

1716 W. Adams
Phoenix, AZ 85007

Phone:
(602) 926-5491



www.azleg.gov/jlbc.htm

"FY 2021

General Fund

revenues are

19.0% above

the prior year

and are \$252.9

million above

the October

FAC forecast"

Summary

The state's General Fund revenue growth remained very healthy in November. During the month, General Fund revenues were \$951.7 million, which represents an increase of 16.5% above the prior year. Compared to the October FAC revenue forecast, revenues during November were \$149.2 million above forecast.

The state's forecast gain occurred mostly in the Individual Income Tax (IIT) category, where the category increased by 22.9% and was \$96.0 million above forecast. The IIT gains were in part due to the timing of withholding collections – the largest withholding deposits tend to occur on Monday's, and there was an additional Monday this November compared to November 2019. Beyond the occurrence of an extra Monday, the withholding deposit the state received on the first Monday of November was abnormally large and may also reflect an underlying technical issue unrelated to the state's overall economic condition.

Most of the remaining forecast gain came from the Sales Tax category, which grew by 9.1% and was \$39.5 million above forecast. While this growth rate is slightly lower than the double-digit rates seen over the last few months, it still represents very strong growth in consumer spending activity. In particular, the state continues to see robust growth in revenue from retail sales (including remote sales) and contracting tax collections. (See *the Sales Tax section below for more information on the revenue category*)

Year-to-Date Revenue/Operating Balance

Year-to-date through November, excluding Urban Revenue Sharing and fund transfers, FY 2021 General Fund revenues are 19.0% above the prior year and are \$252.9 million above the October FAC forecast. The high year-to-date revenue percentage growth rate is mostly due to the state's deferral of the income tax filing due date from April 15 to July 15. Without the deferral, state revenue collections would be up 7.7% this fiscal year.

The state's fiscal health can also be measured by the operating fund balance. The state pays its bills out of the operating fund balance, which consists of the General Fund and certain dedicated funds. The operating balance as of mid-November 2020 is \$4.37 billion.

Updates for January Baseline Projections

In our [October Budget Update](#), we projected a FY 2022 General Fund ending balance of \$93 million. At that time, we noted that there was potential for K-12 and AHCCCS savings, but we lacked sufficient information to estimate those gains. In addition, revenue growth has been much stronger than expected. Given those revenue gains, we estimated in the November *Monthly Fiscal Highlights* that the FY 2022 ending balance could be \$400 million to \$800 million.

We are now able to refine both our revenue and spending estimates even further. Relative to the October FAC FY 2022 projections, we currently foresee the following potential adjustments:

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- **Increased Revenue Projections (\$800 million):** While we estimated the gain last month at \$400 million to \$800 million, we are now much more likely to be at the upper end of that range, if not even higher. As noted above, after only 2 months of tracking revenues against the revised October forecast, the state has already generated a forecast gain \$253 million. Our FY 2022 revenue estimate will be officially revised in January as we compile the results from our 4-sector forecast.
- **FY 2020 Medicaid Match Savings (\$90 million):** COVID relief legislation enacted by Congress increased the federal government share of Medicaid costs by 6.2%, effective January 2020 through the end of the declared Federal Health Emergency. While most of these savings during FY 2020 have already accrued to the state, due to accounting delays a portion of these savings were not included in the October Budget Update. These delayed savings of \$90 million will increase available resources.
- **FY 2021 Medicaid Match Savings (\$250 million to \$300 million):** Given concerns that above-budget Medicaid provider rate adjustments would absorb these savings, the October Budget Update did not include any FY 2021 savings associated with the enhanced Medicaid match. The provider adjustments have subsequently been published and they will be primarily funded from non-

General Fund sources. The higher federal match rate is currently in place through March 2021. Based on our latest projections, we anticipate saving \$(250) million to \$(300) million relative to the October estimates.

- **K-12 Enrollment Savings (\$300 million):** For the October Budget Update, our office lacked sufficient data to project savings associated with declining school enrollment or a shift to online learning (which is funded at 95% of standard formula costs). Given enrollment data through November, we now estimate that ADE General Fund spending in FY 2021 may be \$(300) million lower than our October projection. If these monies are not expended, they are returned to the General Fund for use in FY 2022. In addition, we are also likely to generate added savings from greater online learning, but those estimates are much more speculative at this time.

