

FY 2027 Budget Performance Review
09200 Tobacco Settlement Endowment Trust TSET

Version Original
 Lead Administrator: Julie Bisbee

Date submitted
 Lead Financial Officer: Megan Meers

10/1/2025

Agency Mission

Improve the health and well-being of Oklahomans through programs that reduce tobacco use and obesity – the leading causes of preventable chronic disease – and by funding research that improves treatment and saves lives.

Division and Program Descriptions

Note: Please define any acronyms used in program descriptions.

Statewide Grants

Improve the health of all Oklahomans: reducing leading causes of preventable death (cancer and cardiovascular disease) by preventing and reducing tobacco use and obesity.

Community-based Grants

Improve the health of all Oklahomans: reducing leading causes of preventable death (cancer and cardiovascular disease) by preventing and reducing tobacco use and obesity.

Research

Funding for cutting-edge research in cancer, cardiovascular and other related diseases.

Rural Physicians

Partnering to bring additional doctors and physician training programs to rural Oklahoma.

Oklahoma Tobacco Helpline

Free 24/7 services providing the tools and support needed to quit tobacco.

Tobacco Stops With Me

Tobacco Stops With Me (TSWM) is a public health intervention that provides an efficient, emotional and highly recognizable tobacco-free message for Oklahomans. TSWM encourages Oklahomans to make their lives tobacco/vape free. In addition, TSWM supports a tobacco cessation message by educating Oklahomans about the health dangers of tobacco use and secondhand smoke.

Shape Your Future

Shape Your Future (SYF) encourages Oklahomans to adopt and maintain a healthy lifestyle. The award-winning campaign and supporting website, ShapeYourFutureOK.com, works to educate Oklahomans on ways to eat better, move more, drink water and be tobacco free. Through facts, motivational messaging and free online tools, Shape Your Future helps individuals, families and communities address and reverse the historically poor health outcomes in Oklahoma.

TSET Healthy Youth Initiative--Health Communication

Oklahoma youth face health challenges like never before, from the increase in teen vaping to rising rates of obesity. To help tackle these trends, the Tobacco Settlement Endowment Trust (TSET) launched the TSET Healthy Youth Initiative to educate Oklahoma teens and help them make informed choices about their health.

TSET Healthy Youth Initiative--Youth Action for Health Leadership

Youth Action for Health Leadership (YAHL) is a program that allows youth to create a measurable impact by making lasting changes in nutrition, active-living, and tobacco policies. Teens can develop leadership skills and have the opportunity to earn community service hours while being directly involved in making their community and Oklahoma a healthier place.

TSET Legacy Grants

The TSET Board of Directors has created a historic funding opportunity, TSET Legacy Grants, for time limited, launch-ready, large-scale initiatives that align with the Agency's mission of improving health and reducing the risk factors for the leading causes of preventable death due to cancer and cardiovascular disease.

TSET Legacy Grants provide a unique opportunity to create significant and meaningful health impacts across Oklahoma. TSET Legacy Grant funding is not meant to sustain an existing program or replace current funding. Once TSET funding has ended, the expectation is that a significant portion or all of the project TSET funded is likely to continue.

TSET Legacy Grants will have a minimum requirement on applications of at least \$3 million per project. Projects must span at least one year, with the TSET-funded project phase to be completed within three years. Significant outcomes are required for each year of requested funding. All grant activities and expenditures should occur between calendar years 2026-2028. High performing grants may have the option to submit a proposal for two additional years as funding is available.

Dept. #	Department Name	Appropriations	Federal	Revolving	Local ¹	Other ²	Total
1000001	Administration	\$0	\$0	\$2,252,421			\$2,252,421
2000001	Administration - Board of Investors	\$0	\$0	\$203,000			\$203,000
2000002	Investments	\$0	\$0	\$5,605,619			\$5,605,619
3000099	Program Support	\$0	\$0	\$3,884,910			\$3,884,910

