSM)
- Oklahoma Center for the Advancement of Science and Technology (OCAST)

### Education Subcommittee Total Appropriations

#### FY 2013 -2022

FY 2013	\$3,500,240,277
FY 2014	\$3,593,799,432
FY 2015	\$3,662,201,580
FY 2016	\$3,505,485,400
FY 2017	\$3,350,261,227
FY 2018	\$3,354,138,318
FY 2019	\$3,857,233,820
FY 2020	\$4,074,548,305
FY 2021	\$3,947,211,503
FY 2022	\$4,165,614,219

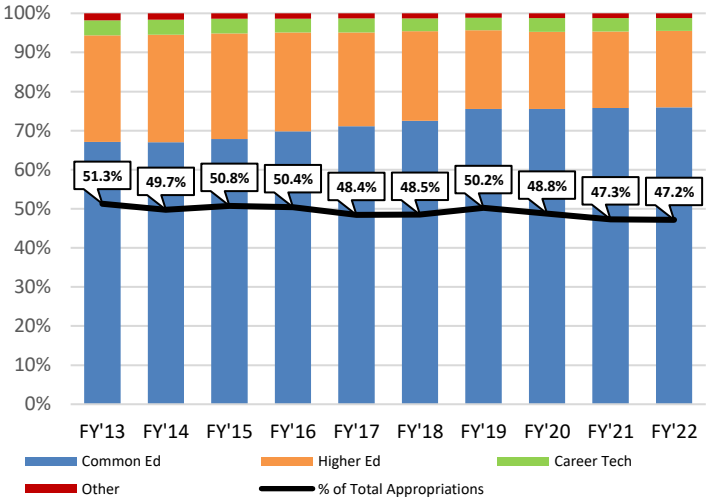
The appropriation figures include any supplementals and account for any revenue failures whether in general revenue appropriations or in dedicated sources.

The following graph shows what percent of the subcommittee's appropriation goes to specific agencies, along with what percent of total appropriations goes to the education subcommittee.



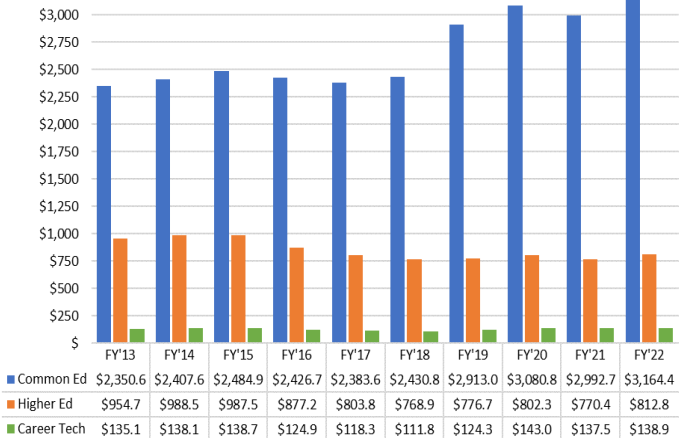
## EDUCATION

### Education Subcommittee FY 2013 – 2022



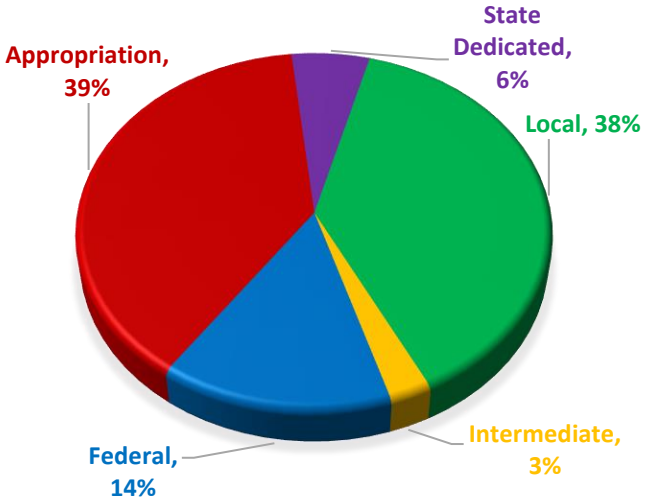
- Education contains three of the top 12 highest appropriated agencies.
- Common Education (PreK-12) accounted for 35.83% of appropriated dollars for FY '22.

### Top 3 Education Agencies Appropriations FY 2013 – 2022 (in Millions)



## EDUCATION

### Common Education Total Funding for Operations FY 2021



Source	FY 2020	FY 2021
Appropriation	\$3,080,775,369	\$2,992,729,814
State Dedicated	\$459,257,157	\$457,812,799
Local	\$2,882,747,247	\$2,982,023,297
Intermediate	\$186,079,305	\$203,324,139
Federal	\$765,874,014	\$1,124,645,820
<b>Total</b>	<b>\$7,374,733,092</b>	<b>\$7,760,535,869</b>

Sources: FY '20- OK Cost Accounting System (OCAS), FY '21- SDE  
 Totals do not include bond sinking funds.

Funding for Common Education is divided into five main categories:

**Appropriated** - Funds appropriated by the Legislature

**State Dedicated** - Funding sources established by law which include:

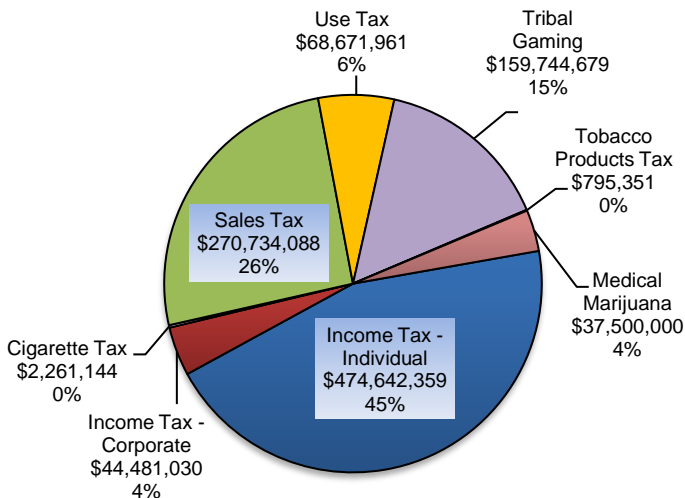
- Gross Production Tax
- Motor Vehicle Collections
- Rural Electrification Association Tax
- State School Land Earnings

## EDUCATION

- Local - Funds collected or taxes levied at the school district level, most notably Ad Valorem (property) taxes.
- Intermediate - Funds collected or taxes levied at the County level, also mostly Ad Valorem Taxes.
- Federal - Funds received from the federal gov.

Besides appropriations from the General Revenue fund, one of the main appropriations for common education is the Education Reform Revolving Fund, better known as the 1017 Fund (due to the fund being created by HB 1017 from 1990). The 1017 fund is made up of dedicated tax revenues and 88% of generated revenues from the State-Tribal Gaming Act.

**1017 Fund by Funding Category, FY 2022\***



\* To account for HB 2895, \$180,000,000 will be removed from the fund revenue bringing the total down to \$878,830,612.

As noted, most of local and intermediate revenue is from Ad Valorem or property tax collections. In Oklahoma, this tax is levied in mills (1 mill is 1/1000 of a dollar or .001) against real, personal and public service property. Ten mills equal one penny. Stated another way, a mill is a tax of \$1 dollar per \$1,000 dollars of property valuation subject to taxation.

## EDUCATION

There are seven different ad valorem tax levies that are used in Oklahoma for the support of common education at the local and intermediate level. The state Constitution provides for each levy, which in one way or another is constrained by constitutional provisions.

### Ad Valorem Tax Levies for School Purposes

#### General Fund:

Certification of Need	15 mills
Local Support Levy	10 mills
Emergency Levy	5 mills
Countywide Levy	4 mills
School portion of County Levy	<u>5 mills</u>
<u>General Fund Total:</u>	39 mills

Building Fund: 5 mills

Sinking Fund: Varies  
Through bond issue election with 60% majority vote or judgments against the district. Bond amounts can not exceed 10% of the district's total assessed valuation.

All Federal funds are dedicated to specific programs for target populations (e.g., school lunch programs, special education, economically disadvantaged, etc.)

Expenditures of appropriated revenue by the State Department of Education (SDE) can be broken down into seven main categories:

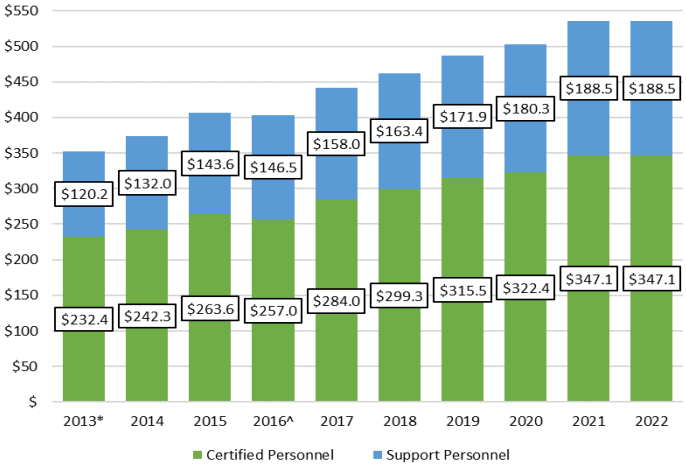
### **SDE Appropriation Expenditure Categories, FY 2022**

State Aid Funding Formula	\$2,437,246,699
Flexible Benefits Allowance (FBA)	\$535,537,021
Public School Activities	\$108,919,026
Instruction Materials	\$60,000,000
SDE Administration	\$15,027,640
School Consolidation Assist. Fund	\$3,827,899
Teachers' Retirement System Fund	\$3,827,899

## EDUCATION

The Flexible Benefit Allowance is provided for certified and support personnel of school districts. Currently, OK provides a benefit allowance of \$615.90 per full-time employee. This amount is tied to the Health Choice High Individual Plan Rate.

**Appropriations for FBA, FY 2013 – 2022**  
(in millions)

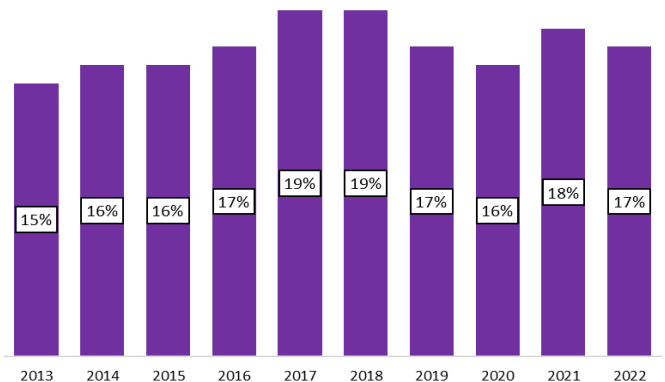


\*Totals include supplemental

^Totals are after cuts/adjustments due to revenue failure.

Source: SDE

**FBA as a Percentage of Common Education Appropriations**  
**FY 2012 - 2021**

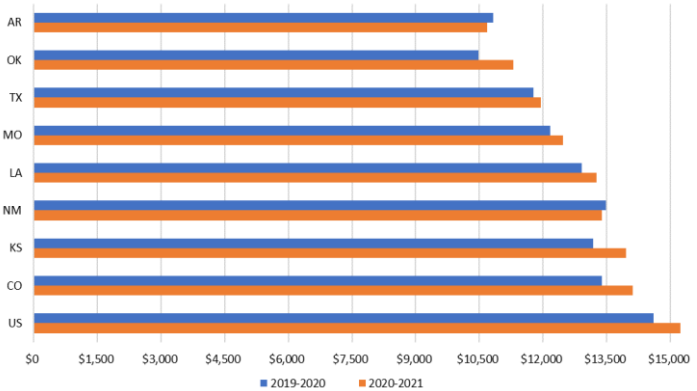


Source: OSSBA

## EDUCATION

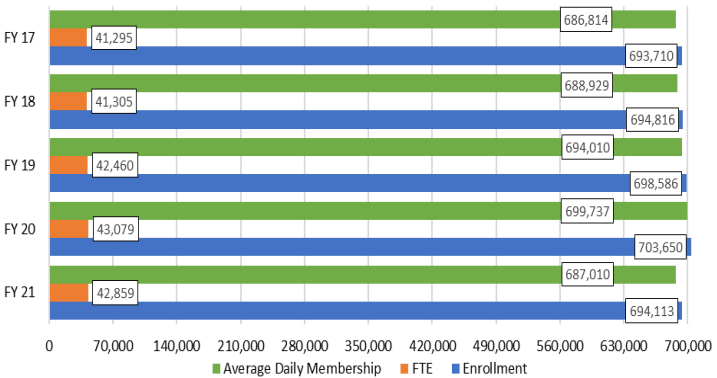
The next few graphs provide information about OK's common education system statewide.

### Average Per Pupil Expenditures, FY 2020 compared to FY 2021



Source: 2021 Rankings and Estimates Report, <https://www.nea.org/research-publications>

### Average Daily Membership, Enrollment, and Number of Teachers, FY 2017 – 2021

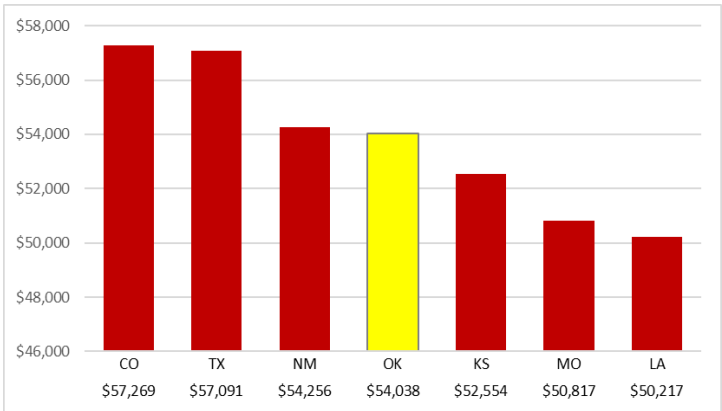


Source: SDE; <https://sde.ok.gov/public-records>

- Enrollment is a headcount of the students enrolled in a school on October 1.
- Average daily membership (ADM) means the average number of pupils present and absent in a school district during a school year. It is calculated by dividing the sum of the pupil's total days present and total days absent by the number of days taught.

## EDUCATION

### Average Teacher Compensation, FY 2020



Source: [https://nces.ed.gov/programs/digest/d20/tables/dt20\\_211.60.asp?current=yes](https://nces.ed.gov/programs/digest/d20/tables/dt20_211.60.asp?current=yes)

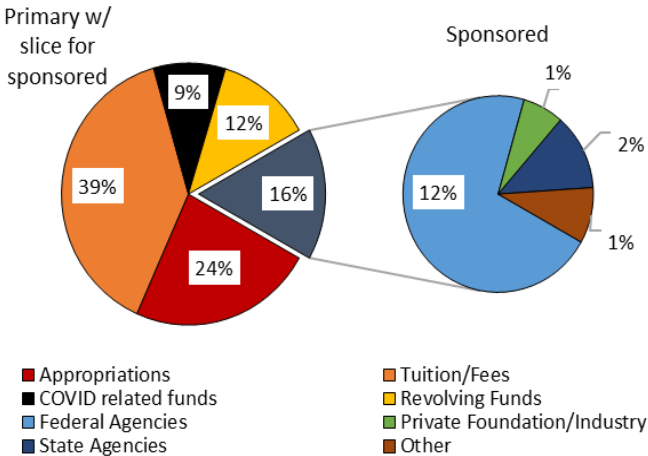
- HB 1023xx (2017 Second Special Session) increased the minimum salary schedule in amounts ranging from 15% to 18%. HB 1026xx (2017 Second Special Session) increased the annual compensation for education support personnel by \$1,250.
- HB 2756 (2019 Legislative Session) increased compensation for certified personnel by an average of \$1,200.

### Higher Education

The Educational and General (E&G) Budget is the principal operating budget of the system. It includes the primary functions of Instruction, Research, and Public Service, as well as the activities that support these three main functions. It is distinct from the capital budget, which includes expenditures for new construction, major repairs or renovations, and major items of equipment. It also excludes auxiliary enterprises, which provide services tangential to the education process, such as housing, food services, and the college store. The E&G budget is broken down into two parts. Part I is the primary budget and revenue sources include appropriations, tuition/fees, special distributions, and revolving funds. Part II is known as the sponsored budget and is funded from external sources - federal awards, grants, and training contracts; private contracts; and contracts from other state agencies.

## EDUCATION

### Higher Education Total Funding FY 2021



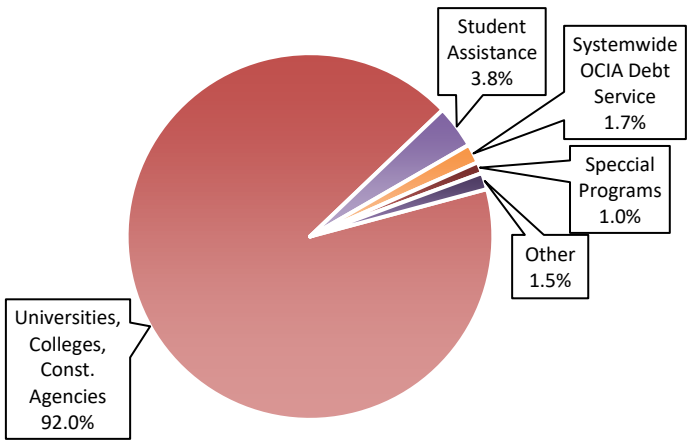
Source: OSRHE- Fiscal Year 2022 Educational and General Budgets Summary and Analysis Report

Source	FY 2021	FY 2022
<b>Primary:</b>		
Appropriations	\$840,414,742	\$878,219,822
Tuition/Fees	\$1,356,907,271	\$1,451,252,296
COVID related funds	\$55,965,401	\$341,267,827
Revolving Funds	\$449,178,912	\$453,506,597
<b>Sponsored:</b>		
Federal Agencies	\$368,391,555	\$432,078,376
Private Foundation/Industry	\$42,045,941	\$42,325,922
State Agencies	\$83,519,226	\$76,042,840
Other	\$55,662,630	\$55,649,448
<b>Total</b>	<b>\$3,252,085,678</b>	<b>\$3,730,343,128</b>

Appropriation totals includes funding provided for Oklahoma's Promise, also known as Oklahoma's Higher Learning Access Program (OHLAP). For FY '21, \$70 million was apportioned to OHLAP and for FY '22 the amount was \$65.4 million. Funding for OHLAP is part of the "off the top" funds that come from individual income tax collections.



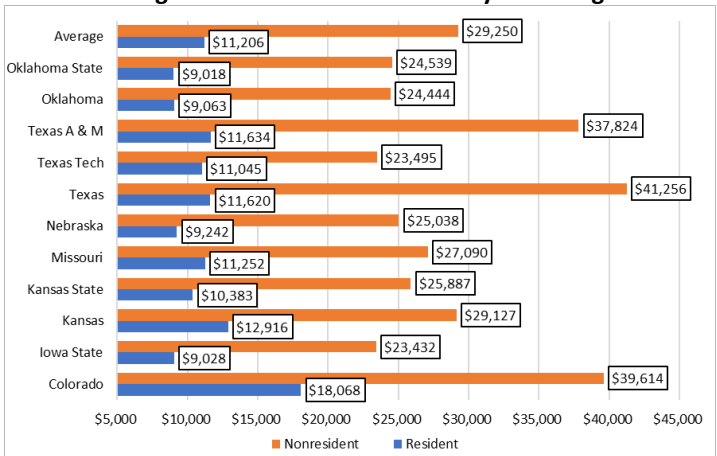
## EDUCATION FY 2022 Budget Breakdown



Source: OSRHE- Fiscal Year 2022 Educational and General Budgets Summary and Analysis Report

- Institutions educational and general operating budgets make up 92% of the total budget.
- 76.8% of state appropriations to Higher Education are used for institutions' operating budgets.
- State Regents saw a 5.5% increase in state appropriations support for FY 22.