After accounting for the above issues, the FY 2022 balance could be \$1.2 billion to \$1.4 billion. The FY 2022 balance would be mostly one-time in nature, due to it being driven by one-time factors such as the enhanced federal match rate and K-12 enrollment declines related to the COVID-19 pandemic.

We will publish updated ending balance projections as part of our January Baseline.

November Revenues

Table 1

	General Fund Revenues (\$ in Millions)		
	<u>FY 2021 Collections</u>	<u>Difference From October FAC Forecast</u>	<u>Difference From FY 2020</u>
November	\$ 951.7	\$ 149.2	\$ 135.1
Year-to-Date	\$ 5,527.4	\$ 252.9	\$ 895.8

Sales Tax collections of \$493.4 million were 9.1% above November of last year and \$39.5 million above the October forecast.

As shown in *Table 2*, all of the state's sales tax categories, except for restaurant and bar, performed well in November when compared to the same month in the prior year.

Since March, Restaurant and Bar Sales Tax collections have been performing poorly, posting double-digit declines below the comparable month in the prior year.

However, there has now been some relative improvement recently, with October and November Restaurant and Bar revenue declining by only single digits year-over-year.

Table 2

	Sales Tax Growth Rates Compared to Prior Year	
	<u>Nov</u>	<u>YTD</u>
Retail/Remote Seller	13.1%	19.4%
Contracting	24.7%	21.1%
Use	16.3%	12.2%
Restaurant & Bar	(8.9)%	(10.8)%
Utilities	13.3%	7.6%

November Revenues (Continued)

Individual Income Tax (IIT) Net collections were \$467.9 million in November, which was 22.9% higher than November 2019 and \$96.0 million above the October FAC forecast.

Withholding revenue was \$456.6 million in November, 20.4% greater than last November and \$74.7 million above forecast. There was an additional Monday this November compared to November 2019, which helps to explain the stronger-than-expected year-over-year growth in withholding. The first Monday in November also had an unusually large deposit, which further boosted the year-over-year growth rate.

Payments also had a strong month, ending November at \$34.8 million. This is 11.8% above the previous November and \$9.9 million higher than forecast.

Refunds were (21.0)% lower than last year. This is due in part to having one fewer refund processing day (Friday) than last November.

	<u>November</u>	<u>YTD</u>
Withholding	20.4%	4.4%
Estimated/Final Payments	11.8%	180.5%
Refunds	(21.0)%	81.7%

Corporate Income Tax (CIT) net revenue was \$7.1 million in November, which was \$18.2 million above the October forecast. It is not unusual for net collections in November to be negative (as refunds often exceed payments in this month). Historically, November collections represent a small share of the fiscal-year total.

Year-to-date, net collections through November are \$250.6 million, an increase of 16.1% over the same period in the prior year.

Insurance Premium Tax (IPT) revenue was \$2.1 million in November, which was \$(4.6) million below the amount collected in November 2019 and \$(2.9) million below the October forecast. While small, the amount of IPT collected in November is within the typical range for this month.

Year-to-date, net collections through November are \$169.1 million, an increase of 3.0% over the same period in the prior year.

The **Lottery Commission** reported that total ticket sales in November were \$98.7 million. This amount is 20.6% above ticket sales in November 2019. Year-to-date, ticket sales are \$150.6 million or 42.9% above the same

period in the prior year. The November General Fund deposit, which is from the FY 2020 year-end profit transfer, was \$29.6 million, an amount which was \$1.2 million above forecast. Year-to-date General Fund Lottery revenue is \$3.9 million above forecast.

Highway User Revenue Fund (HURF) collections of \$123.9 million in November were (4.6)% below the amount collected in November 2019 but \$18.4 million above forecast. Year-to-date, HURF collections have increased by 4.9% compared to the same period in the prior year and are \$137.3 million above forecast.

Due to delays in reporting final October revenues for various revenues sources, DOR has made **technical adjustments** to prior month collection figures. For November, DOR has reduced the amount of prior General Fund revenue collections by \$(1.2) million, and this amount has been included in the reported year-to-date results.