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3010300 TC Health Communication	\$0	\$0	\$18,333,422
3010501 Tobacco Control Helpline	\$0	\$0	\$7,180,731
3020300 N&F Health Communication	\$0	\$0	\$5,690,000
3030100 Wellness Technical Assistance/Evaluation	\$0	\$0	\$4,380,989
3030200 Wellness Health Communication	\$0	\$0	\$643,948
3030300 Wellness Community Grants	\$0	\$0	\$5,358,576
3030301 Health Comm Program Outreach	\$0	\$0	\$0
3030410 Community Grants	\$0	\$0	\$22,337,247
3030500 Wellness Statewide Grants Contracts	\$0	\$0	\$23,515,917
3030700 Wellness Consultation	\$0	\$0	\$355,000
3050901 Tobacco Related Research	\$0	\$0	\$11,650,000
3050903 Adult Stem Cell Research	\$0	\$0	\$3,000,000
3060000 Conference Sponsorships	\$0	\$0	\$50,000
8800010 ISD DP - Board of Directors	\$0	\$0	\$764,176
8889010 Salesforce Implementation	\$0	\$0	\$0
Total	\$0	\$0	\$115,205,956
1. Please describe source of Local funding not included in other categories:			
2. Please describe source(s) and % of total of "Other" funding if applicable for each department:			

Balances of Appropriated Funds from Prior Fiscal Years						
3-digit Class Fund #	Class Fund Name	GA Bill # and Section #	Fiscal Year of Original Appropriation	Original Appropriation Amount (\$)	Total Expended Amount as of 8/31/2025 (\$)	Balance as of 8/31/2025 (\$)
	NA					\$0
<i>Total remaining prior year appropriation balance:</i>						\$0

Report appropriations that have existing balances from all prior fiscal years at the 3-digit class fund number (i.e. 194, 195). Do not report carryover class funds separately. Include appropriations located in disbursing funds. Report PREP, but not ARPA/SRF, appropriations.

What changes did the agency make between FY'25 and FY'26?

1.) Are there any services no longer provided because of budget cuts?	No
2.) What services are provided at a higher cost to the user?	N/A - TSET does not charge for services.
3.) What services are still provided but with a slower response rate?	N/A
4.) Did the agency provide any pay raises that were not legislatively/statutorily required?	Yes. In FY25, 5 staff that took on new roles or increased responsibilities received adjustments in pay in line with job duties of similar jobs within the State of Oklahoma.
All adjustments in salary or other compensation are budgeted and approved by the TSET Board of Directors in accordance with TSET policies and state law.	

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Appropriation Increase Review

	Appropriation Increases (Additional to Agency Base Appropriation)			Expenditures	
	FY 2024	FY 2025	Total Amount Received FY 2024-2025	Total Expenditure of Increase as of 6/30/2025	If funds have not been spent, please explain why.
			\$0 \$0 \$0 \$0 \$0 \$0 \$0		
<i>Total:</i>	\$0	\$0	\$0	\$0	

List appropriation increases that the agency has received in the prior two years. List amounts received in each year. Include PREP, but not ARPA/SRF, appropriations.

FY'27 Requested Funding By Department and Source

1. Please describe source(s) and % of total of "Other" funding for each department:

FY'27 Top Five Incremental Appropriated Funding Increase Requests

Request by Priority	Request Description	Is this a Supplemental Request? (Yes/No)	Timeframe (One-Time or Recurring)	Appropriation Request Increase Amount (\$)
	Request 1: TSET is requesting no appropriations.			
Request 2:				
Request 3:				
Request 4:				
Request 5:				

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Top Five Request Subtotal: \$0

Total Increase above FY-26 Budget (including all requests)

\$0

Difference between Top Five requests and total requests:

\$0

* Capital requests in the table above should be listed in the next table.

What are the agency's top 2-3 capital or technology (one-time) requests, if applicable?

Description of requested increase in order of priority	Total Project Cost (\$)	Needed State Funding for Project (\$)	Submitted to LRCPC? (Yes/No)
Priority 1			
Priority 2			
Priority 3			

Does the agency has any costs associated with the Pathfinder retirement system and federal employees? If so, please describe the impact.

No

* Include the total number of federally funded FTE in the Pathfinder system.

How would the agency be affected by receiving the same appropriation for FY '27 as was received in FY '26? (Flat / 0% change)

TSET is requesting no appropriations.