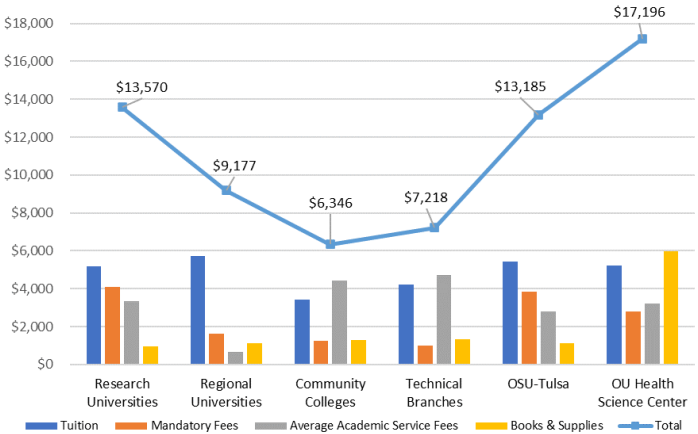
### FY '20 Undergraduate Tuition & Mandatory Fees - Big Twelve\*



\*Based on 30 credit hours

## EDUCATION

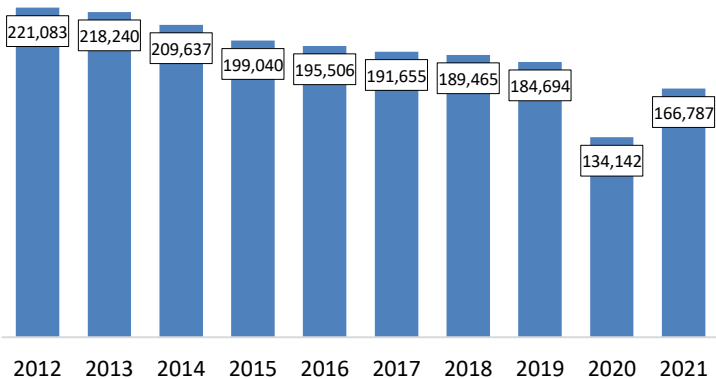
### FY 2022 Average Cost – Undergraduate Resident



Source: OK State Regents for Higher Education

- Undergraduate tuition and mandatory fees for resident students at research universities will be at a rate less than the average rate charged at public institutions in the Big Twelve Conference.
- Undergraduate tuition and mandatory fees for resident students at regional universities and community colleges will be at a rate less than the average rate charged at like-type institutions that include, but are not limited to, those adjacent to Oklahoma.

### Ten Year Comparison of Fall Headcounts

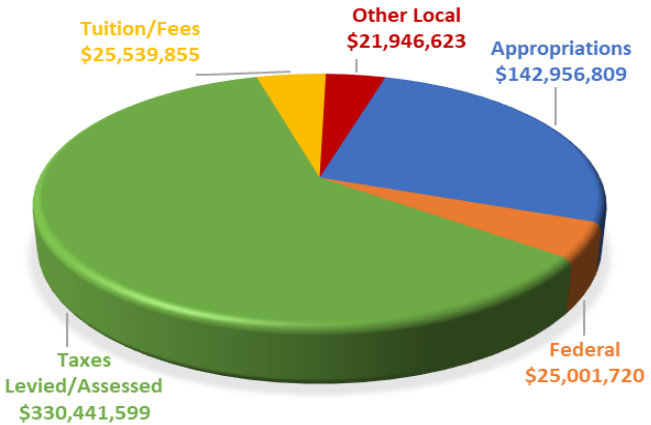


Source: OK State Regents of Higher Education

## EDUCATION Career Tech

The comprehensive Career Tech system delivers educational services through 394 PK-12 school districts (comprehensive schools), 29 technology center districts, 14 Skills Centers sites- which offer specialized, occupational training to adult and juvenile incarcerated individuals, 31 adult basic education providers, and to more than 5,670 businesses through various business and industry development programs.

### Agency and Technology Centers' General Fund Total Funding FY 2020



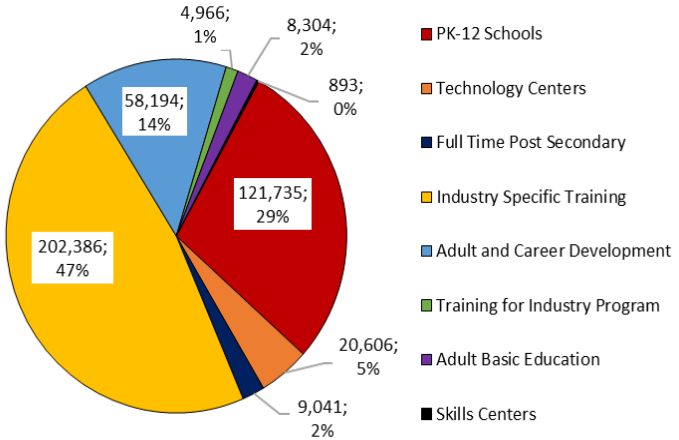
Source: <https://www.okcareertech.org/technology-centers/technology-center-annual-reports/dams-technology-center-annual-reports/tcar-2020-reports-fy20-tc-revenue-report> ; FY '20 Annual Report- CareerTech System

Like Common Education, technology centers are also supported by ad valorem millages assessed on real property within a technology center district. There are four ad valorem levies CareerTech's are constitutionally allowed:

CareerTech/Community College Levy	5 mills
CareerTech Local Incentive Levy	5 mills
CareerTech Building Fund Levy	5 mills
CareerTech Sinking Fund Levy	Limited to 5% of net assessed valuation

## EDUCATION

### FY 2021 Enrollments in Career Tech Programs



Source: <https://www.okcareertech.org/about/careertech-system/annual-report/dams-annual-report/2021AnnualReport1013.pdf>

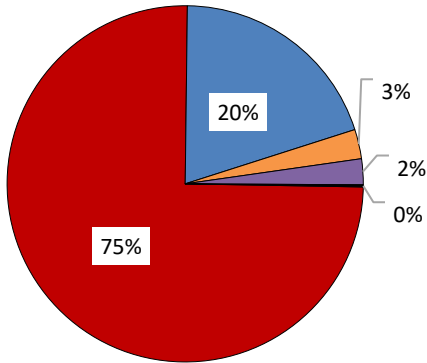
- In FY 2021, Oklahoma CareerTech annual enrollments totaled more than 426,000.
- Oklahoma CareerTech system graduates add more than \$3.5 billion annually to the state's economy.

Businesses Served by Business & Industry Development Prog.	FY 2020	FY 2021
Training for Industry Program	25	28
OkPTAC	703	506
Adult & Career Development	1,072	639
Customized Industry	3,887	3,297
Safety	2,055	1,596
Firefighter Training	248	287
Entrepreneurial Development	360	396

- In FY 2021 CareerTech helped 6,749 Oklahoma businesses increase sales, improve productivity, reduce costs and expand operations.

The next few graphs apply to just the state agency of the OK Department of Career and Technology Education.

## EDUCATION FY 2022 Funding Sources

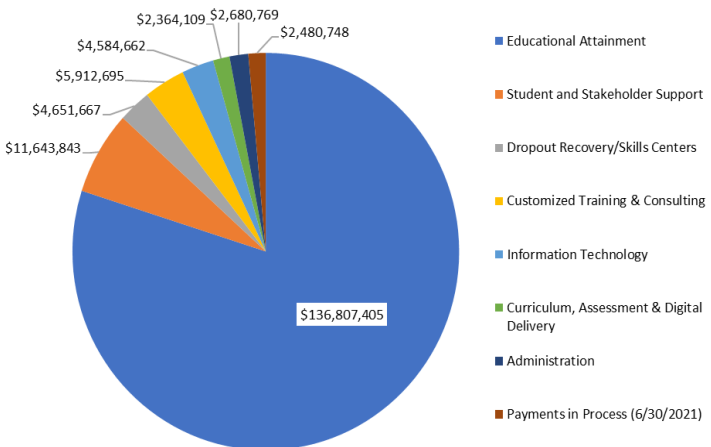


■ GR Appropriations ■ Federal ■ Revolving ■ Lottery ■ Agency Special Account

Source	FY 2021	FY 2022
GR Appropriations	\$133,470,385	\$134,641,723
Federal	\$27,985,686	\$35,727,180
Revolving	\$5,394,844	\$4,797,588
Lottery	\$4,001,486	\$4,210,689
Agency Special Account	\$345,000	\$345,000
<b>Total</b>	<b>\$171,197,401</b>	<b>\$179,722,180</b>

Source: FY'22- <https://www.okcareertech.org/about/careertech-system/business-plan/dams-business-plan/business-plan>

## FY 2021 Budgeted Expenditures



## EDUCATION

### Oklahoma Education Lottery

In the general election of November, 2004, OK voters approved not only the State-Tribal Gaming Act, but also the OK Education Lottery Act. As set in statutes, net proceeds from lottery sales that go toward education must be divided as follows:

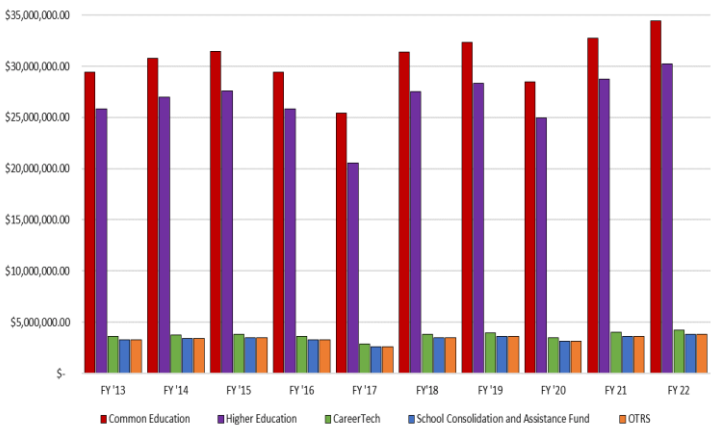
45% K-12<sup>th</sup> grade public education and early childhood development programs (Common Education)

45% Higher Education and Career Tech education tuition assistance programs, capital projects, endowed chairs, and technology improvements (This portion is divided so that 39.5% goes to Higher Ed and 5.5% goes to Career Tech.)

5% Deposited into the Teachers' Retirement System Dedicated Revenue Revolving Fund

5% Deposited into the School Consolidation Assistance Fund

#### Lottery Proceeds Distributions, FY 2013 – 2022



- In FY 2021, Oklahoma Lottery net sales totaled more than \$346.8 million.
- As of October 15, 2021, lottery proceeds have contributed \$1,095,060,130 to education since distributions began in FY 2006.

## EDUCATION

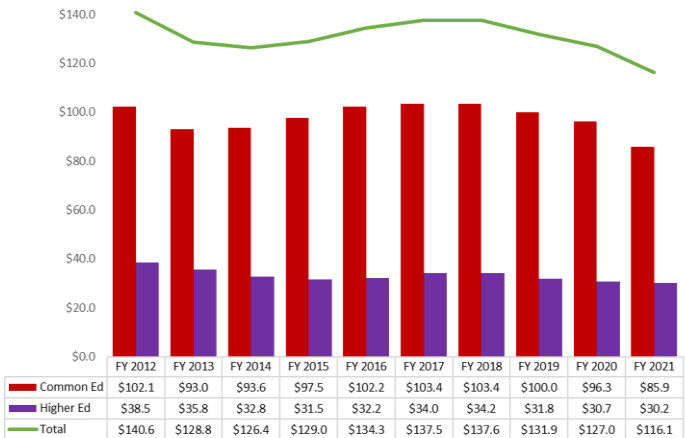
### Commissioners of the Land Office

The Organic Act of 1890 and the Oklahoma Enabling Act reserved Sections 16 and 36 of each township in Oklahoma for the use and benefit of the common schools. The distribution of common school funds is based on average daily attendance as reported by SDE.

Additionally, Section 13 of townships and quantity grants of land were given to support higher education. The OK Constitution and statutes determine the colleges and universities that receive funds. The money that is distributed is based on the lands that were set aside for that school at statehood.

Of the 3 million acres of land granted at statehood, CLO still own and manage 750,000 surface acres and 1.1 million mineral acres. Monies from the land leases are distributed monthly to the education beneficiaries.

**CLO Distributions, FY 2012 – 2021**  
(in millions)



Source: CLO Website

Higher Education institutions that receive funds: Cameron University, ECU, Langston University, Northeastern State University, Northern OK College, Northwestern OSU, OK Panhandle State, OSU, Southeastern OSU, Southwestern OSU, UCO, OU, and the University of Science and Arts.

## GEN. GOVERNMENT & TRANSPORTATION

The General Government & Transportation (GG&T) Subcommittee is comprised of seventeen agencies:

- Aeronautics Commission
- State Auditor and Inspector
- State Election Board
- Dept of Emergency Management & Homeland Sec.
- Ethics Commission
- Office of the Governor
- House of Representatives
- Legislative Service Bureau (LSB)
- Office of Lieutenant Governor
- Office of Management & Enterprise Services (OMES)
- Merit Protection Commission
- Department of Military
- State Senate
- Space Industry Development Authority (OSIDA)
- OK Tax Commission (OTC)
- OK Department of Transportation (ODOT)
- State Treasurer

### GG&T Subcommittee Total Appropriations FY 2013 -2022

FY 2013	\$651,645,430
FY 2014	\$727,428,800
FY 2015	\$783,275,414
FY 2016	\$776,958,842
FY 2017	\$817,017,239
FY 2018	\$874,676,234
FY 2019	\$894,267,443
FY 2020	\$945,724,822
FY 2021	\$842,115,843
FY 2022	\$1,005,808,701

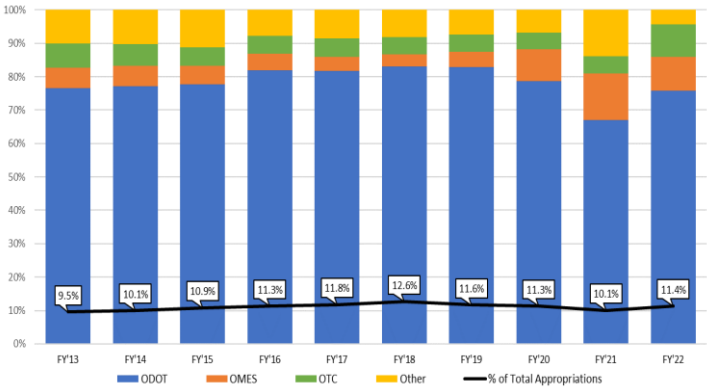
The appropriation figures include any supplementals and apportionments to the ROADS Fund, and account for any revenue failures whether in general revenue appropriations or in dedicated sources.



## GEN. GOVERNMENT & TRANSPORTATION

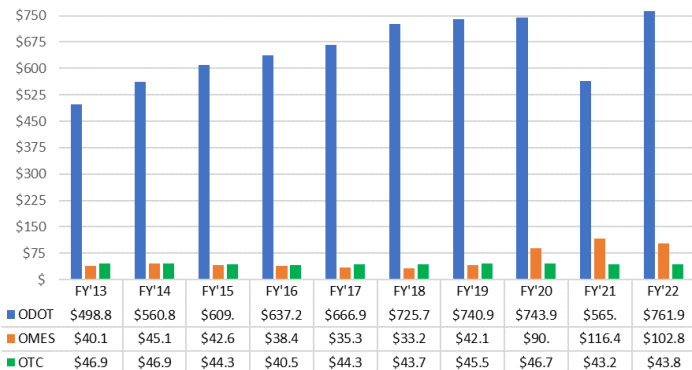
The following graph shows what percent of the subcommittee’s appropriation goes to specific agencies, along with what percent of total appropriations goes to the GG&T subcommittee.

**GG&T Subcommittee FY 2013 – 2022**



- GG&T has two of the top 12 appropriated agencies: ODOT and OMES.
- Since FY'13, appropriations to the GG&T Subcommittee have increased \$354,163,271 or 54.35%.
- Appropriations to the subcommittee increased \$163,692,858 or 19.44% from FY'21 to FY'22.

**Top 3 GG&T Agencies Appropriations, FY 2013 – 2022**  
(in Millions)



(Beginning with FY 2020, appropriations to OMES included bond payments for the Capital repairs.)

## GEN. GOVERNMENT & TRANSPORTATION

### Oklahoma Transportation by the Numbers

Measure	Oklahoma	US
Average Daily Person Miles	45	36.1
Average Daily Person Trips	3.39	3.37
Highway Fatality Rate (per 100 million vehicle miles)	1.44	1.13
Transportation Energy Use (Million Btu per capita)	122.8	86.2
Highway Fuel Use (Gallons per capita)	463.4	416.2

Measure	Value	US Rank
Miles of Public Road	114,638	14
Miles of Freight Railroad	3,197	18
Miles of Inland Waterway	150	30
Number of Bridges	23,155	8

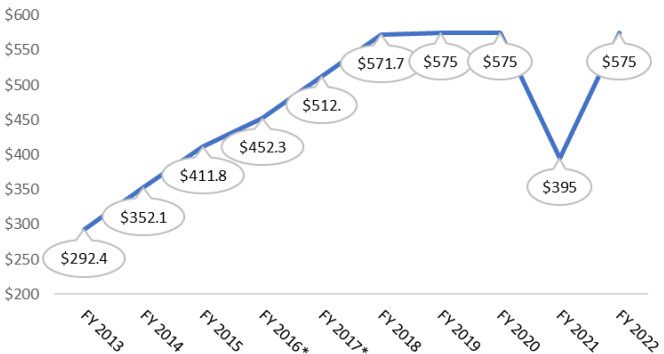
Source: Bureau of Transportation Statistics, January 2020

### How Residents (over the age of 16) get to Work

Work Commute	Oklahoma	US
Drive Alone	82.5%	76.3%
Carpool	9.5%	9.0%
Public Transportation	0.5%	4.9%
Bicycle	0.2%	0.5%
Walk	2.0%	2.6%
Motor-cycle, Other	1.2%	1.3%
Work From Home	4.1%	5.3%

Source: Dataset from 2019 (Bureau of Census, American Community Survey, Table B08006)

### ROADS Fund, FY 2013 – 2021 (in millions)



Source: February 2021 BOE Packet, Schedule 3

\*FY 2016 and 2017 amounts are after accounting for any revenue failures.

## GEN. GOVERNMENT & TRANSPORTATION

Created in 2005 in conjunction with ODOT’s eight-year plan, the Rebuilding Oklahoma Access and Driver Safety Fund, better known as the ROADS Fund, has become ODOT’s main source of revenue. The amount of collections apportioned to the Fund has been increased multiple times since its creation to the current level of \$575 million which began in FY 2013.

Funding for the ROADS Fund originally was an “off the top” apportionment from individual income tax collections, however, beginning with FY 2020, the ROADS Fund now receives most of its apportionment from new motor fuel taxes and changes to the apportionment of motor vehicle taxes and fees.

**Apportionments to the ROADS Fund**

Year	Income Tax	Motor Vehicle	Diesel Tax	Gasoline Tax	Total
FY'17 <sup>^</sup>	\$508,678,655	\$0	\$0	\$0	\$508,678,655
FY'18	\$571,669,915	\$0	\$0	\$0	\$571,669,915
FY'19	\$575,000,000	\$0	\$0	\$0	\$575,000,000
FY'20	\$290,914,164	\$171,483,470	\$55,092,527	\$57,509,839	\$575,000,000
FY'21 <sup>**</sup>	\$183,107,550	\$202,719,143	\$4,847,418	\$4,325,889	\$395,000,000

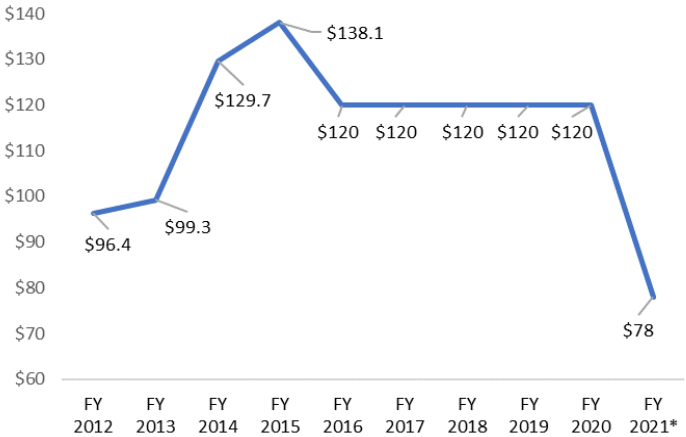
<sup>^</sup>SB1616 of the 2016 Legislative Session transferred \$200 million from the ROADS Fund to the Special Cash Fund to help with the fiscal year 2017 budget shortfall. HB3231 authorized the issuance of \$200 million in bonds to offset the transfer.