Table 4

General Fund Revenue: Change from Previous Year and October FAC Forecast November 2020

	Current Month					FY 2021 YTD (Five Months)				
	Actual November 2020	Change From November 2019		October FAC Forecast		Actual November 2020	Change from November 2019		October FAC Forecast	
		Amount	Percent	Amount	Percent		Amount	Percent	Amount	Percent
<u>Taxes</u>										
Sales and Use	\$493,411,681	\$41,137,164	9.1 %	\$39,488,508	8.7 %	\$2,460,235,423	\$256,183,456	11.6 %	\$106,969,899	4.5 %
Income - Individual	467,871,483	87,204,177	22.9	96,043,528	25.8	2,831,021,833	646,799,957	29.6	110,225,667	4.1
- Corporate	7,057,150	13,057,269	--	18,159,453	--	250,614,408	34,829,908	16.1	28,719,801	12.9
Property	3,054,917	2,200,788	257.7	(3,681,728)	(54.7)	7,784,014	(2,523,291)	(24.5)	(1,596,384)	(17.0)
Luxury - Tobacco	1,745,242	(42,009)	(2.4)	0	--	9,133,354	211,303	2.4	(299,445)	(3.2)
- Liquor	3,481,455	374,694	12.1	0	--	15,805,828	1,410,400	9.8	(861,230)	(5.2)
Insurance Premium	2,128,401	(4,626,219)	(68.5)	(2,859,163)	(57.3)	169,140,889	4,895,519	3.0	3,948,471	2.4
Other Taxes	487,139	(224,460)	(31.5)	(558,981)	(53.4)	4,538,742	810,509	21.7	(486,211)	(9.7)
Sub-Total Taxes	\$979,237,470	\$139,081,402	16.6 %	\$146,591,618	17.6 %	\$5,748,274,490	\$942,617,759	19.6 %	\$246,620,568	4.5 %
<u>Other Revenue</u>										
Lottery	29,610,199	11,143,580	60.3	1,163,552	4.1	62,204,274	4,247,860	7.3	3,913,552	6.7
License, Fees and Permits	4,279,514	926,234	27.6	734,234	20.7	17,680,373	1,900,104	12.0	971,780	5.8
Interest	4,338	16,552	--	4,338	N/A	10,472	21,939	(191.3)	7,097	210.3
Sales and Services	1,762,594	134,225	8.2	(344,926)	(16.4)	10,332,632	1,398,270	15.7	1,102,028	11.9
Other Miscellaneous	2,870,239	(7,034,480)	(71.0)	(184,645)	(6.0)	11,075,573	(6,507,697)	(37.0)	(89,136)	(0.8)
Disproportionate Share	0	0	--	0	--	0	0	--	0	--
Transfers and Reimbursements	897,104	(1,585,336)	(63.9)	1,245,192	--	14,530,504	(9,117,192)	(38.6)	362,198	2.6
Sub-Total Other Revenue	\$39,423,989	\$3,600,775	10.1 %	\$2,617,744	7.1 %	\$115,833,828	(\$8,056,716)	(6.5) %	\$6,267,520	5.7 %
TOTAL BASE REVENUE	\$1,018,661,458	\$142,682,178	16.3 %	\$149,209,362	17.2 %	\$5,864,108,318	\$934,561,043	19.0 %	\$252,888,088	4.5 %
<u>Other Adjustments</u>										
Urban Revenue Sharing	(69,041,072)	(7,577,640)	12.3	0	(0.0)	(345,205,358)	(37,888,198)	12.3	0	(0.0)
One-Time Transfers	0	0	--	0	--	0	(846,800)	--	0	--
Public Safety Transfers	2,122,109	0	0.0	(0)	(0.0)	8,488,436	0	0.0	(0)	(0.0)
Sub-Total Other Adjustments	(66,918,962)	(7,577,640)	12.8 %	0	(0.0) %	(336,716,921)	(38,734,998)	13.0 %	0	(0.0) %
TOTAL GENERAL FUND REVENUE	\$951,742,496	\$135,104,538	16.5 %	\$149,209,362	18.6 %	\$5,527,391,397	\$895,826,044	19.3 %	\$252,888,088	4.8 %
<u>Non-General Funds</u>										
Highway User Revenue Fund	123,904,531	(6,023,614)	(4.6) %	18,433,570	17.5 %	661,710,883	30,784,699	4.9 %	137,283,084	26.2 %

Monthly Indicators

NATIONAL

The U.S. Bureau of Economic Analysis' second estimate for the **U.S. Real Gross Domestic Product (GDP)** in the third quarter of calendar year 2020 remained unchanged from their preliminary estimate of 33.1% released in the prior month.