How would the agency handle a 2% appropriation reduction in FY '27?

TSET is requesting no appropriations.

Is the agency seeking any fee increases for FY '27?

Description of requested increase in order of priority	Fee Increase Request (\$)	Statutory change required? (Yes/No)
Increase 1 TSET does not collect or apply fees for services.		
Increase 2		
Increase 3		

Federal Funds

CFDA	Federal Program Name	Agency Dept. #	FY 26 budget (\$)	FY 25 actuals (\$)	FY 24 actuals (\$)	FY 23 actuals (\$)	FY 25 budgeted FTE (#)
	N/A						

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Federal Government Impact

1.) How much federal money received by the agency is tied to a mandate by the Federal Government?

TSET does not receive federal funds.

2.) Are any of those funds inadequate to pay for the federal mandate?

TSET does not receive federal funds.

3.) What would the consequences be of ending all of the federal funded programs for your agency?

TSET does not receive federal funds.

4.) How will your agency be affected by federal budget cuts in the coming fiscal year?

TSET does not receive federal funds.

5.) Has the agency requested any additional federal earmarks or increases?

No.

FY 2026 Budgeted FTE

Division #	Division Name	Supervisors	Non-Supervisors	\$0 - \$35 K	\$35 K - \$70 K	\$70 K - \$100K	\$100K+
10 Administration		5	8		5	5	3
30 Programs		10	22		17	13	2
Total		15	30	0	22	18	5

FTE History by Fiscal Year

Division #	Division Name	FY 2026 Budgeted	FY 2026 YTD	FY 2025	FY 2024	FY 2023	FY 2017
10 Administration		13	12	13	13	13	11
30 Programs		32	30	29	26	17	12

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Total	45	42	42	39	30	23

Performance Measure Review						
	FY 2025	FY 2024	FY 2023	FY 2022	FY 2021	
Statewide Grants						
Number of Oklahoma Tobacco Helpline Referrals	13,002	12,097	13,675	12,967	12,989	
Community-based Grants						
Number of retailer education visits completed	1,168	644	866	134	0	
Research						
Cumulative number of researchers	87	86	79	77	69	
Rural Physicians						
Number of Physicians	33	37	31	37	42	
Oklahoma Tobacco Helpline						
Registrants for services	27,518	27,274	21,963	21,323	19,656	
Tobacco Stops With Me						
Maintain the percentage of Oklahomans who are very or somewhat likely to work to make their community tobacco free at 48%	57%	52%	48%	54%	n/a	
Shape Your Future						
Maintain the percentage of Oklahomans who strongly agree they make sure their children get 60+ minutes of physical activity each day at 31%	37%	34%	31%	38%	38%	
TSET Healthy Youth Initiative--Communication						
Percentage of Oklahoma Youth Aware of the Swap Up Campaign	76%	74%	69%	69%	n/a	
TSET Healthy Youth Initiative--Programs						
Cumulative number of school districts that adopt an Elevate Student Health comprehensive school wellness policy, encouraging physical activity, nutrition and tobacco-free lifestyles	8	6	4	1	n/a	

Revolving Funds (200 Series Funds)			
	FY'23-25 Avg. Revenues	FY'23-25 Avg. Expenditures	June 2025 Balance
20000: TSET Revolving Fund	\$101,000,288	\$55,066,768	\$7,107,540
<i>This is the revolving fund for the agency. All revenue and expenditures run through this fund with the exception of interagency reimbursements. This revenue source is certified earnings from the TSET Endowment Fund. Funds remain invested in the Endowment until spent.</i>			
44300: TSET Interagency Reimbursements	\$4,000,000	\$4,000,000	\$3,266,225
<i>This fund is used for reimbursements from other state agencies for cost sharing of expenditures related to the Oklahoma Tobacco Helpline.</i>			

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FY 2026 Current Employee Telework Summary

List each agency physical location (not division), then report the number of employees associated with that location in the teleworking categories indicated. Use "No specified location" to account for remote employees not associated with a site. Use actual current employees (headcount), not budgeted or actual FTE.

Full-time and Part-time Employees (t)