\*HB2743 of the 2020 Legislative Session redirected \$180 million of ROADS Fund apportionments to the Education Reform Revolving Fund for fiscal year 2021. To replace the redirected funds in fiscal year 2021, the Legislature passed HB2744, which issues bonds to raise \$200 million for highway and bridge projects in the Transportation Commission Construction Work Plan.

\*\*HB 2895 of the 2021 Legislative session made the ROADS Fund an authorized (requires appropriation) fund and increased the overall annual revenue cap to \$590 million beginning in FY '23.

## GEN. GOVERNMENT & TRANSPORTATION

**CIRB Fund, FY 2012 – 2021**  
(in millions)



Source: OTC Annual Reports

In 2006, the County Improvement for Roads and Bridges (CIRB) Fund was created to address transportation needs at the county level. CIRB was based on a five-year plan, and it was allocated five percent of the motor vehicle tax collections—that amount was increased several times and was up to 20 percent in 2015. After \$138 million was apportioned to the CIRB Fund in Fiscal Year 2015, the Fund was capped at \$120 million a year, and has reached that cap each year.

\* In 2021, the allocation formula to the CIRB Fund was modified on a formulaic basis by SB 1888 (2020) and then permanently adjusted by HB 2892 (2021). For more information, see the Motor Vehicle tax session paragraph on page 34. Total funds used for the purpose of the CIRB Fund still totaled \$120 million.

From FY 2008 through 2021, CIRB has funded 914 total construction projects, including 668 bridges replaced or repaired, and 1,103 roadway miles improved. The total CIRB funds during that time came in at over \$2.1 billion.

## GEN. GOVERNMENT & TRANSPORTATION

### 2021 Highway Bridge Ratings by State\*

State	Total No. of Bridges	No. of Bridges Rated Poor	% of Bridges Rated Poor
1. Georgia	6,808	23	0.34%
2. Arizona	4,844	32	0.66%
3. Iowa	4,152	30	0.72%
4. Kansas	5,095	37	0.73%
5. Texas	34,863	256	0.73%
6. Utah	1,846	14	0.76%
<b>7. Oklahoma</b>	<b>6,737</b>	<b>67</b>	<b>0.99%</b>
8. Nevada	1,155	12	1.04%
9. Florida	5,703	64	1.12%
10. Maryland	2,554	29	1.14%

Source: ODOT; Census Bureau

\* This ranking is compiled based on the Oklahoma Department of Transportation's (ODOT's) compilation and interpretation of raw data obtained from the Federal Highway Administration's (FHWA's) National Bridge Inspection reporting. The data is used by ODOT to develop a percentage based figure derived from the number of bridges classified as structurally deficient as relative to the number of jurisdictional bridges for the purposes of performance measurement and benchmarking. The jurisdictional responsibility for managing bridge infrastructure may vary by state and the ranking is intended to comparatively reflect only bridges on the State, US and Interstate highways. The ranking has not been explicitly provided, nor endorsed, by the FHWA, and while every effort has been made to validate the accuracy of the ranking, anomalies may exist.

The effects of the increased funding for roads and bridges is evident in the improving conditions of Oklahoma bridges.

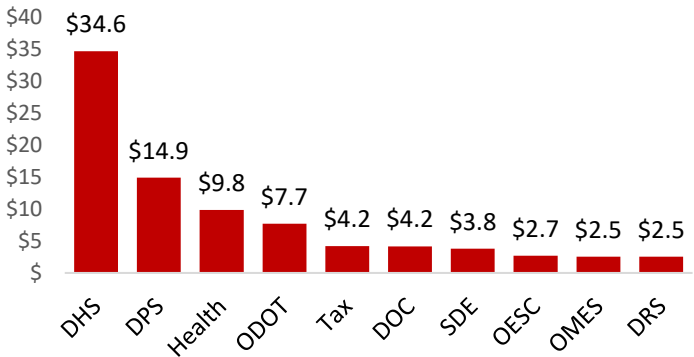
- Oklahoma has moved from being ranked 49th nationally for highway bridge conditions to 7th in only seventeen years.
- Oklahoma has fewer residents per highway bridge (586) than all other states in the top 10 except Kansas (570).

## GEN. GOVERNMENT & TRANSPORTATION

### Office of Management and Enterprise Services (OMES)

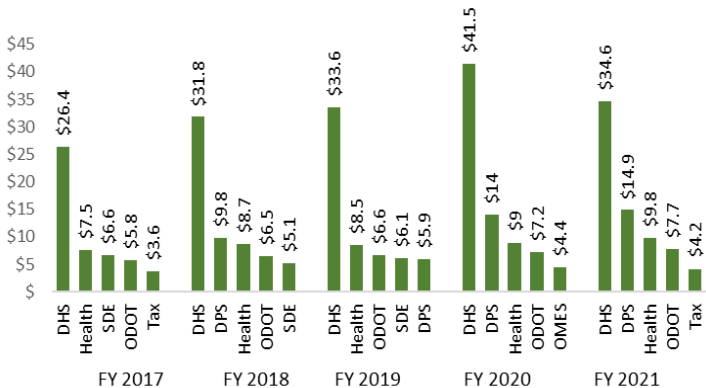
The Office of Management and Enterprise Services could be considered the state government’s administrative office. Agencies are required to use them for finance, property, human resources, and technology services. The following charts provide additional data about technology service spending and agency procurement.

**FY '21 Top 10 Technology Service Spending**  
(in millions)



Source: OMES

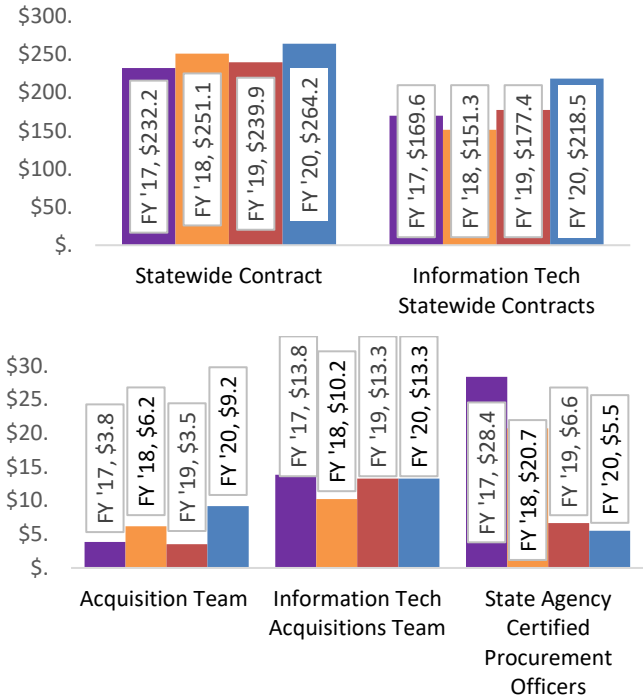
**Top 5 Agency Tech Service Spending, FY '17-FY'21**  
(in millions)



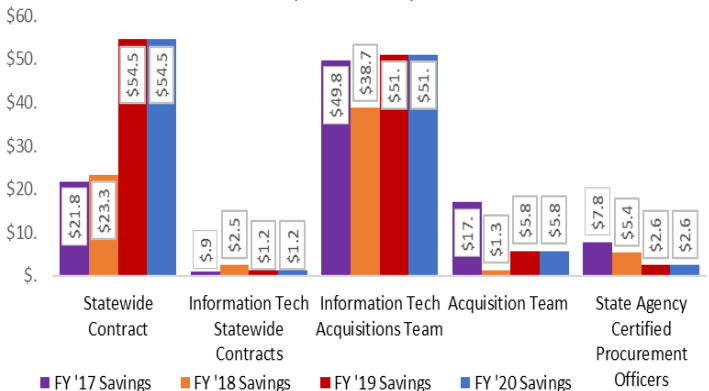
Source: OMES

# GEN. GOVERNMENT & TRANSPORTATION

## State Procurement Spending (in millions)



## State Procurement Savings (in millions)



## HEALTH & HUMAN SERVICES

The Health & Human Services (HHS) Subcommittee is comprised of twelve agencies:

- Commission on Children and Youth (OCCY)
- Department of Health (OSDH)
- Department of Human Services (DHS)
- Department of Rehabilitation Services (DRS)
- Department of Veterans Affairs (ODVA)
- Oklahoma Health Care Authority (OHCA)
- J.D. McCarty Center
- OK Department of Mental Health and Substance Abuse Services (DMHSAS)
- Office of Disability Concerns (ODC)
- Office of Juvenile Affairs (OJA)
- OSU Medical Authority (OSUMA)
- University Hospitals Authority (UHA)

### HHS Subcommittee Total Appropriations FY 2013 -2022

FY 2013	\$2,092,191,118
FY 2014	\$2,261,000,834
FY 2015	\$2,251,562,919
FY 2016	\$2,123,796,711
FY 2017	\$2,257,844,659
FY 2018	\$2,329,175,674
FY 2019	\$2,465,670,623
FY 2020	\$2,441,644,827
FY 2021	\$2,391,950,320
FY 2022	\$2,611,122,497

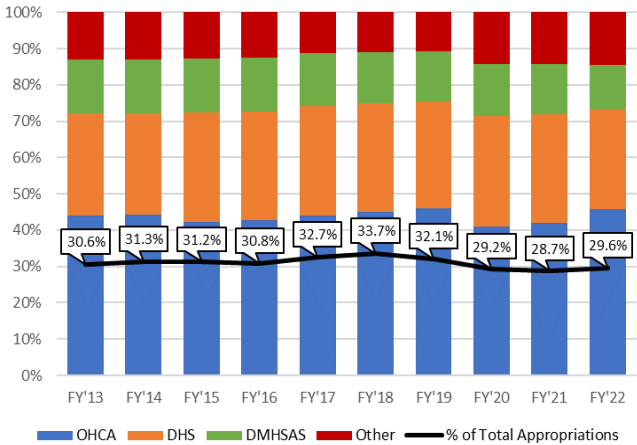
The appropriation figures include any supplementals and accounts for any revenue failures whether in general revenue appropriations or in dedicated sources.

The following graph shows what percent of the subcommittee's appropriation goes to specific agencies, along with what percent of total appropriations goes to the HHS subcommittee.



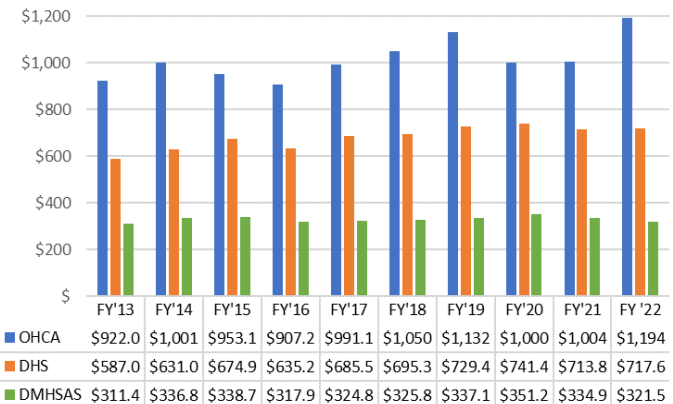
## HEALTH & HUMAN SERVICES

### HHS Subcommittee FY 2013 – 2022



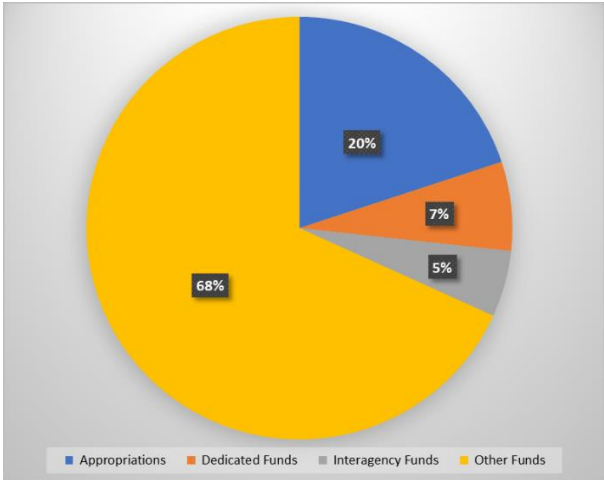
- HHS contains five of the top 12 highest appropriated agencies.
- Of those five agencies, three of them -the Oklahoma Health Care Authority, Department of Human Services, and the Department of Mental Health and Substance Abuse Services- receive 85.5% of the subcommittee’s appropriation with the remaining 9 agencies receiving 14.5%.

### Top 3 HHS Agencies Appropriations, FY 2013 – 2022 (in Millions)



## HEALTH & HUMAN SERVICES

### HHS FY'22 Budget by Source

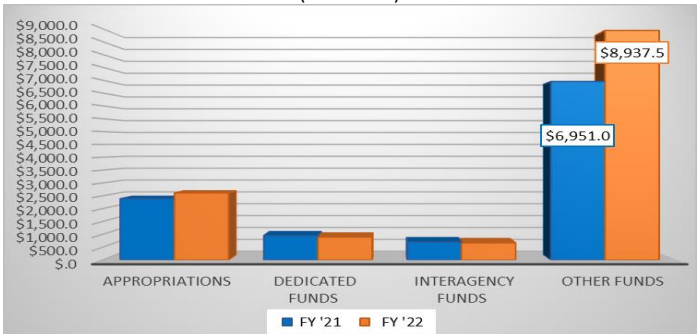


The largest source of HHS agency funding comes from the federal government through the federal-state partnership of Medicaid. The federal government matches state dollars through the Federal Medical Assistance Percentage or FMAP. "Other Funds" in the chart above include federal dollars going directly to agencies in addition to county collections for the State Department of Health.

The "Other" Column has grown significantly in recent years due to increasing FMAP rates, federal legislation during the public health emergency, and the expansion of the state's Medicaid program.

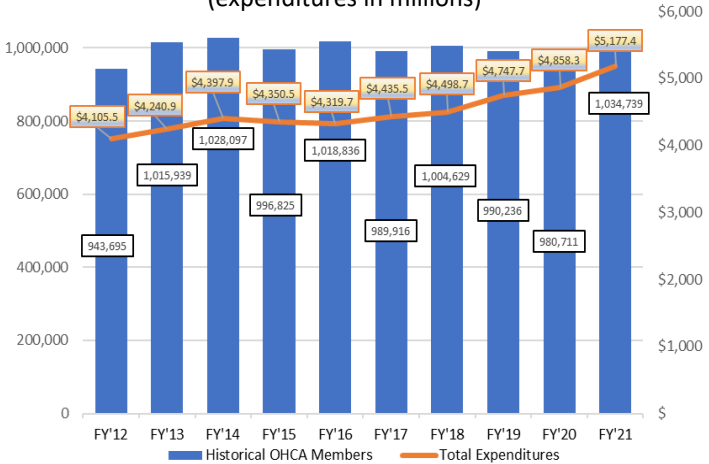
### HHS Budget by Source, FY '21 to FY '22

(in millions)



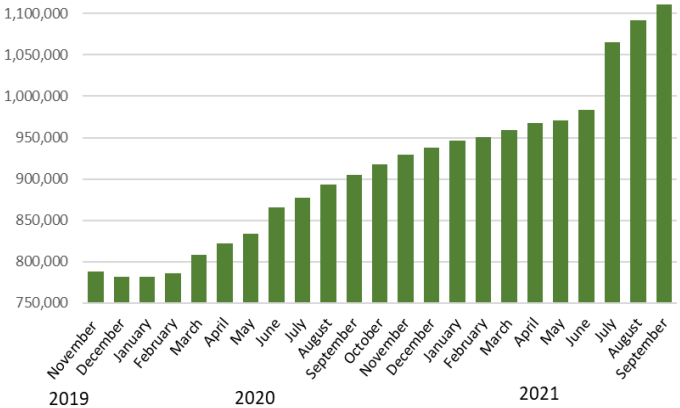
## HEALTH & HUMAN SERVICES

### OHCA Enrollees and Expenditures, FY 2012-2021 (expenditures in millions)



Source: OHCA <http://www.okhca.org/research.aspx?id=17500>

### Medicaid Enrollment During COVID

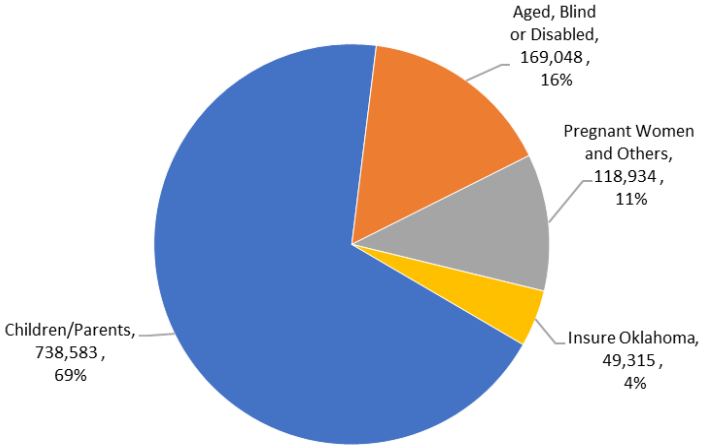


Source: OHCA <http://www.okhca.org/research.aspx?id=2987>

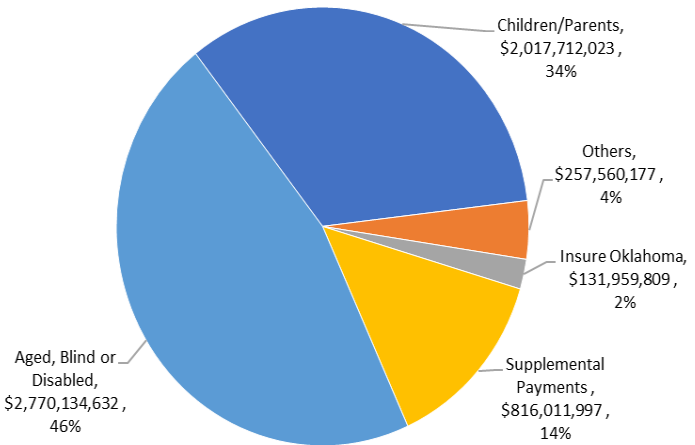
Part of the federal government’s response to the pandemic was to increase the Medicaid funding rates. However, the acceptance of this higher rate disallowed any reduction of the Medicaid enrollment other than death or moving out of state. This coupled with increased unemployment led to a sharp increase in Medicaid Enrollment.

## HEALTH & HUMAN SERVICES

### OHCA Enrollees by Population, FY '21

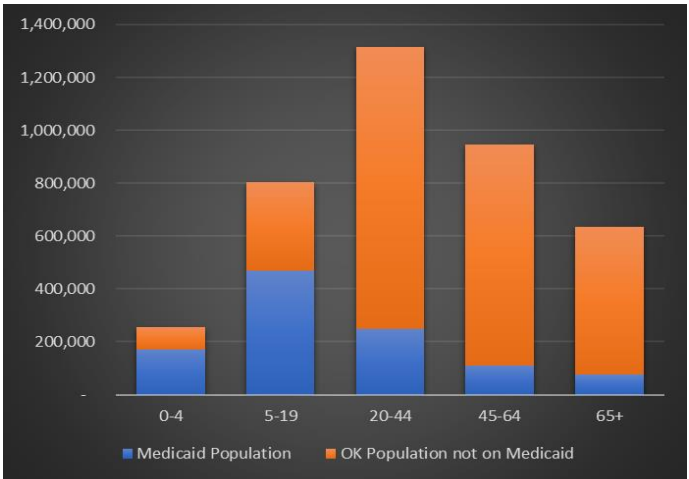


### OHCA Expenditures by Population, FY '21



## HEALTH & HUMAN SERVICES

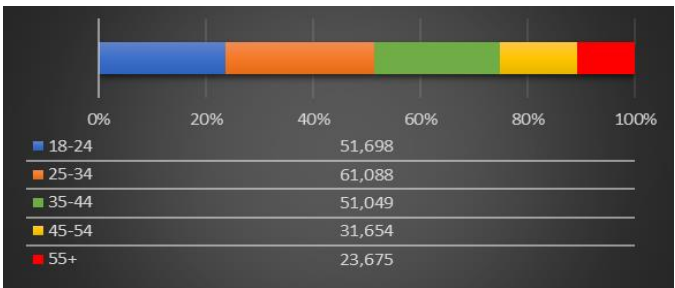
### Oklahoma Population by Medicaid Enrollment, FY '21



Source: <http://www.okhca.org/research.aspx?id=17501>

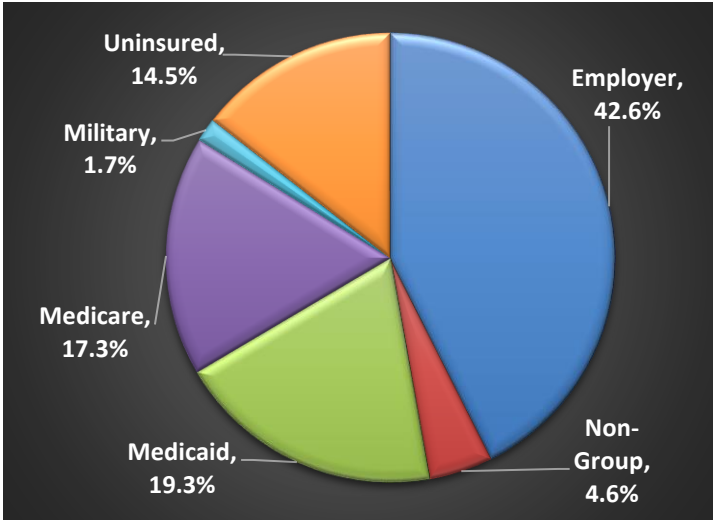
- With the passage of SQ 802, Oklahoma expanded Medicaid coverage to low-income adults (18-65) with incomes below 138% of the federal poverty level.
- This will increase the Medicaid population by approximately 215,353 across the entire Medicaid program with an estimated state cost of \$164,138,054 in FY '22.
- On 11/1/2021, there were 219,164 enrolled through the expansion process. Of this amount, 139,816 are new enrollees and 79,348 were enrolled in Medicaid but moved to expansion for the higher federal match rate.