The Conference Board's **Consumer Confidence Index** decreased (5.3) points in November. This puts consumer confidence close to the average over the last five months and (36.5) points below the pre-pandemic peak. The drop was driven primarily by lowered expectations of future employment conditions. These results could be skewed downward as the cutoff for survey responders was November 13, shortly after promising COVID-19 vaccine results were announced. The impact of this announcement on consumer confidence may not be fully reflected in the November results.

The Conference Board's **U.S. Leading Economic Index (LEI)** increased by 0.7% to 108.2 in October. Over the last six months, LEI has grown by 11.7%, a strong turnaround compared to the (13.0)% decline in the previous six months. While housing permits and consumer confidence fell in October, manufacturing, employment, and the stock market all improved.

The U.S. Bureau of Labor Statistics **Consumer Price Index (CPI)** rose by 0.2% in November. After seasonal adjustment, prices are 1.2% higher than in November 2019. These gains were broad-based. The energy index was up by 0.4%, which included large increases in natural gas and electricity prices that offset a fall in the gasoline index. Overall food prices declined by (0.1)%, as the (0.3)% decrease in the food at home index more than offset the 0.1% increase in the food away from home component. Core inflation (all items less food and energy) was also up by 0.2% this month, and core CPI is 1.6% higher than in November 2019.

ARIZONA

Single-family housing permitting activity is continuing to grow. In October, Arizona's 12-month total of **single-family building permits** was 38,949. This is up 2.5% from the prior month, and is 19.4% above October 2019. This is the 5th consecutive month with double-digit year-over-year growth. This is above the national growth of single-family housing permits of 10.2%.

In October, Arizona's 12-month total of 15,356 **multi-family building permits** was 41.5% more than for the same 12-month period in 2019. October marked the 12th consecutive month with a double-digit year-over-year

growth rate in multi-family permitting activity. This is in contrast to the national decline in multi-family housing permits of (9.2)%.

Tourism and Restaurants

As expected, most tourism indicators continue to show improvement from the prior month while still falling below the previous year's levels. For example, **Revenue per available room** was \$58.29 in October, an increase of 18.4% from September but still (33.9)% below the same month from the prior year.

In addition, **Phoenix Sky Harbor Airport Ridership** during October increased 20.4% above the previous month but was (51.4)% below October 2019.

Daily restaurant reservations were (29.2)% below the prior year level on December 12, according to OpenTable data. This is a continuation of a trend that began November with decreasing restaurant reservations.

Employment

According to the latest employment report released by the Office of Economic Opportunity (OEO), the state gained 27,700 **nonfarm jobs** in November compared to the prior month. The private sector recorded a gain of 27,500 jobs over the month. Historically, (2010-2019), private sector employment has averaged a gain of 27,300 jobs in November.

Compared to the same month in the prior year, the state lost (83,900) jobs, a decrease of (2.9)%. Only three of the major 11 job sectors had a year-over-year job gain in November. The job gains were recorded in the Trade, Transportation & Utilities (+17,700), Construction (+2,300) and Financial Activities (+800). In contrast, the Leisure and Hospitality sector recorded the largest losses, with (43,800) jobs lost compared to the same month in the prior year. These losses are in most part due to the effects of the pandemic. The year-over-year job losses in Leisure and Hospitality have decreased in each of the last 4 months signaling that this sector of the economy has begun to slowly recover.

The state's seasonally adjusted **unemployment rate** decreased from 7.9% in October to 7.8% in November. The U.S. seasonally adjusted unemployment rate decreased from 6.9% in October to 6.7% in November (*See the October Monthly Fiscal Highlights for more information on the pandemic's effect on employment and labor force surveys*).