### Medicaid Expansion Enrollees by Age, July-October, 2021

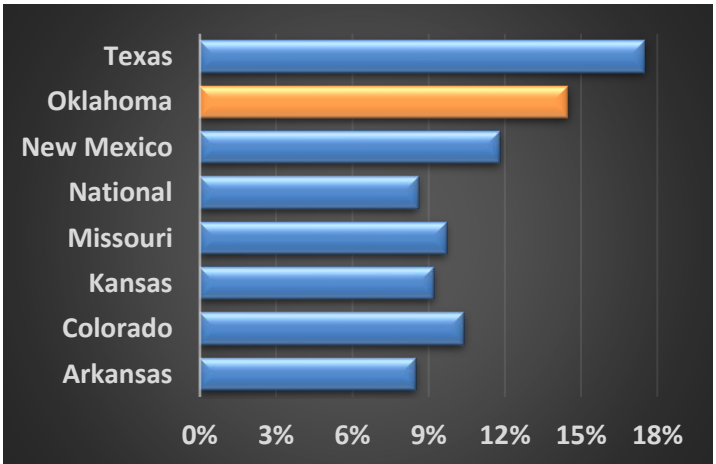


## HEALTH & HUMAN SERVICES

### Insurance Coverage in Oklahoma, 2020



### Uninsured Population, 2020

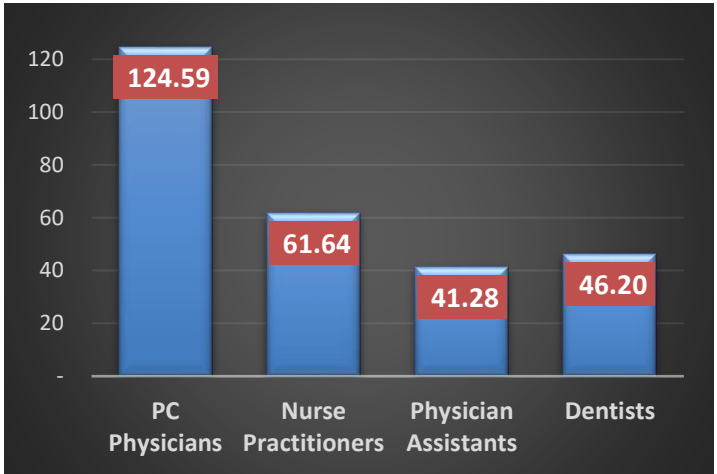


Source: Kaiser Family Foundation

<https://www.kff.org/other/state-indicator/health-insurance-coverage-of-the-total-population-cps/?currentTimeframe=0&sortModel=%7B%22colId%22:%22Location%22,%22sort%22:%22asc%22%7D>

## HEALTH & HUMAN SERVICES

### Primary Caregivers per 100,000 Population September 2021 (est.)



Source: Kaiser Family Foundation

<https://www.kff.org/state-category/providers-service-use/?state=OK>

(Primary Care includes: Internal Medicine, Family Medicine/General Practice, Pediatrics, OB/GYN, and Geriatrics)

Per capita Oklahoma ranks:

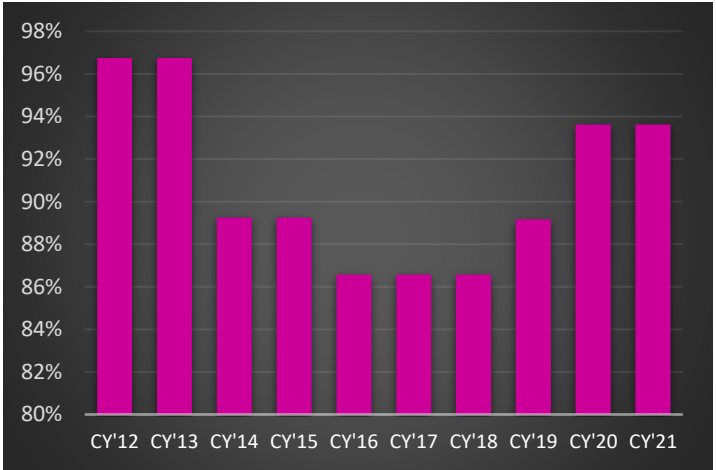
- 37th in Primary Care Physicians
- 38th in Nurse Practitioners
- 18th in Physician Assistants
- 37th in Dentists

The federal government ceased funding medical school graduates through the GME program in FY'19. Since that time the Legislature has increased appropriations to make up those missing federal dollars. These medical schools are one of the state's greatest tools to increase the number of physicians in Oklahoma.

Of the 2021 academic year graduates, 60% of Primary Care graduates from OU and OSU medical schools began practicing here in Oklahoma after their graduation.

## HEALTH & HUMAN SERVICES

### Medical Care Reimbursement Rate, Calendar Year 2012 – 2021



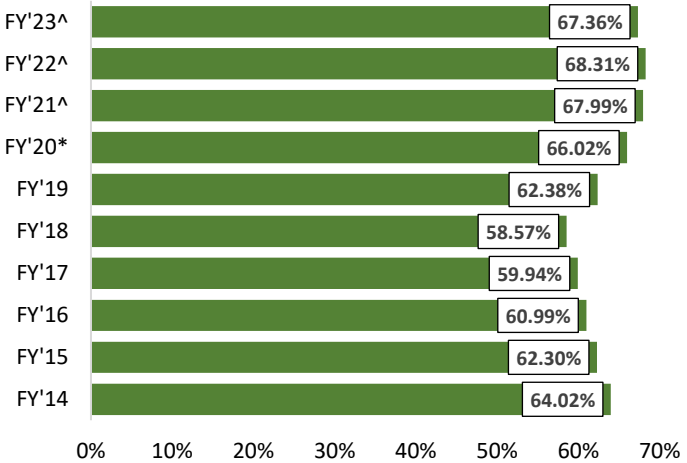
Source: OHCA

- Medicaid rates are set as a percentage of the state's rates paid for Medicare services. These Medicaid rates were lowered during the Great Recession and again in FY'16.
- The Legislature has prioritized increasing reimbursement rates for health providers in recent years and has increased the rates in both 2019 and 2020.
- In FY'19 Medicaid contracted long-term care facilities received a 3% increase and most other providers had an increase of 2%.
- In FY'20 most providers received a 5% increase to their provider rates in addition to increasing payments for long-term care facilities meeting performance standards.



## HEALTH & HUMAN SERVICES

### Oklahoma FMAP Rates by Federal FY 2012 – 2023, (Not Including Enhanced Rates during the COVID Emergency)



Source: Kaiser Family Foundation

<sup>^</sup> FY'21-'23 do not include the 6.2% increase from FFCRA or 5% increase from ARPA.

\* FY'20 does not include the 6.2% increase from FFCRA.

Oklahoma has seen a fast-paced increase in the state's FMAP rate, increasing nearly 10 percentage points in 4 years (FFY '18 – FFY '22). Due to this tremendous increase in federal dollars to the Medicaid system, starting in FY'20, the Legislature created the Rate Preservation Fund (RPF) located within OHCA. The Legislature has been steadily depositing savings from this increased federal match to the RPF for use in the future to maintain provider rates when the FMAP rate decreases just as it is set to in FFY'23.

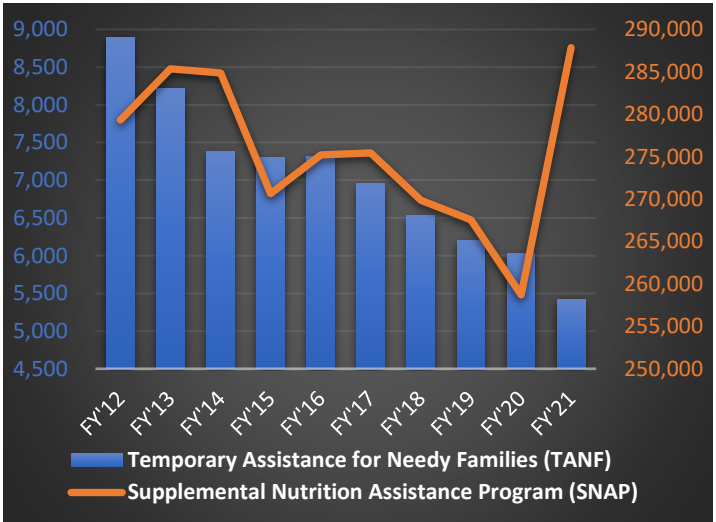
By the end of SFY'22, the Rate Preservation Fund balance will be \$197,591,272 with most of the balance (\$164,138,054) being deposited in FY'22.

#### Rate Preservation Fund End of FY Balance

FY 2020	\$29,360,748
FY 2021	\$33,453,218
FY 2022	\$197,591,272

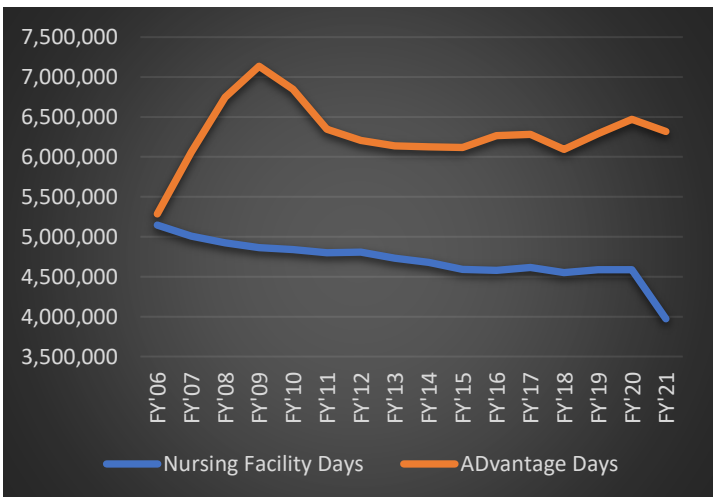
## HEALTH & HUMAN SERVICES

### Families Served by SNAP/TANF, FY 2012 – 2021 (monthly average)



Source: DHS

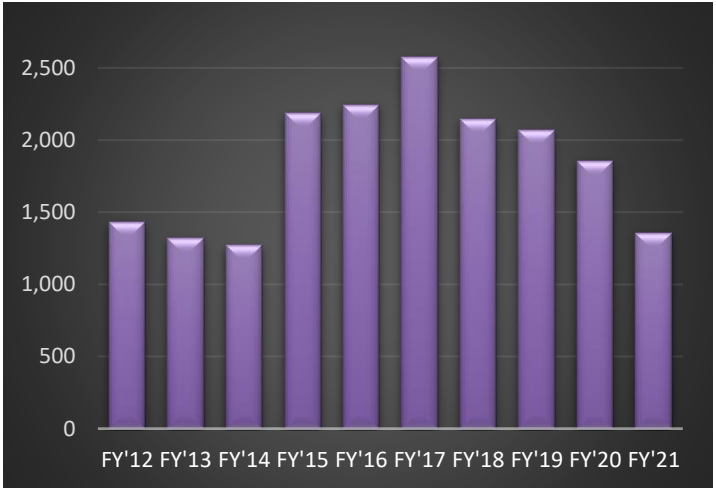
### ADvantage Days vs. Nursing Home Days FY 2006 – 2021



Source: DHS

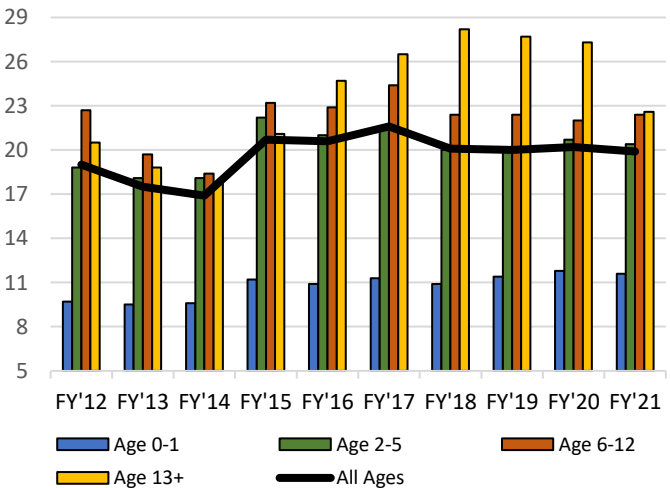
## HEALTH & HUMAN SERVICES

### Adoptions Finalized, FY 2012 – 2021



Source: DHS

### Average Length of Stay with DHS by Child Age, FY '12-FY'21 (in months)



Source: DHS

## HEALTH & HUMAN SERVICES

### Developmental Disabilities Services Waiver Waiting List - End of Fiscal Year Figures, FY 2012 – 2021

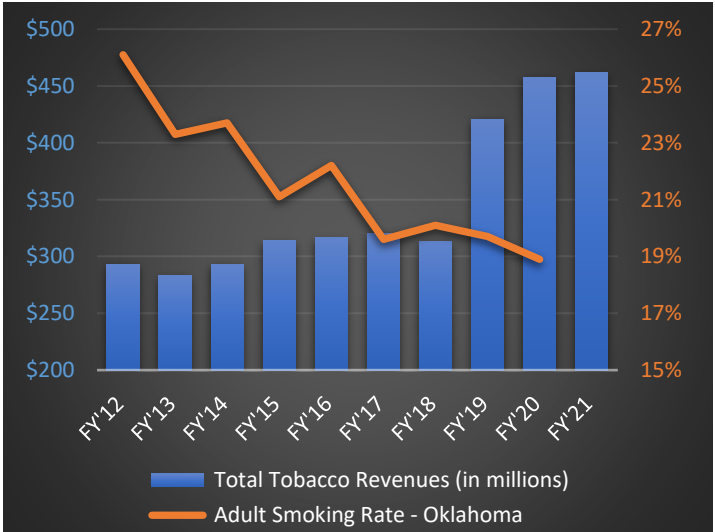


Source: DHS

- The Legislature continues to place a high priority on funding for DDSD services, but there are currently more people needing services than funding allows. For this reason, the DDSD Waiting List was created. The Legislature has continued to increase funding to allow more people to begin waiver services.
- In FY'19 the Legislature doubled the previous highest one-year increase to the division with an additional \$2 million in funding.
- The Legislature continued these increases by adding an additional \$2 million in FY'20, \$1.92 million increase in FY'21, and \$2 million in FY '22.
- The total amount of appropriated dollars that is budgeted for the Developmental Disabilities Services Division for FY '22 is \$153,784,759.

## HEALTH & HUMAN SERVICES

### Tobacco Use in Oklahoma



Source:

<https://www.americashealthrankings.org/explore/annual/measure/Overall/state/OK>

OK Tax Commission Apportionment Charts: <https://oklahoma.gov/tax/reporting-resources/statistics.html#ca>

- In 2019, Oklahoma was ranked the 46th most healthy state in the nation.
- There are several factors leading to this ranking, however one of the larger determinants is the high smoking rate in Oklahoma.

To help with the increased financial burden by the health of smokers, the Legislature has from time to time increased the tax on the sale of tobacco products. One such instance of this policy can be seen in the increase of collections starting in FY'19. These increased collections have been appropriated to OHCA to help fund the Medicaid program.

## HEALTH & HUMAN SERVICES

### Tobacco Settlement Endowment Trust Fund Assets and Receipts

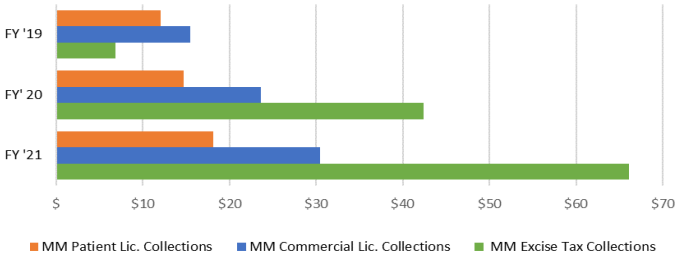
Fiscal Year	Settlement Receipts	Expenditures	Net Investment Income	EOY Investment Assets, Fair Value	EOY Net Position
2011	\$56,954,970	\$20,537,062	\$92,487,965	\$591,989,512	\$662,106,863
2012	\$58,062,948	\$32,625,414	\$8,905,067	\$672,315,506	\$705,681,439
2013	\$85,057,305	\$36,433,205	\$69,040,910	\$789,995,839	\$829,616,410
2014	\$57,887,005	\$37,669,641	\$111,021,307	\$923,128,052	\$968,635,426
2015	\$57,645,300	\$50,395,798	\$14,846,036	\$973,596,294	\$996,857,397
2016	\$57,006,973	\$56,108,146	\$13,132,616	\$1,001,295,395	\$1,018,889,468
2017	\$58,464,784	\$58,435,031	\$110,607,357	\$1,117,092,450	\$1,136,364,620
2018	\$53,747,503	\$57,729,390	\$85,159,610	\$1,204,542,742	\$1,224,505,216
2019	\$52,325,117	\$53,748,117	\$64,335,446	\$1,275,118,724	\$1,295,793,200
2020	\$49,710,560	\$54,921,250	\$24,288,602	\$1,311,796,351	\$1,327,663,535
2021	\$55,721,453	\$54,360,892	\$342,972,310	\$1,662,239,597	\$1,684,355,219

Source: TSET Annual Audit Reports

- The 1998 Master Settlement Agreement (MSA) was between 46 states and the tobacco industry.
- The amount of money that the tobacco companies are required to annually contribute to the states varies according to several factors; however, all payments are based primarily on the number of cigarettes sold.
- Total of MSA payments to OK through FY 2021: \$1,679,646,763.
- 75% of MSA payments to Oklahoma are apportioned to TSET for investment, 18.75% is for the Legislature to appropriate (almost always, OHCA recipient of appropriations), and 6.25% is deposited into the Attorney General Evidence Fund.
- TSET focuses on grants and programs that improve health, specifically programs that prevent cancer, heart disease, and strokes.
- Only the earnings from endowment investments are used to fund grants and programs.

## HEALTH & HUMAN SERVICES

### Medical Marijuana (MM) Collections, FY '19-FY'21 (in Millions)



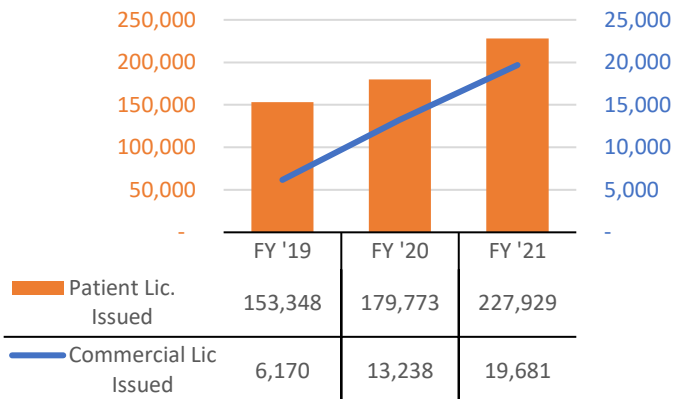
Source: OSDH

All revenue generated from medical marijuana in Oklahoma from sales and excise taxes as well as license collections go to one of four places: 1) OMMA, the division within OSDH responsible for regulation, 2) funding for education, 3) funding for substance abuse services, or 4) the General Revenue Fund.