Monthly Indicators (Continued)

OEO reported that a total of 6,921 **initial claims for unemployment insurance** were filed in Arizona in the week ending on December 12th (This figure excludes the claims under the Pandemic Unemployment Assistance (PUA) program). For the same week in the prior year, 3,296 initial claims were filed.

According to OEO, for the week ending on December 5th, there were a total of 75,980 **continued claims for unemployment insurance** in Arizona. A year ago this time, the continued claims were 17,436.

For the week ending on December 12th, the federal Department of Labor (DOL) reported that 1,622 initial PUA claims were filed in Arizona. For the week ending on November 28th, DOL reported that 209,441 continued PUA claims were filed in the state. Both of these figures are advance estimates subject to change. (See *October's Monthly Fiscal Highlights for more information on Pandemic Unemployment Assistance*)

State Agency Data

As of December 1, 2020, the total **AHCCCS caseload** was 2.07 million members. Total monthly enrollment increased 0.9% in December over November and increased 12.8% compared to a year ago. Parent and child enrollment in the Traditional population increased by 0.4% in December, or 8.8% higher than a year ago.

Enrollment in Other Acute Care populations, including Prop 204 Childless Adults, Other Prop 204, Adult Expansion, and KidsCare, was 884,523 in December – an increase of 1.6% over November and 19.7% above last year. For December 2020, Long-Term Care EPD and DD population growth decreased by (0.1)%. At 65,876, this population is (1.1)% lower than a year ago.

There were 14,687 **TANF Cash Assistance recipients** in the state in October, representing a (7.7)% monthly caseload decrease from September. The year-over-year number of TANF Cash Assistance recipients has increased by 10.8%. The statutory lifetime limit on cash assistance is 24 months.

The **Supplemental Nutrition Assistance Program (SNAP)**, formerly known as Food Stamps, provides assistance to low-income households to purchase food. In October, 905,516 people received food stamp assistance in the state, representing a 0.01% increase from September caseloads. Compared to October 2019, the level of food stamp participation has increased by 10.5%.

The Arizona Department of Correction's **inmate population** was 38,141 as of November 30, 2020. This was a decrease of (0.9)% since October 31, 2020 and a (10.4)% decrease since November 2019.

Based on information the Department of Child Safety provided for October 2020, **reports of child maltreatment** totaled 43,306 over the last 12 months, a decrease of (6.0)% over the prior year. There were 14,373 **children in out-of-home care** as of September 2020, or 1.3% more than in September 2019. Compared to the prior month, the number of out-of-home children increased by 1.2%.