### MM Revenue Allocation through FY '21

OMMA	\$81,316,386
Education	\$73,837,760
Substance Abuse Services	\$24,612,584
General Revenue Fund	\$74,144,003

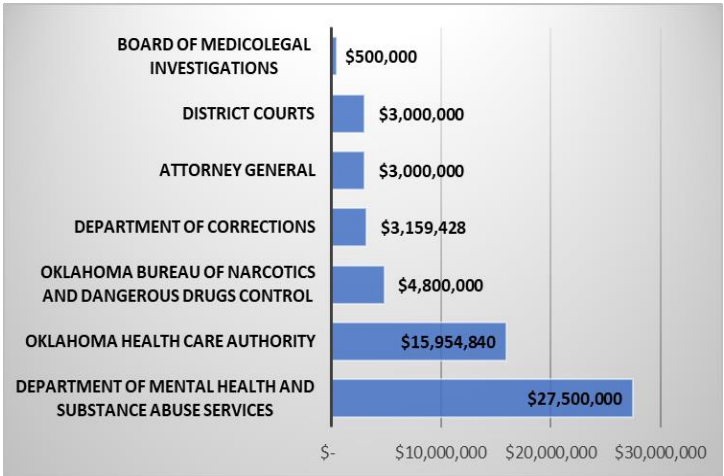
### Medical Marijuana Licenses, FY '19-FY '21



Source: OSDH

## HEALTH & HUMAN SERVICES

### FY'21 & '22 Total Opioid Lawsuit Settlement Fund Allocations



In 2019 Oklahoma sought compensation from the pharmaceutical companies it deemed to be behind the ongoing opioid pandemic. Oklahoma was awarded \$465 million in its lawsuit against Johnson & Johnson; however, in November of 2021, the Oklahoma Supreme Court reversed the decision of this case.

The state also settled with:

- Purdue Pharma - \$270 million
- Teva Pharmaceutical - \$85 million
- Endo International - \$8.75 million

After litigation costs, all settlement and lawsuit dollars will be deposited into the Opioid Lawsuit Settlement Fund except for the Purdue settlement. Those dollars were agreed to fund a research and treatment center at OSU - Tulsa.



## NATURAL RESOURCES & REG. SERVICES

The Natural Resources & Regulatory Services (NRRS) Subcommittee is comprised of eleven appropriated agencies and two non-appropriated agencies:

- OK Dept. of Agricultural, Food, and Forestry (ODAFF)
- OK Department of Commerce (ODOC)
- Conservation Commission
- Corporation Commission
- Department of Environmental Quality (DEQ)
- OK Historical Society
- *OK Horse Racing Commission – non-appropriated*
- *OK Insurance Department – non-appropriated*
- J.M. Davis Memorial Commission
- OK Department of Labor
- OK Department of Mines
- OK Tourism and Recreation Department (OTRD)
- OK Water Resources Board (OWRB)

### **NRRS Subcommittee Total Appropriations FY 2013 -2022**

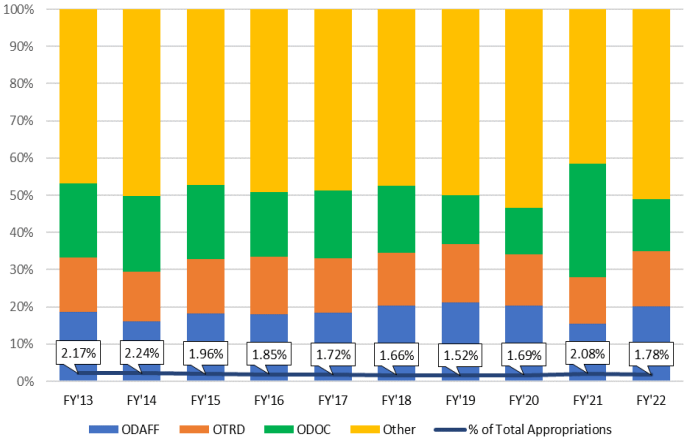
FY 2013	\$148,349,175
FY 2014	\$161,543,175
FY 2015	\$141,592,721
FY 2016	\$127,314,742
FY 2017	\$119,130,131
FY 2018	\$115,108,779
FY 2019	\$116,693,791
FY 2020	\$141,435,745
FY 2021	\$173,336,448
FY 2022	\$157,248,036

The appropriation figures include any supplementals and account for any revenue failures whether in general revenue appropriations or in dedicated sources. It also includes funding for REAP.

The following graph shows what percent of the subcommittee's appropriation goes to specific agencies, along with what percent of total appropriations goes to the NRRS subcommittee.

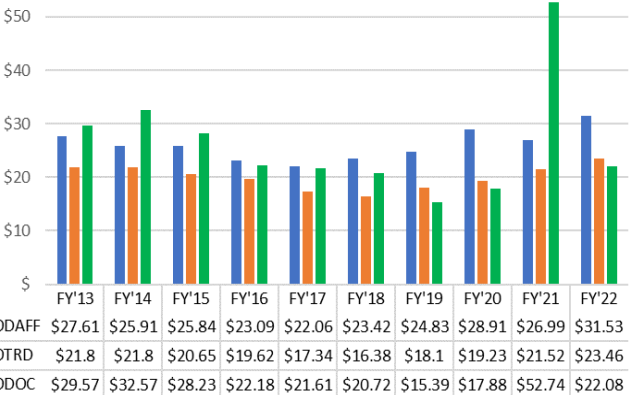
## NATURAL RESOURCES & REG. SERVICES

### NRRS Subcommittee FY 2013- 2022



- Since FY'13, appropriations to the Natural Resources and Regulatory Services Subcommittee have increased by \$8,898,861 or 6%.
- The spike in Commerce's FY '21 appropriation is due to onetime funding provided for the Quick Action Closing Fun (\$20M) and a business accelerator program (\$15M).

### Top 3 NRRS Agencies Appropriations, FY 2013 – 2022 (in Millions)



(Beginning in FY 2019, funding for the Native American Cultural and Educational Authority was removed from the Department of Commerce's appropriation.)

## NATURAL RESOURCES & REG. SERVICES

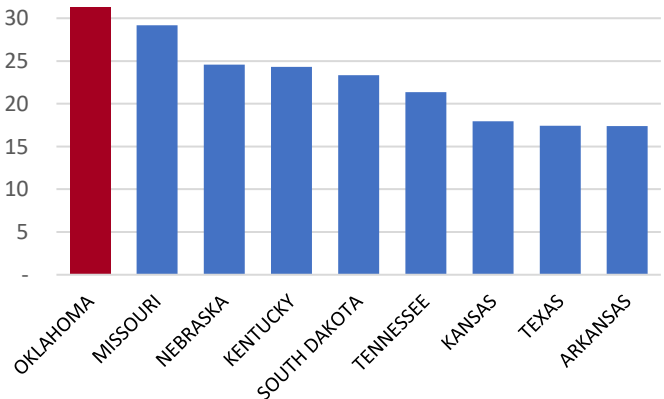
### Oklahoma is Top Eleven in Ag Production, 2020

Commodity Produced (in \$) and Beef Cattle Livestock Inventory	US Rank
Rye	4
Beef Cattle	4
Sorghum	4
Canola	5
Goats	5
Pecans	5
Wheat	6
Hogs	6
Peanuts	10
Hay	11

Farming Statistics (2017 Census of Agriculture)	Value	US Rank
Number of Farms	78,531	4
Average Size of Farm	435 acres	15
Harvested Cropland	7,812,594 acres	15
Market Value of Agricultural Products Sold	\$7.466 billion	22
Market Value of Livestock, Poultry Products	\$5.949 billion	11
Government Payments	\$232 million	14

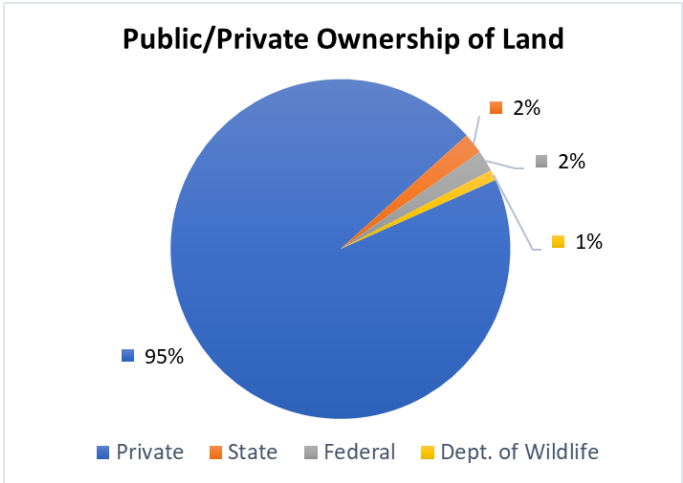
### Oklahoma is Number One in the Nation in Beef Cattle Density

Beef Cattle per square mile  
January, 2021



## NATURAL RESOURCES & REG. SERVICES

### 95% of Land in Oklahoma is Privately Owned



Source: ODWC

Another state agency that is often associated with the work of the NRRS subcommittee is the Oklahoma Department of Wildlife Conservation (ODWC), even though it is a non-appropriated agency.

### Wildlife Department Revenues and Expenditures (Millions)

Revenues	FY'20-FY'21			
	FY 2020	FY 2021	Change	% Change
License Sales	\$22.12	\$25.07	\$2.95	13.3%
Federal Wildlife & Sportfish Restoration Grants	\$29.22	\$23.94	(\$5.28)	-18.1%
Interest Income	\$4.96	\$0.33	(\$4.63)	-93.3%
Other Wildlife Sales	\$3.80	\$3.81	\$0.01	0.3%
Agriculture and Oil Leases	\$1.39	\$1.55	\$0.16	11.5%
Miscellaneous Income	\$2.31	\$5.65	\$3.34	144.6%
<b>Total Revenues</b>	<b>\$63.80</b>	<b>\$60.35</b>	<b>(\$3.45)</b>	<b>-5.4%</b>
<b>Expenditures</b>				
Fisheries Division	\$10.53	\$10.21	(\$0.32)	-3.0%
Wildlife Division	\$13.11	\$13.29	\$0.18	1.4%
Law Enforcement Division	\$12.21	\$9.91	(\$2.30)	-18.8%
Administration	\$9.07	\$11.19	\$2.12	23.4%
Information and Education Division	\$2.84	\$2.97	\$0.13	4.6%
Capital Expenditures	\$17.51	\$8.20	(\$9.31)	-53.2%
<b>Total Expenditures</b>	<b>\$65.27</b>	<b>\$55.77</b>	<b>(\$9.50)</b>	<b>-14.6%</b>

## NATURAL RESOURCES & REG. SERVICES

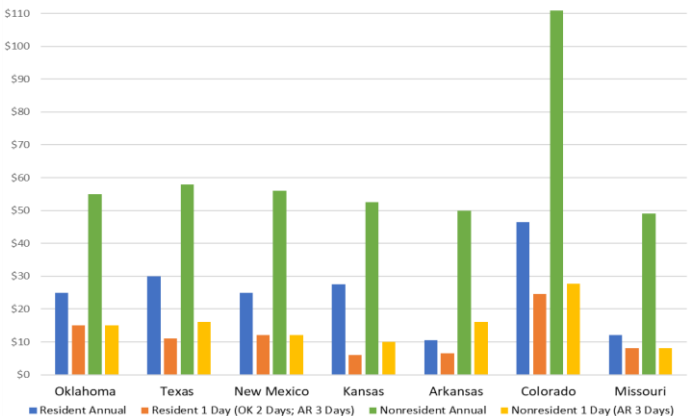
### Oklahoma Hunting and Fishing Licenses, By the Numbers

License	FY'20 licenses sold	FY'20 Revenue	FY'21 Licenses Sold	FY'21 Revenue	Change In Revenue	% Change in Licenses Sold
Resident Combination	19,765	\$810,365	20,102	\$824,182	\$13,817	1.7%
Resident Fishing	215,086	\$5,162,064	179,519	\$4,308,456	-\$853,608	-16.5%
Resident Hunting	38,674	\$928,176	40,213	\$965,112	\$36,936	4.0%
Resident 2-Day Fishing	4,907	\$68,698	4,825	\$67,550	-\$1,148	-1.7%
Resident 5-Year Combination	3,160	\$464,520	3,651	\$536,697	\$72,177	15.5%
Resident 5-Year Fishing	6,800	\$591,600	7,300	\$635,100	\$43,500	7.4%
Resident 5-Year Hunting	826	\$71,862	947	\$82,389	\$10,527	14.6%
<b>Total Resident Licenses*</b>	<b>289,218</b>	<b>\$8,097,285</b>	<b>256,557</b>	<b>\$7,419,486</b>	<b>\$36,180</b>	<b>-11.3%</b>
Lifetime Combination (Includes Veterans)	2,685	\$2,080,875	3,544	\$2,746,600	\$665,725	32.0%
Lifetime Hunting	297	\$185,625	330	\$206,250	\$20,625	11.1%
Lifetime Fishing	1,724	\$387,900	2,234	\$502,650	\$114,750	29.6%
<b>Total Lifetime Licenses*</b>	<b>4,706</b>	<b>\$2,654,400</b>	<b>6,108</b>	<b>\$3,455,500</b>	<b>\$801,100</b>	<b>29.8%</b>
Nonresident Hunting	6,086	\$858,126	7,992	\$1,126,872	\$268,746	31.3%
Nonresident 5-Day Hunting	10,833	\$801,642	13,365	\$988,935	\$187,293	23.4%
Nonresident Fishing	44,279	\$2,391,066	47,921	\$2,587,734	\$196,668	8.2%
Nonresident Short Term Fishing	358	\$32,220	402	\$36,180	\$3,960	12.3%
<b>Total Nonresident Licenses*</b>	<b>61,556</b>	<b>\$4,083,054</b>	<b>69,680</b>	<b>\$4,739,721</b>	<b>\$656,667</b>	<b>13.2%</b>

Source: OK Department of Wildlife Commission Annual Report

\*Total of selected and listed licenses. The Department issues over 140 different licenses, permits, and tags. The Department sold a total of 1,133,579 units with a gross revenue of \$27,248,095 in 2021, an increase of 10.2% and \$2,520,000 respectively from 2020.

### Cost to Fish in OK and Surrounding States



Source: ODWC, TP&WD, NMDGF, KDWP, AGFC, CPW, and MDC

## NATURAL RESOURCES & REG. SERVICES

### 2021 Resident Cost to Hunt (Taking of One Animal)

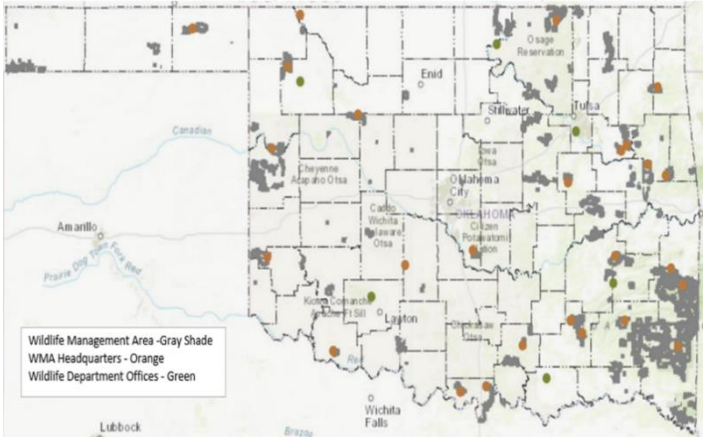
Game	Deer	Waterfowl	Turkey	Antelope
Oklahoma	\$45.00	\$60.00	\$35.00	\$76.00
Arkansas	\$10.50	\$42.50	\$25.00	N/A
Kansas	\$80.00	\$66.50	\$55.00	\$90.00
Texas	\$25.00	\$57.00	\$32.00	N/A

### 2021 Nonresident Cost to Hunt (Taking of One Animal)

Game	Deer	Waterfowl	Turkey	Antelope
Oklahoma	\$300.00	\$177.00	\$152.00	\$306.00
Arkansas	\$55.00	\$115.00	\$55.00	N/A
Kansas*	\$540.00	\$136.50	\$150.00	\$400.00
Texas	\$315.00	\$347.00	\$332.00	N/A

\*Archery only for nonresidents hunting antelope in Kansas.

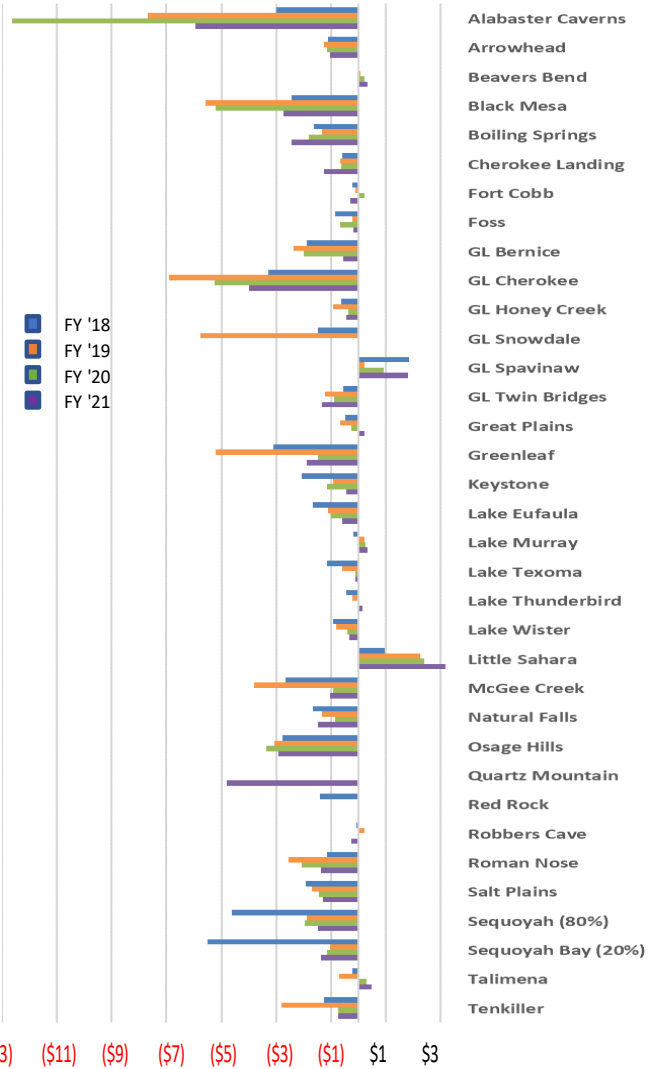
Source: ODWC, TP&WD, KDWPT, and AGFC



Energy & Environment Statistics	Value	US Rank
Per Capita Energy Consumed (2019)	423 million Btu	10
Average Retail Price of Electricity (2019)	7.86 cents/kWh	50
Total Energy Production (2019)	5,233 trillion Btu	4
Total CO2 Emissions (2018)	98.1 million metric tons	19
Per Capita Gasoline Expenditures	\$1,164	28
Natural gas production	3,1775,008 million cu ft	4
Crude oil production	390 thousand barrels per day	5

# NATURAL RESOURCES & REG. SERVICES

## Oklahoma State Parks Net Revenue Per Visitor



Source: OTRD

NOTES:

Sequoyah Bay is operated within Sequoyah State Park.

Alabaster Caverns collapsed in 2018.

FY19 includes substantial flooding and reduced visitation.

FY20 includes increased visitation from pandemic.

Capital and overhead costs not included.

## NATURAL RESOURCES & REG. SERVICES

### Oklahoma State Parks & Recreation Facts and Figures

#### State Park Revenues and Visitation

Park Visitors	11.5 million
Lodge Occupancy Rates	29%
Revenue As a Percent of Expenditures	61%
Concession Revenue	\$1,428,032

#### State Park Lands and Facilities

Number of State Parks	32
Number of Acres in the System	60,000
Number of Structures Maintained	over 500
Number of Golf Courses	7
Annual Required Maintenance Costs	\$39,308,000

#### Recreational Vehicle Registrations by Type (2020)

ATVs, UTVs, and off-road motorcycles	15,389
Boat (one year)	90,098
Boat (three year)	45,216
Classic cars (one year)	1,257
Classic cars (ten year)	190
Former military vehicle	10



## NATURAL RESOURCES & REG. SERVICES

### Oklahoma Water Facts

#### Surface Water

Water Surface Area	1,401 Square Miles
Water Surface (% of state total)	2%
Length of Rivers and Streams	167,600 Miles
Longest River	North Canadian - 752 Miles
Largest Lake (surface area)	Eufaula - 164 square Miles
Largest Lake (volume)	Texoma - 2.6 million Acre Feet
Deepest Lake	W.R. Holway - 182.4 Feet

#### Groundwater

Major Groundwater Basins	22
Amount of Groundwater	390 million Acre Feet
Largest Groundwater Basin	Ogallala - 90 million Acre Feet

#### Precipitation

Highest Average Annual Precipitation	McCurtain County - 51.89 Inches
Lowest Average Annual Precipitation	Cimarron County - 18.25 Inches
Statewide Average (Mesonet Stations)	33.94 Inches

#### Water Use

Total Water Use (2007)	1,814,762 Acre-Feet
Source of Use	1. Surface Water (56%) 2. Groundwater (44%)
Top 3 Uses (% of total)	1. Crop Irrigation (41%) 2. Public Water Supply (32%) 3. Livestock and Aquaculture (12%)

- Groundwater accounts for 73% of total irrigation water use.
- 54% of Oklahoma's surface water use is for public water supply.
- Approximately 10.5 million acre-feet of water flows into Oklahoma through its two major river basins, the Red and Arkansas, annually.
- About 36 million acre-feet flows out of Oklahoma annually.

## **PUBLIC SAFETY & JUDICIARY**

The Public Safety & Judiciary (PS&J) Subcommittee is comprised of fourteen agencies:

- Alcoholic Beverage Laws Enforcement (ABLE) Comm.
- Attorney General
- Department of Corrections (DOC)
- Court of Criminal Appeals
- District Attorneys and District Attorney's Council (DAC)
- District Courts
- Indigent Defense System
- OK State Bureau of Investigation (OSBI)
- Council on Law Enforcement Education and Training (CLEET)
- Office of Chief Medical Examiner
- OK Bureau of Narcotics and Dangerous Drugs (OBND)
- Pardon and Parole Board
- Department of Public Safety (DPS)
- Supreme Court

### **PS&J Subcommittee Total Appropriations FY 2013 -2022**

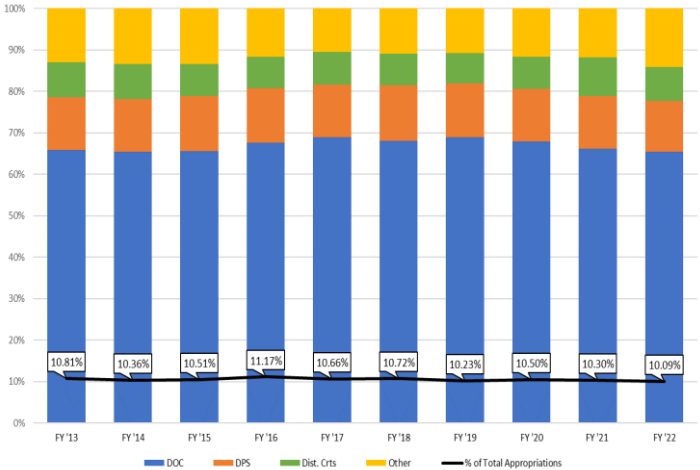
FY 2013	\$737,909,277
FY 2014	\$761,629,275
FY 2015	\$758,061,558
FY 2016	\$769,442,229
FY 2017	\$742,701,611
FY 2018	\$750,268,259
FY 2019	\$788,710,042
FY 2020	\$876,481,437
FY 2021	\$848,984,317
FY 2022	\$891,232,291

The appropriation figures include any supplementals, and account for any major revenue failures whether in general revenue appropriations or in dedicated sources.

The following graph shows what percent of the subcommittee's appropriation goes to specific agencies, along with what percent of total appropriations goes to the PS&J subcommittee.

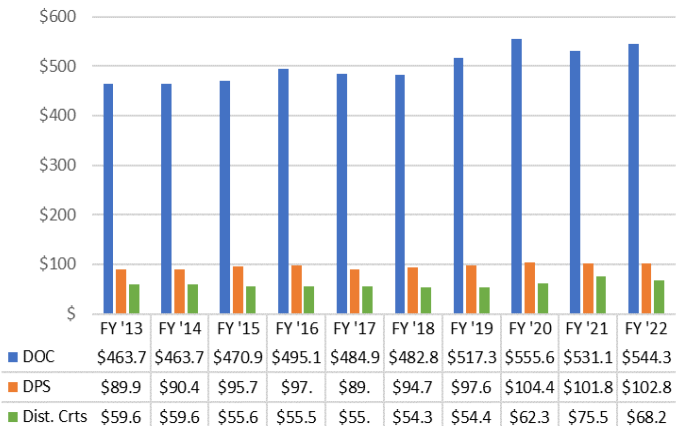
## PUBLIC SAFETY & JUDICIARY

### PS&J Subcommittee FY 2013 – 2022



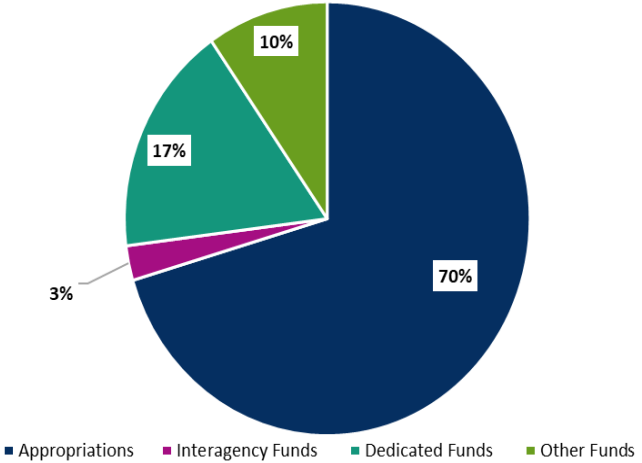
- PS&J contains two of the top 12 highest appropriated agencies- Department of Corrections and Department of Public Safety.
- The Department of Corrections and Department of Public Safety account for approximately 7.3% of all appropriated dollars in FY'22.

### Top 3 PS&J Agencies Appropriations, FY 2013 – 2022 (in Millions)

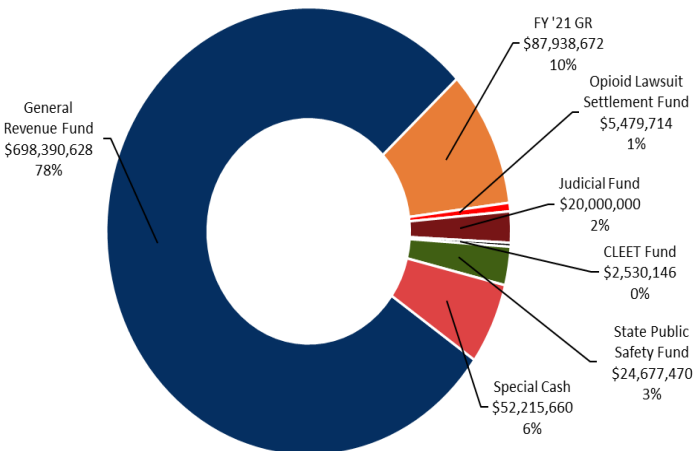


## PUBLIC SAFETY & JUDICIARY

### PS&J FY'22 Budget by Source



### PS&J FY'22 State Appropriation by Source

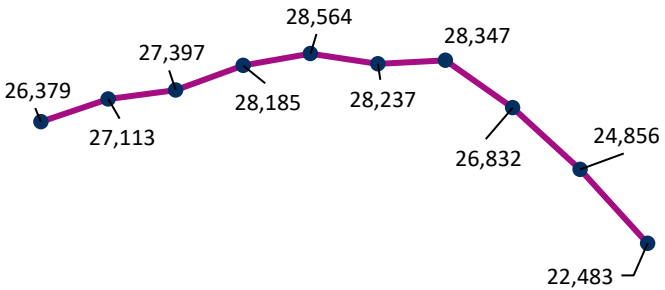


## PUBLIC SAFETY & JUDICIARY

### Department of Corrections

- DOC is the 6th largest state agency in appropriations and accounts for approximately 6% of all appropriated dollars in FY'22.
- DOC was appropriated \$544.3 million for FY'22, an increase of \$13.2 million, (2.48%) from FY'21.
- The agency is funded by appropriations (90.2%), revolving funds (9.3%), and federal funds (0.5%).

### Incarcerated Inmates\* FY 2012 – 2021



FY-12 FY-13 FY-14 FY-15 FY-16 FY-17 FY-18 FY-19 FY-20 FY-21

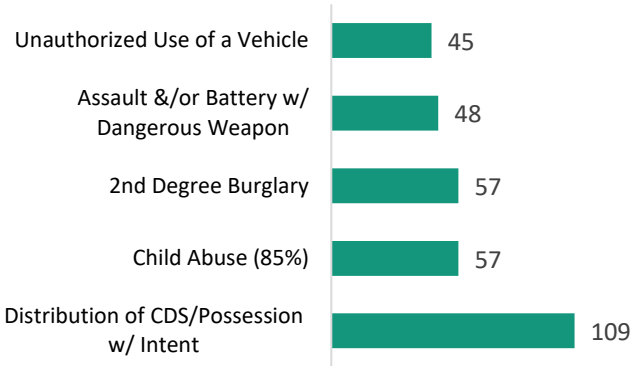
\*Inmates in custody and sentenced inmates awaiting reception in county jails

Recent criminal justice reform measures that have had an impact on DOC receptions and overall prison population include:

- State Question 780 (2016)- reclassified certain non-violent drug- and theft-related crimes from felonies to misdemeanors.
- HB 2286 (2018)- established administrative and ageing prisoner parole.
- HB 1269 (2019)- applied the provisions of SQ780 retroactively and allowed for an accelerated single stage commutation docket
- SB 320 (2021) - provides for the medically frail and medically vulnerable to receive consideration in compassionate parole proceedings.

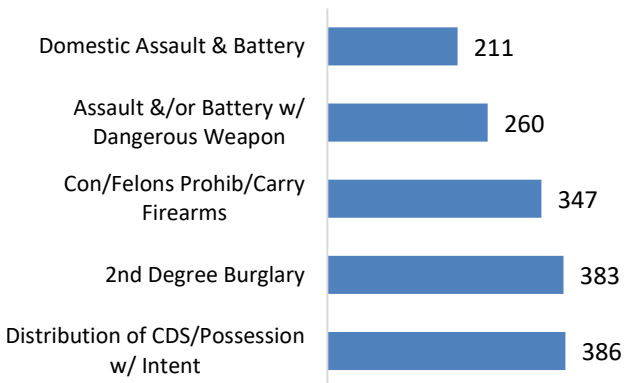
## PUBLIC SAFETY & JUDICIARY

### FY '21 Receptions: Top 5 Controlling Offenses for Female Offenders



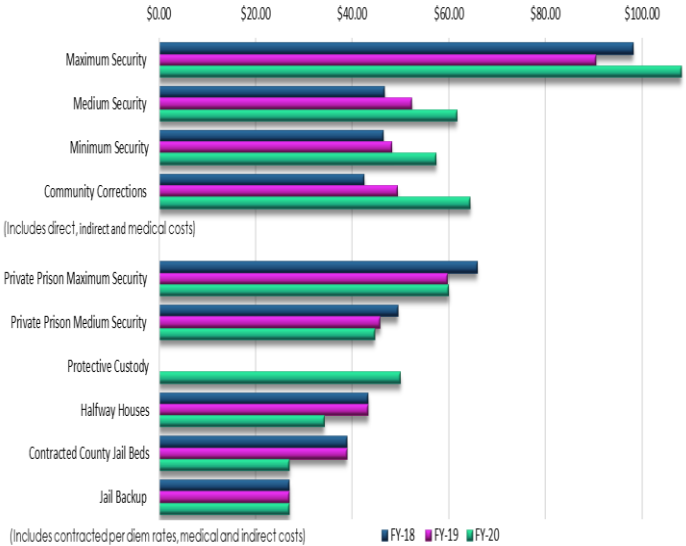
(CDS – Controlled Dangerous Substance)

### FY '21 Receptions: Top 5 Controlling Offenses for Male Offenders

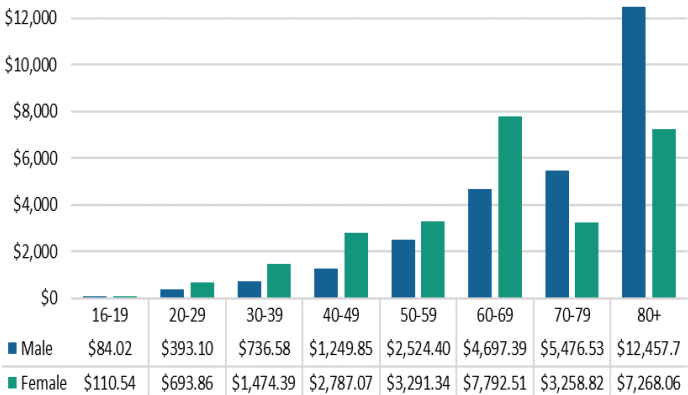


## PUBLIC SAFETY & JUDICIARY

### Average Daily Cost of Incarceration, FY 2018 to FY 2020

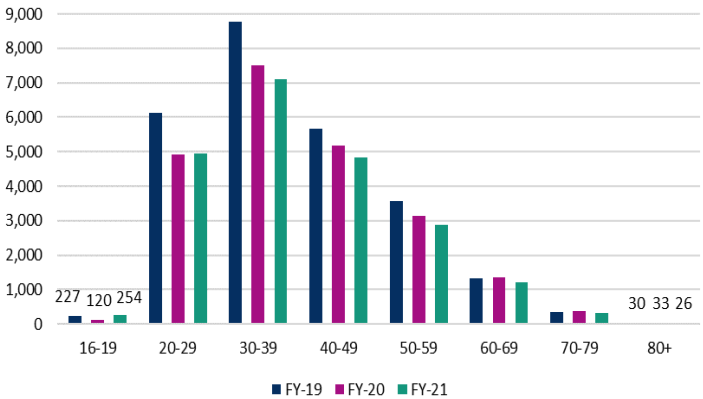


### FY 2021 Average Cost Per Inmate by Age Group and Gender



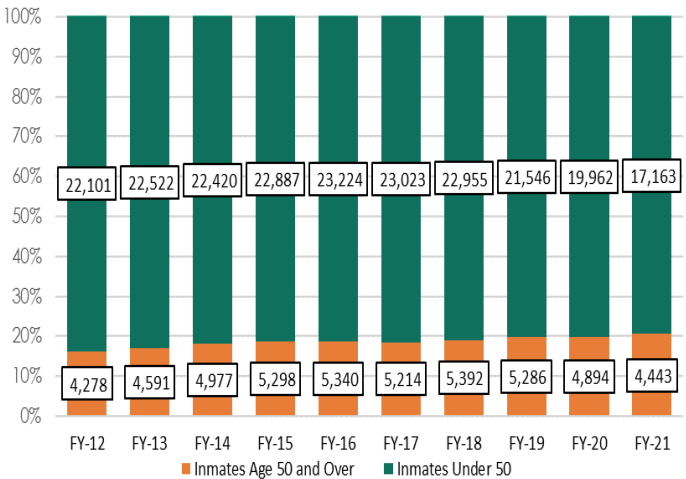
## PUBLIC SAFETY & JUDICIARY

### Inmate Population by Age, FY 2019 to FY 2021



- The average age for female inmates is 37.
- The average age for male inmates is 40.

### Ageing Population FY 2012 – 2021



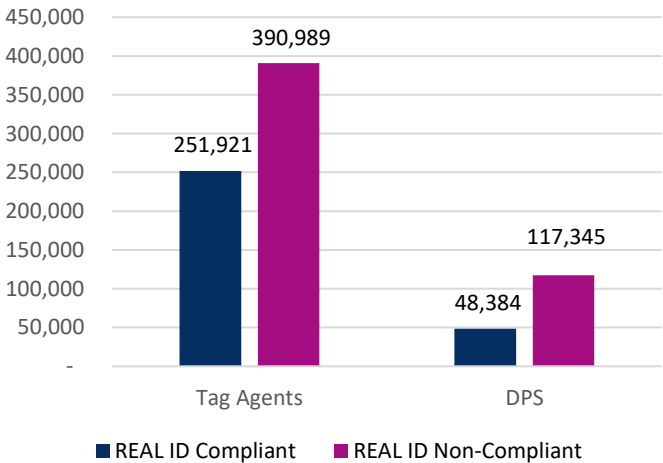


## PUBLIC SAFETY & JUDICIARY

### Department of Public Safety

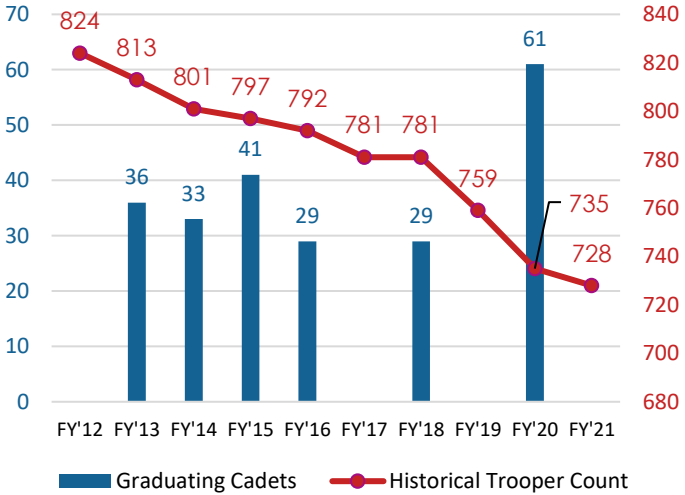
- DPS is the 9th largest state agency in appropriations and accounts for 1% of all appropriated dollars in FY'22.
- DPS was appropriated \$102.9 million for FY'22, an increase of \$7.6 million (8.01%) from FY'21.
- DPS is funded by appropriations from the General Revenue Fund (40.04%), the State Public Safety Fund (12.64%), revolving funds (36.03%) and federal/other funds (11.29%).

### FY '21 License and ID Issuance



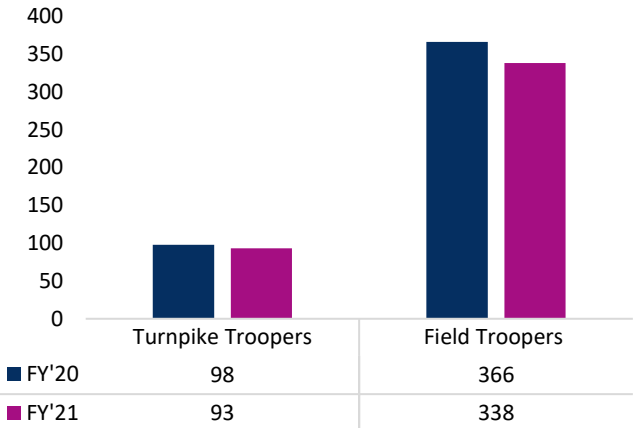
## PUBLIC SAFETY & JUDICIARY

### Trooper Academy Graduating Classes vs Historical Trooper Count, FY 2012 – 2021



- An academy was not held in FY'12, FY'17, FY'19 or FY'21.
- Since FY'13, DPS has averaged a net loss of 11 troopers each fiscal year.

### State Trooper Assignments\*



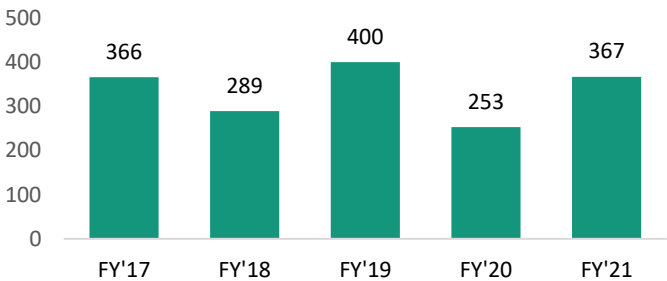
\*Does not include Lieutenants or Captains

## PUBLIC SAFETY & JUDICIARY

### Council on Law Enforcement Education and Training

- CLEET was appropriated \$3.7 million for FY'22, an increase of \$290,746 (8.01%) from FY'21.
- CLEET is funded by appropriations from the General Revenue Fund (17.9%), the CLEET Fund (39.9%), and revolving funds (42.2%).

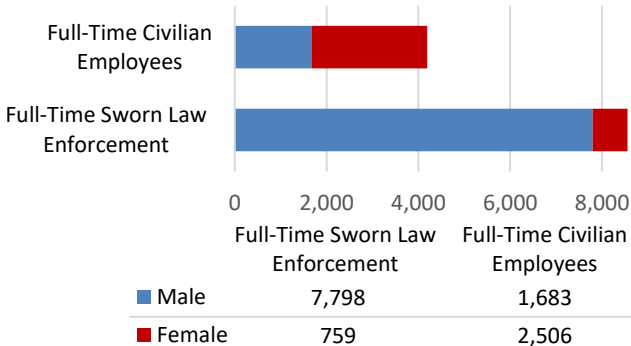
### CLEET Academy Graduated and Certified Cadets



(Certified cadets are those who have completed the academy, graduated, and passed the certification exam.)

- In 2020, Oklahoma's law enforcement rate was 3.2 per 1,000 residents; in 2019 it was 3.3 per 1,000 residents.

### 2020 Law Enforcement Employee Data



Full-time sworn personnel include persons who perform guard or protection duties and who are not paid from police funds (school crossing guards, special officers, and merchant police) as well as those with full arrest power, including the chief, sheriff, commissioner, and superintendent.

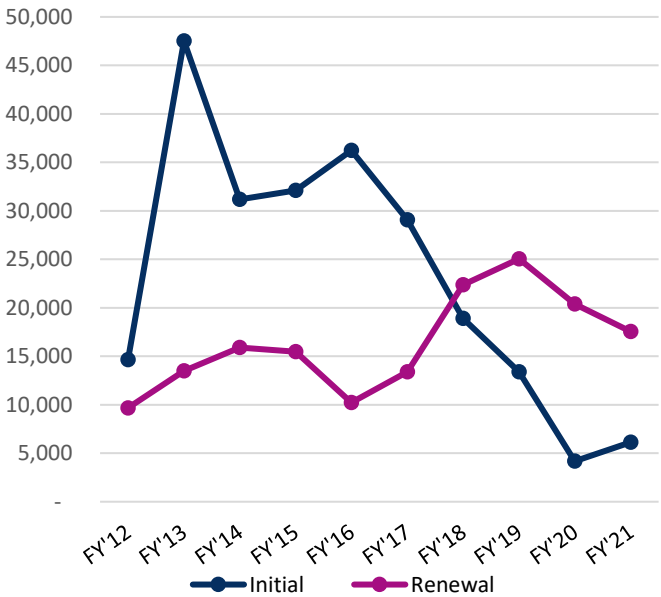
Civilian employees include clerks, radio dispatchers, meter maids, stenographers, mechanics, etc.

## PUBLIC SAFETY & JUDICIARY

### Oklahoma State Bureau of Investigations (OSBI)

- OSBI was appropriated \$19.3 million for FY'22, an increase of \$3.3 million (21%) from FY'21.
- OSBI is funded by appropriations (39.4%), revolving funds (48.4%), and federal/other funds (12.2%).
- OSBI is Oklahoma's firearms licensing authority and is responsible for implementing the provisions of the Oklahoma Self-Defense Act (SDA).

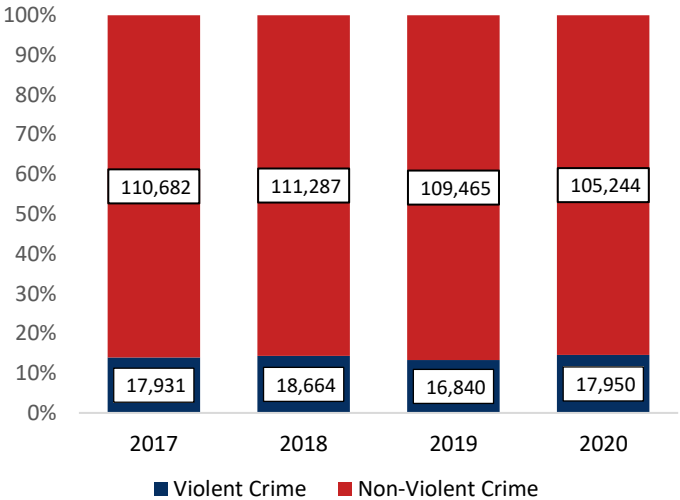
### Issued SDA Licenses by Type FY 2012 to 2021



- The revenue generated from SDA licenses is used to maintain the SDA program, any additional revenue is utilized throughout the agency as needed.
- HB 2597 (2019) established “permit less carry” allowing those over the age of 21 or those 18 years old and in the military, that can legally own a firearm, to carry openly or concealed without a permit.

## PUBLIC SAFETY & JUDICIARY

### Crime Trends 2017 – 2020



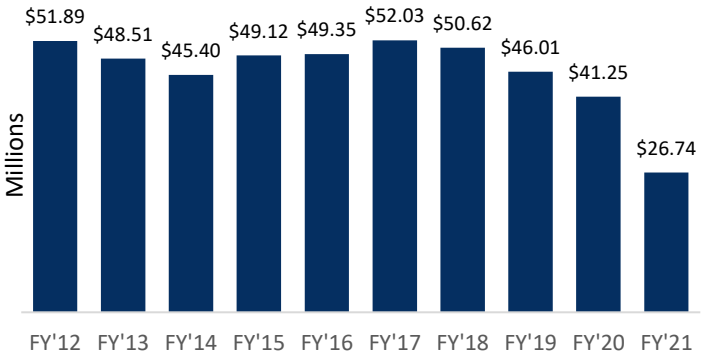
Between 2017 and 2020 violent crime in Oklahoma increased 0.11% and non-violent crime decreased 4.91%. Overall, crime has decreased 4.21% during that same time.

### District Courts

- The District Courts were appropriated \$67.9 million for FY'21; however, a revenue failure of about \$10 million in the State Judicial Fund resulted in the District Courts receiving a supplemental of \$7.5 million.
- The agency's total FY'22 appropriation was \$68.2 million, an increase of \$260,715 (0.38%) from FY'21's original appropriation.
- The District Courts are funded by Special Cash (70%), the State Judicial Fund (28.2%), and revolving/other funds (3.8%).
- 99.4% of the District Courts' budget is used for payroll and benefits.
- The Administrative Office of the Courts is responsible for the administration and operation of the District Courts.

## PUBLIC SAFETY & JUDICIARY

### State Judicial Fund Collections FY 2012 – 2021 (in millions)



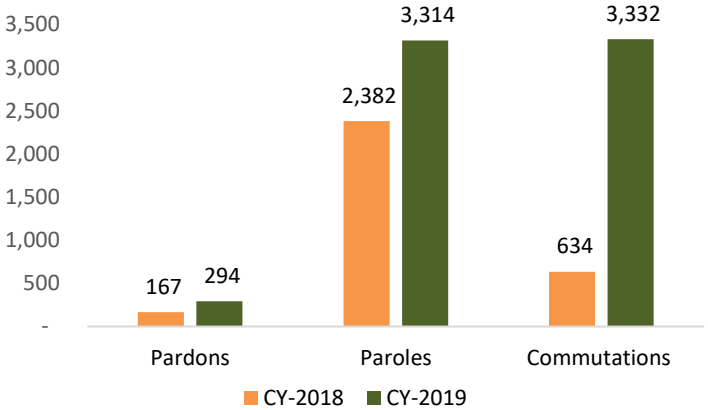
- The State Judicial Fund consists of 80% of net Court Fund Collections from the 77 District Courts.
- A supplemental appropriation of \$7.5 million was provided for FY'21 to offset significant decreases in State Judicial Fund collections.
- Between FY'17 and FY'21 State Judicial Fund collections have declined 48.6%.

### Pardon and Parole Board

- The Pardon and Parole Board was appropriated \$2.3 million for FY'22, representing no change from FY '21.
- The Pardon and Parole Board is funded 100% by appropriations.
- In 2019, 760 parole cases were docketed through Administrative Parole and 892 were docketed through HB 1269's accelerated single stage commutation docket.
- In 2019, 525 parole cases were recommended through Administrative Parole and 527 cases were recommended through HB 1269's accelerated single stage commutation docket.
- Favorable recommendations are for January through November of the respective year.

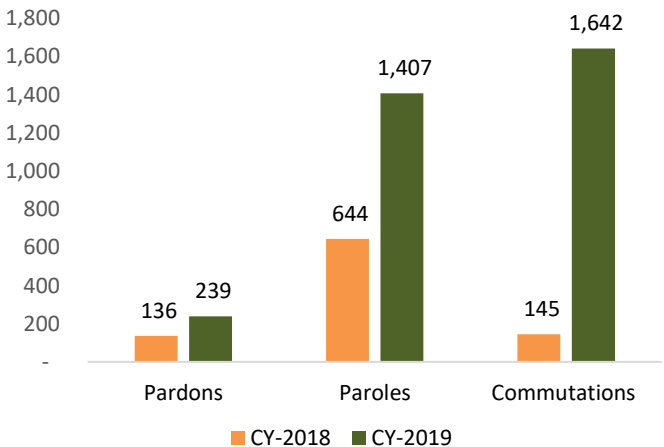
## PUBLIC SAFETY & JUDICIARY

### Docketed Cases Calendar Year 2018 -2019



\*\*As of 10/13/21, the Pardon and Parole Board has not provided the Legislature updated data for docketed cases or favorable recommendations.

### Favorable Recommendations Calendar Year 2018 -2019



## STATE RETIREMENT PLANS

### State of Oklahoma Pension Systems

Oklahoma has 7 governmental retirement pension plans:

- Teachers' Retirement System of Oklahoma (OTRS)
- Oklahoma Public Employees Retirement System (OPERS)
- Oklahoma Firefighters Pension and Retirement System
- Oklahoma Police Pension and Retirement System
- Oklahoma Law Enforcement Retirement System (OLERS)
- Oklahoma Uniform Retirement System for Justices and Judges
- Retirement Plan for Full-Time Employees of the Department of Wildlife Conservation

### Actuarial Funding Positions of State Pensions

<b>Actuarial Funding Positions of State Pensions</b>				
Plan	Actuarial Value of Assets (millions)	Actuarial Accrued Liability (millions)	Unfunded Accrued Liability (millions)	Funded Status as of FY'21
TRS	\$19,330	\$27,034	\$7,704	71.5%
OPERS	\$10,991	\$11,046	\$55	99.5%
Firefighters	\$2,997	\$4,179	\$1,182	71.7%
Police	\$2,940	\$2,810	-\$130	104.6%
OLERS	\$1,152	\$1,272	\$120	90.6%
Judges	\$380	\$342	-\$38	111.1%
Wildlife	<u>\$128</u>	<u>\$138</u>	<u>\$10</u>	<u>92.8%</u>
<b>Total</b>	<b>\$37,918</b>	<b>\$46,821</b>	<b>\$8,903</b>	<b>81.0%</b>

Source: Summary of Actuarial Reports; Oklahoma State Pension Commission

- Total plan liabilities grew by about 2% in FY'21, while actuarial asset values increased by 7.8%.
- Oklahoma's aggregate funded status of the pension plans was 81% in FY'21, compared to the national average of 72%.
- All plans are considered defined benefit plans except two: The Wildlife plan is a defined contribution plan and OPERS is now a defined contribution plan for any employees hired on or after November 1, 2015.

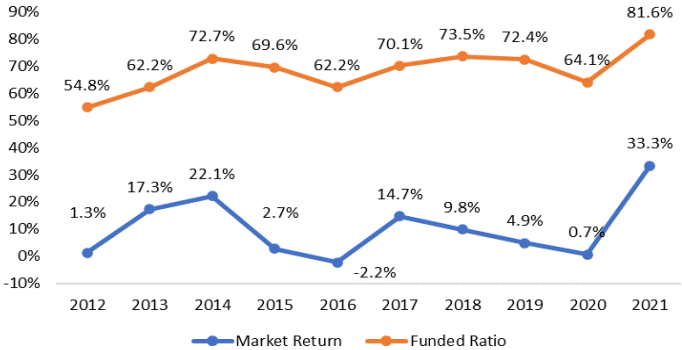


## STATE RETIREMENT PLANS

### Oklahoma Teachers' Retirement System (OTRS)

Active	Retirees	Inactive, vested	Inactive, nonvested
89,945	67,016	13,650	13,562

#### Market Return and Funded Ratio\* 2012 - 2021



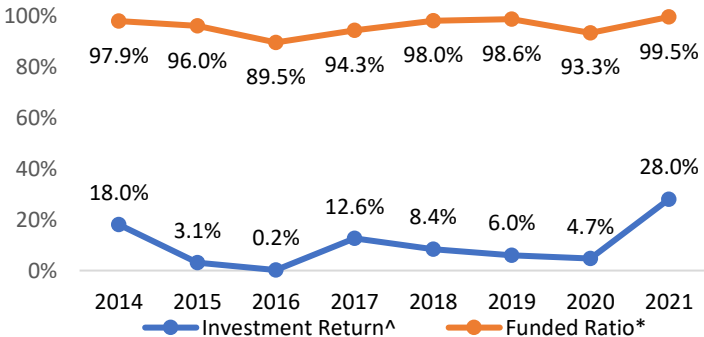
\*Funded ratio based on market value

- 15 Year Average Market Return: -1.48%
- 10 Year Average Market Return: 10.5%
- 5 Year Average Market Return: 12.7%

### Oklahoma Public Employees Retirement System (OPERS)

Active	Retirees	Inactive, vested
31,711	36,351	6,133

#### Investment Return and Funded Ratio 2014 – 2021



<sup>^</sup> Annual money-weighted rate of return, net of investment expense

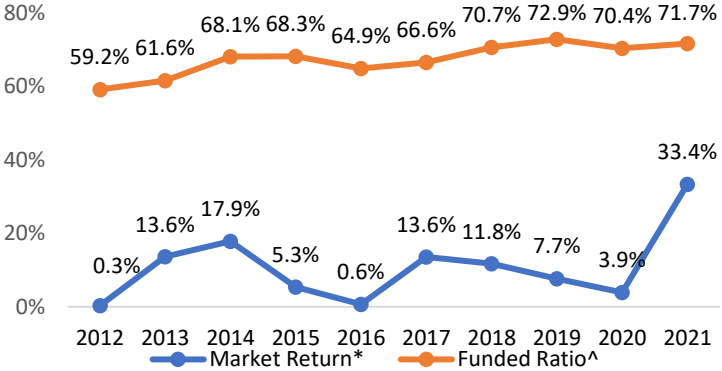
<sup>\*</sup> Ratio of plan fiduciary net position to total pension liability

## STATE RETIREMENT PLANS

### Oklahoma Firefighters Pension and Retirement System

Active, Paid	Active, Volunteer	Inactive, vested	Retired / Disabled	Beneficiaries
4,412	7,828	2,288	9,066	2,620

#### Market Return and Funded Ratio 2012 – 2021



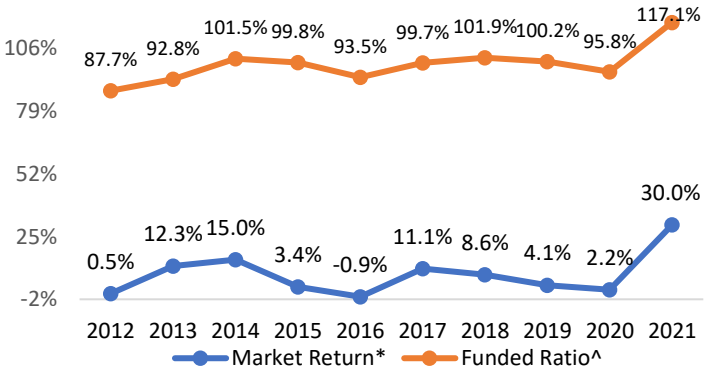
\*2012-2017, Market value return; 2018-2021, Annual return net of investment expenses

^2012-2017, Market value funded ratio; 2018-2021, Plan fiduciary net position as a percentage of the total pension liability

### Oklahoma Police Pension and Retirement System

Active	Retired / Disabled	Beneficiaries	Terminated, Vested
4,920	3,220	862	156

#### Market Return and Funded Ratio 2012 – 2021



\*Investment return, net of fees

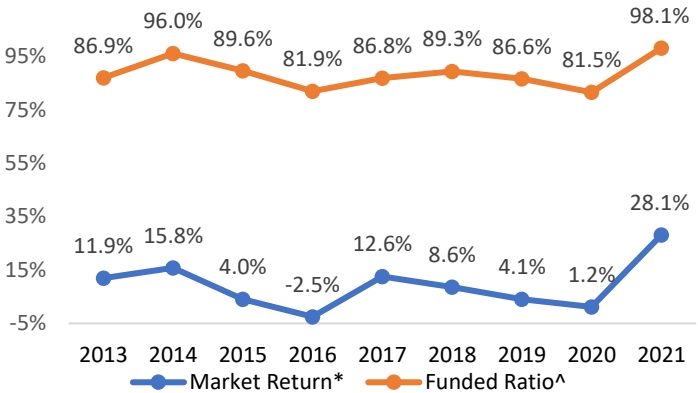
^Plan fiduciary net position as a percentage of the total pension liability

## STATE RETIREMENT PLANS

### Oklahoma Law Enforcement Retirement System (OLERS)

Active	Inactive, vested	Retirees/ Beneficiaries
1,190	37	1,562

#### Market Return and Funded Ratio 2013 – 2021



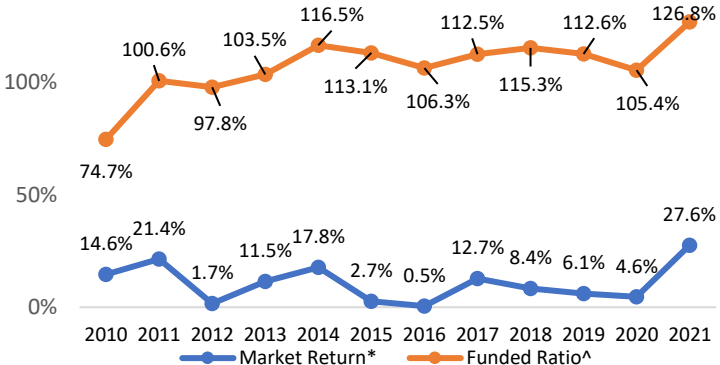
\*Estimated rate of return on market value, Actuary Report

^Market value funded ratio

### Oklahoma Uniform Retirement System for Justices and Judges

Active	Inactive, vested	Retirees/ Beneficiaries
264	17	306

#### Market Return and Funded Ratio 2010 – 2021



\*Estimated rate of return on market value, Actuarial Value Report

^Market value funded ratio

## STATE FACTS & OTHER

### Oklahoma's 58th Legislature

#### Senate

48 Members	9 (18.8%) Democrat	9 (18.8%) Female
	39 (81.2%) Republican	39 (81.2%) Male

President Pro Tempore: Greg Treat, Oklahoma City

Majority Floor Leader: Greg McCortney, Ada

Minority Leader: Kay Floyd, Oklahoma City

Average Legislative Tenure: 4.5 years

#### House of Representatives

101 Members	19 (18.8%) Democrat	22 (21.8%) Female
	82 (81.2%) Republican	78 (77.2%) Male
		1 (1%) Non-Binary

Speaker of the House: Charles McCall, Atoka

Majority Floor Leader: Jon Echols, Oklahoma City

Minority Leader: Emily Virgin, Norman

Average Legislative Tenure: 3.7 Years

Legislation	2021	5 Year Avg
Bills Introduced	3,056	2,507
Bills Sent to Governor	598	485
Bills Enacted	584	468
Length of Session (Days)	66	57

## STATE FACTS & OTHER

Statehood	November 16th, 1907
Nickname	Sooner State
Capital	Oklahoma City
Population	3,959,353
Area	69,899 square miles
Largest City	Oklahoma City - 681,054
State Song	<i>Oklahoma!</i>
State Flower	Mistletoe
State Tree	Redbud
State Bird	Scissortailed Flycatcher
Highest Point	Black Mesa - 4,973 ft
Lowest Point	Little River (AR border) - 287 ft

Cities and Counties	
Number of Cities and Towns	742
Largest City	Oklahoma City - 681,054
Smallest Town	Cooperton - 3
Number of Counties	77.0
Largest County	Oklahoma - 796,292
Smallest County	Cimarron - 2,296

Source: U.S. Census Bureau

[https://www.oklahoma-demographics.com/cities\\_by\\_population](https://www.oklahoma-demographics.com/cities_by_population)

## STATE FACTS & OTHER

### Oklahoma's 20 Largest Cities

City	2010 Census Population	2010 Rank	2020 Census Population	2020 Rank	2010- 2020 Change	% Change
Oklahoma City	580,462	1	681,054	1	100,592	17.3%
Tulsa	392,004	2	413,066	2	21,062	5.4%
Norman	110,911	3	128,026	3	17,115	15.4%
Broken Arrow	98,837	4	113,540	4	14,703	14.9%
Edmond	81,130	6	94,428	5	13,298	16.4%
Lawton	96,867	5	90,381	6	-6,486	-6.7%
Moore	55,082	7	62,793	7	7,711	14.0%
Midwest City	54,370	8	58,409	8	4,039	7.4%
Enid	49,385	9	51,308	9	1,923	3.9%
Stillwater	45,721	10	48,394	10	2,673	5.8%
Owasso	29,884	14	38,240	11	8,356	28.0%
Bartlesville	35,734	12	37,290	12	1,556	4.4%
Muskogee	39,181	11	36,878	13	-2,303	-5.9%
Shawnee	29,825	13	31,377	14	1,552	5.2%
Bixby	20,912	20	28,609	15	7,697	36.8%
Jenks	16,938	28	25,949	16	9,011	53.2%
Ardmore	24,469	16	24,725	17	256	1.0%
Ponca City	25,387	15	24,424	18	-963	-3.8%
Yukon	22,706	18	23,630	19	924	4.1%
Duncan	23,431	17	22,692	20	-739	-3.2%

Source: Census Bureau

## STATE FACTS & OTHER

County	2020 Census Population	County Seat	2020 Census Population
Adair	19,495	Stilwell	3,700
Alfalfa	5,699	Cherokee	1,476
Atoka	14,143	Atoka	3,195
Beaver	5,049	Beaver	1,280
Beckham	22,410	Sayre	4,809
Blaine	8,735	Watonga	2,690
Bryan	46,067	Durant	18,589
Caddo	26,945	Anadarko	5,745
Canadian	154,405	El Reno	16,989
Carter	48,003	Ardmore	24,725
Cherokee	47,078	Tahlequah	16,209
Choctaw	14,204	Hugo	5,166
Cimarron	2,296	Boise City	1,166
Cleveland	295,528	Norman	128,026
Coal	5,266	Coalgate	1,667
Comanche	121,125	Lawton	90,381
Cotton	5,527	Walters	2,412
Craig	14,107	Vinita	5,193
Creek	71,754	Sapulpa	21,929
Custer	28,513	Arapaho	668
Delaware	40,397	Jay	2,425
Dewey	4,484	Taloga	288
Ellis	3,749	Arnett	495
Garfield	62,846	Enid	51,308
Garvin	25,656	Pauls Valley	5,992
Grady	54,795	Chickasha	16,051
Grant	4,169	Medford	932
Greer	5,491	Mangum	2,762
Harmon	2,488	Hollis	1,795
Harper	3,272	Buffalo	1,039
Haskell	11,561	Stigler	2,677

## STATE FACTS & OTHER

County	2020 Census Population	County Seat	2020 Census Population
Hughes	13,367	Holdenville	5,934
Jackson	24,785	Altus	18,729
Jefferson	5,337	Waurika	1,837
Johnston	10,272	Tishomingo	3,101
Kay	43,700	Newkirk	2,172
Kingfisher	15,184	Kingfisher	4,903
Kiowa	8,509	Hobart	3,413
Latimer	9,444	Wilburton	2,285
Le Flore	48,129	Poteau	8,807
Lincoln	33,458	Chandler	2,858
Logan	49,555	Guthrie	10,749
Love	10,146	Marietta	2,719
Major	7,782	Fairview	2,740
Marshall	15,312	Madill	3,914
Mayes	39,046	Pryor Creek	9,444
McClain	41,662	Purcell	6,651
McCurtain	30,814	Idabel	6,961
McIntosh	18,941	Eufaula	2,766
Murray	13,904	Sulphur	5,065
Muskogee	66,339	Muskogee	36,878
Noble	10,924	Perry	4,484
Nowata	9,320	Nowata	3,517
Okfuskee	11,310	Okemah	3,074
Oklahoma	796,292	Oklahoma City	681,054
Okmulgee	36,706	Okmulgee	11,322
Osage	45,818	Pawhuska	2,984
Ottawa	30,285	Miami	12,969
Pawnee	15,553	Pawnee	1,936
Payne	81,646	Stillwater	48,394
Pittsburg	43,773	McAlester	18,171
Pontotoc	38,065	Ada	16,481



## STATE FACTS & OTHER

County	2020 Census Population	County Seat	2020 Census Population
Pottawatomie	72,454	Shawnee	31,377
Pushmataha	10,812	Antlers	2,221
Roger Mills	3,442	Cheyenne	771
Rogers	95,240	Claremore	19,580
Seminole	23,556	Wewoka	3,133
Sequoyah	39,281	Sallisaw	8,510
Stephens	42,848	Duncan	22,692
Texas	21,384	Guymon	12,965
Tillman	6,968	Frederick	3,468
Tulsa	669,279	Tulsa	413,066
Wagoner	80,981	Wagoner	7,621
Washington	52,455	Bartlesville	37,290
Washita	10,924	New Cordell	2,775
Woods	8,624	Alva	5,028
Woodward	20,470	Woodward	12,133

Source: Census Bureau; Oklahoma Historical Society

Policy Area - Tax and Government			US Rank
Per Capita State and Local Government Expenditures	2017	\$8,851.00	43rd
Per Capita State and Local Government Tax Revenue	2017	\$3,544.00	46th
State Tax Rate On Gasoline	2020	\$0.20	42nd
Per Capita State Income Tax Liability	2018	\$886.00	32nd
Per Capita State and Local Gov Debt	2017	\$4,759.00	47th
Per Capita State and Local Revenue from Fed. Gov.	2017	\$1,947.00	33rd
State and Local Tax Burden as a % of Income	2017	7.10%	44th

Source: State Rankings 2020, pgs., 315, 303, 341, 334, 371, 297, 313

## STATE FACTS & OTHER

Policy Area - Education			US Rank
% of School-Age Population in Public Schools	2018	99.9	5th
Public Elementary and Secondary School Districts	2017	513.0	9th
Public Elementary and Secondary School	2018	1,800.0	21st
Enrollment in Public Elem. & Secondary Schools	2018	695,092.0	26th
Public Elem. And Secondary School Teachers	2018	41,597.0	27th
% of Population Graduated from High School	2018	88.4	34th
ACT Composite Score	2019	18.9	45th
Avg. Student Costs at Public Institutions of Higher Ed.	2018	16,263.0	43rd
Avg. College Debt	2018	25,221.0	38th
% of College Graduates with Debt	2018	47.0	43rd
Institutions of Higher Education	2018	59.0	28th
Enrollment in Institutions of Higher Ed.	2017	202,051.0	31st

Source: State Rankings 2020, pgs., 115-116, 119-121, 129, 135, 147, 149-152

Policy Area - Health and Human Services			US Rank
% of Population Not Covered by Health Insurance	2018	14.2	2nd
Community Hospitals per 100,000	2017	3.3	9th
Births per 100,000	2018	12.6	8th
Teen Birth Rate, % of All Births	2018	7.0	6th
Deaths	2017	40,452.0	26th
Est. Cancer Deaths	2020	8,430.0	26th
Deaths by Accident	2017	2,563.0	26th
Heart Disease Deaths	2017	10,772.0	23rd
Suicide Deaths	2017	756.0	25th
% of Adults Overweight or Obese	2018	69.6	7th
% of Children 19-35 Months Fully Immunized	2017	67.3	43rd
% of Population in Poverty	2018	15.6	8th
% of Children Living in Poverty	2018	21.3	10th
Per Capital Social Security Payments	2018	3,072.0	28th
% of Population Receiving Public Aid	2018	2.8	20th

Source: State Rankings 2020, pgs. 381, 388, 390, 392, 399, 401, 405, 409, 411, 417-418, 519, 521, 528, 542

## STATE FACTS & OTHER

Policy Area - Public Safety and Judiciary			
Total Crimes	2018	131,744.0	24th
Crime Rate per 100,000	2018	3,341.1	7th
Violent Crimes	2018	18,380.0	23rd
Violent Crime Rate per 100,000	2018	466.1	12th
Murders	2018	206.0	25th
Murder Rate per 100,000	2018	5.2	19th
Reported Arrest Rate per 100,000	2018	2,626.3	39th
State Prisoners Imprisonment Rate per 100,000	2017	704.0	2nd
State & Local Police Officers per 100,000	2018	21.0	22nd

Source: State Rankings 2020, pgs. 29-30, 32-33, 35-36, 55, 58, 61

## COVID

With the onset of COVID-19 in the United States in early 2020, and its ongoing effect, there have been many federal laws passed to address the impact the pandemic has had. The federal government has spent over \$5 trillion responding to the public health emergency.

### Federal Legislation in Response to COVID

Law	Enactment Date	Estimated Budgetary Effect
Coronavirus Preparedness and Response Supplemental Appropriations Act	March 6, 2020	\$8.257 Billion
Families First Coronavirus Response Act	March 18, 2020	\$191.99 Billion
Coronavirus Aid, Relief, and Economic Security (CARES) Act	March 27, 2020	\$1.721 Trillion
Paycheck Protection Program and Health Care Enhancement Act	April 24, 2020	\$483.4 Billion
Consolidated Appropriations Act, Division M and N: Coronavirus Response and Relief Supplemental Appropriations Act, 2021	December 27, 2020	\$868 Billion
American Rescue Plan Act (ARPA)	March 11, 2021	\$1.856 Trillion

Source: <https://www.cbo.gov/publication/56403> ;  
<https://www.cbo.gov/publication/57343>

According to the Pandemic Response Accountability Committee (PRAC), the amount of funding Oklahoma has received from all pieces of legislation totals \$28.97 billion. (<https://www.pandemicoversight.gov/data-interactive-tools/interactive-map>)

A large portion of that amount was for the three rounds of economic impact payments sent to taxpayers which totals close to \$10.11 billion: CARES Act- \$3.38 billion; Consolidated Appropriations Act- \$1.8 billion; ARPA - \$4.93 billion. (<https://ffis.org/COVID-19>)

## COVID

### Economic Impact Payments to Taxpayers

Law	Amount of Payment	Maximum Income to Receive Payment
CARES Act	\$1,200 per adult \$500 per child	Single: \$99,000 HOH: \$136,500 Married: \$198,000
Consolidated Appropriations Act	\$600 per adult \$600 per child	Single: \$87,000 HOH: \$124,500 Married: \$174,000
American Rescue Plan (ARPA)	\$1,400 per adult \$1,400 per child	Single: \$80,000 HOH: \$120,000 Married: \$160,000

HOH- Head of Household

The amount of each payment for married couples filing jointly was twice the size of the payment listed for singles above. For each round of payments, the amount started phasing out at an income level of \$75,000 for singles, \$112,500 for heads of households, and \$150,000 for married couples.

Source: <https://www.pgpf.org/blog/2021/03/what-to-know-about-all-three-rounds-of-coronavirus-stimulus-checks>

One type of program greatly expanded during the pandemic was unemployment assistance. Some people who would not have normally been eligible to receive regular unemployment benefits became eligible for Pandemic Unemployment Assistance (PUA). In addition, U.S. Department of Labor rules allowed people to receive benefits prior to their filing claims. Expansion of unemployment programs and the easing of some eligibility requirements led to increased fraud – especially identity theft. Of the identity theft reports received by the Federal Trade Commission in 2020, over 394,000 came from people who said their information was misused to apply for a government benefit. This represents a staggering increase of nearly 3000% from 2019. According to the OK Employment Security Commission, since the pandemic began, states have seen nearly \$26 billion in unemployment fraud and spent several million more investigating cybercriminals. In response to the unprecedented scope of UI fraud, the Department of Justice

## COVID

established the National Unemployment Insurance Fraud Task Force (NUIFTF). The NUIFTF is a prosecutor-led multi-agency task force with representatives from FBI, DOL-OIG, IRS-CI, HSI, DHS-OIG, SSA-OIG, FDIC-OIG, and other agencies.

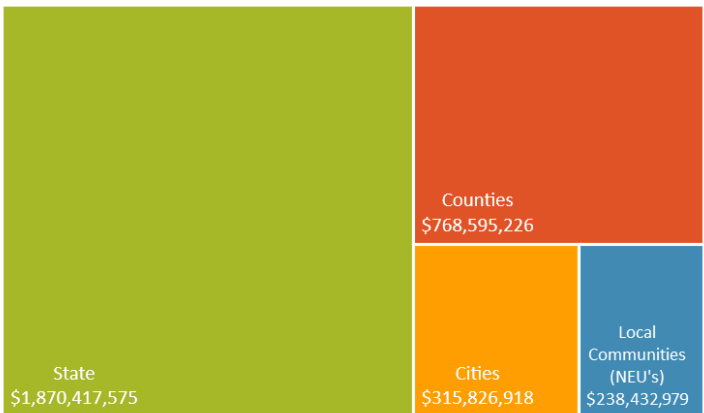
### American Rescue Plan Act (ARPA)

As previously noted, the most recent legislation and the largest in dollar amount is the American Rescue Plan Act, more commonly called ARPA. Besides continuing or expanding many programs created in previous COVID related acts, ARPA also included the State and Local Fiscal Recovery Fund (SLFRF). These funds may be used to:

- Respond to the public health and economic emergency;
- Provide premium pay to essential workers;
- Replace revenue lost due to the pandemic; and
- Make necessary investments in water, sewer, and broadband infrastructure.

In total, State and Local governments in Oklahoma will receive \$3.19 billion in federal dollars.

### Oklahoma SLFRF Breakdown



Local Communities are often referred to as NEU's or non-entitlement units. These are the 579 cities, towns, and/or communities with fewer than 50,000 in population. Their funds will be distributed through the Grant Management Office of OMES after registering and applying through the portal set up by

## COVID

the Oklahoma Municipal League. Funding will be in two tranches with the first already distributed to the state. As of the end of November 2021, \$100 million of the first tranche had been distributed by the state to 246 NEU's.

The amount allocated to cities are for the ten largest cities and those funds are distributed directly to the cities from the U.S. Treasury Department.

Broken Arrow City	\$	13,768,466
Edmond	\$	12,741,315
Enid	\$	11,854,984
Lawton	\$	18,202,822
Midwest City	\$	9,858,239
Moore City	\$	8,469,969
Norman	\$	22,245,542
Oklahoma City	\$	122,507,590
Shawnee	\$	8,351,474
Tulsa	\$	87,826,517

### Joint Committee on Pandemic Relief Funding

To ensure the state funds are allocated in a transparent and responsible manner in accordance with federal guidelines, the Legislature has worked in collaboration with the Executive Branch leaders to form the Joint Committee on Pandemic Relief Funding. The committee is comprised of 24 voting members- 12 each from the House and the Senate and 2 non-voting members: Representative Phillips and Senator Leewright. The shared vision of the Joint Committee is to make strategic investments that will be transformative and benefit future generations while improving services today. The committee's primary goals are:

- Build a stronger, more innovative, and more diverse Oklahoma economy.
- Enhance capabilities of state services for the wellbeing of all citizens, especially the most vulnerable.
- Invest in physical and digital infrastructure to expand economic growth.

The Joint Committee is divided into four working groups to focus on different areas affected by the pandemic.

## COVID

### Economic Development and Workforce



- **Responsibilities:**  
Business and Commerce; Education
- **Cabinet Agencies:**  
Commerce & Workforce Development (Mueller); Economic Administration (Grigsby); Education (Walters); Science & Innovation (Pollard); Veterans Affairs & Military (Robinson)
- **Senate Members:**  
Pugh (Co-Chair), Stanley, PPT Treat
- **House Members:**  
Baker (Co-Chair), Blancett, McDugle

### Health and Human Services



- **Responsibilities:**  
Children, Youth & Family; Health & Human Services; Housing
- **Cabinet Agencies:**  
Health & Mental Health (Corbett); Human Services (Brown)
- **Senate Members:**  
Haste (Co-Chair), Kirt, Montgomery
- **House Members:**  
Hilbert (Co-Chair), Echols, Munson



## COVID

### Government Transformation and Collaboration



- **Responsibilities:**  
General Government & Modernization; Tourism; Collaboration w/ other entities: County, Municipal, Tribal, COGS
- **Cabinet Agencies:**  
Digital Transformation & Administration (Harpe); Licensing & Regulation (Winchester); Native American Affairs (Bingman); Tourism, Wildlife & Heritage (Pinnell)
- **Senate Members:**  
Hall (Co-Chair), Floyd, Howard
- **House Members:**  
Boatman (Co-Chair), Boles, Steagall

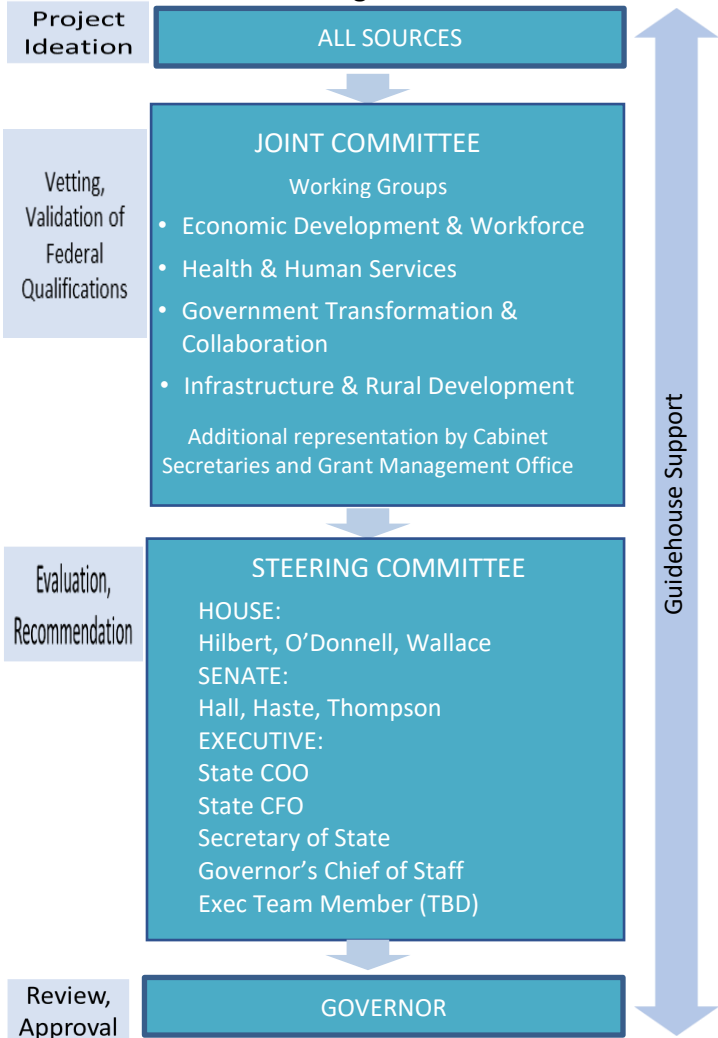
### Transportation, Infrastructure and Rural Development



- **Responsibilities:**  
Broadband; Agriculture & Natural Resources; Utilities; Wildlife; Public Safety; Transportation
- **Cabinet Agencies:**  
Agriculture (Arthur); Energy & Environment (Wagner); Public Safety (Everest); Transportation (Gatz)
- **Senate Members:**  
Leewright (Co-Chair), David, Floyd, Murdock
- **House Members:**  
Phillips (Co-Chair), Fetgatter, Munson, Osburn

# COVID

## Funding Process



ARPA funds must be allocated for specific projects by December 2024, with funds expended by December 2026. Reporting to the U.S. Treasury will occur quarterly, with performance reporting occurring annually.

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