Table 5

MONTHLY INDICATORS				
Indicator	Time Period	Current Value	Change From Prior Period	Change From Prior Year
Arizona				
<u>Employment</u>				
- Seasonally Adjusted Unemployment Rate	November	7.8%	0.1%	3.3%
- Total Unemployment Rate (discouraged/underemployed)	2nd Q 2020	11.3%	2.1%	2.1%
- Initial Unemployment Insurance Claims	Week Ending Dec 12	6,921	(6.0)%	110.0%
- Continued Unemployment Insurance Claims	Week Ending Dec 5	75,980	(8.0)%	335.8%
- Non-Farm Employment - Total	November	2,935,500	1.0%	(2.9)%
Manufacturing	November	173,100	0.9%	(2.9)%
Construction	November	175,900	1.4%	1.3%
- Average Hourly Earnings, Private Sector	November	\$27.99	0.1%	4.0%
<u>Building</u>				
- Single-Family Building Permits (12 months rolling sum)	October	38,949	2.5%	19.4%
Multi-family	October	15,356	2.4%	41.5%
- Maricopa County/Other, Home Sales (ARMLS) Single-Family (Pending Sales)	October	6,623	(13.1)%	18.8%
- Maricopa County/Other, Median Home Price (ARMLS) Single-Family (Pending Sales)	October	\$344,900	1.4%	15.0%
- Maricopa Pending Foreclosures	October	1,248	(3.1)%	(45.1)%
<u>Tourism and Restaurants</u>				
- Phoenix Sky Harbor Air Passengers	October	1,900,868	20.4%	(51.4)%
- State Park Visitors	September	225,138	2.0%	11.2%
- Revenue Per Available Hotel Room	October	\$58.29	18.4%	(33.9)%
- Arizona Hotel Occupancy Rate	October	55.4%	3.9%	(15.4)%
- Arizona OpenTable Reservations – Y/Y % Change	December 12	N/A	N/A	(29.2)%
<u>General Measures</u>				
- Arizona Personal Income, SAAR	2nd Q 2020	\$372.2 billion	35.1%	11.1%
- Arizona Population	July 2019	7,278,717	N/A	1.7%
- State Debt Rating				
Standards & Poor's/Moody's Rating	May 2015/Nov 2019	AA / Aa1	N/A	N/A
Standards & Poor's/Moody's Outlook	May 2015/Nov 2019	Negative/Stable	N/A	N/A
<u>Agency Measures</u>				
- AHCCCS Recipients	December 1st	2,069,804	0.9%	12.8%
Traditional Acute Care		1,119,405	0.4%	8.8%
Other Acute Care		884,523	1.6%	19.7%
Long-Term Care – Elderly & DD		65,876	(0.1)%	(1.1)%
- Department of Child Safety (DCS)				
Annual Reports of Child Maltreatment (12-month total)	October	43,306	(0.3)%	(6.0)%
DCS Out-of-Home Children	September	14,373	1.2%	1.3%
- ADC Inmate Growth	November	38,141	(0.9)%	(10.4)%
- Department of Economic Security				
- TANF Cash Assistance Recipients	October	14,687	(7.7)%	10.8%
- SNAP (Food Stamps) Recipients	October	905,516	0.01%	10.5%
United States				
- Gross Domestic Product (Chained 2012 dollars, SAAR)	3rd Q, 2020 (2nd Estimate)	\$18.6 trillion	33.1%	(2.9)%
- Consumer Confidence Index (1985 = 100)	November	96.1	(5.2)%	(23.4)%
- Leading Economic Index (2016 = 100)	October	108.2	0.7%	(3.1)%
- Consumer Price Index, SA (1982-84 = 100)	November	260.8	0.2%	1.2%

JLBC Meeting Summary

At its December 2020 meeting, the Joint Legislative Budget Committee considered the following issues:

Executive Session

Arizona Department of Administration – Risk Management Services - Consideration of Proposed Settlements – The Committee approved settlements under Rule 14, which requires Committee approval of Risk Management settlements above \$250,000 pursuant to A.R.S. § 41-621(N).

Regular Session

Department of Veteran Services – Review of Veterans' Suicide Prevention Program – Section 94 of the FY 2021 General Appropriation Act requires the Department of Veterans' Services (DVS) to submit to the Committee for review its report on expenditures related to the Veterans' Suicide Prevention line item as well as the status of non-state matching funds. The Committee gave a favorable review of the report.

Consent Agenda

Arizona Department of Administration/Department of Economic Security – Review of Child Care ATLAS System Replacement – An FY 2021 General Appropriation Act footnote requires the Arizona Department of Administration (ADOA) to submit an expenditure plan for replacement of the Arizona Tracking and Locate Automated System (ATLAS) used by the Department of Economic Security (DES) - Division of Child Support Enforcement (DCSE). The Committee gave a favorable review of the plan to use \$14.3 million of Federal Funds and \$7.4 million of Other Appropriated Funds in FY 2021. The favorable review included a reporting provision and a provision regarding the availability of funds.

Department of Economic Security – Review of Developmental Disabilities Line Item Transfers – An FY 2020 General Appropriation Act footnote requires the Department of Economic Security (DES) to submit a report for Committee review prior to transferring any funds into or out of certain Division of Developmental Disabilities (DDD) line items. The Committee gave a favorable review of the transfers.

Arizona Department of Education – Review of Career and Technical Education (CTE) Credential List – A.R.S. § 15-249.15 requires the Arizona Department of Education (ADE) to submit for Committee review the career technical education industry credentials list for the Arizona Industry Credential Incentive Program. The Committee gave a favorable review of the request.

JLBC Staff – Consider Approval of Index for School Facilities Board Construction Costs – A.R.S. § 15-2041D3(c) requires that the cost-per-square-foot factors used in the School Facilities Board (SFB) new school construction formula shall be adjusted annually for construction market considerations based on an index identified or developed by the Committee. The Committee approved a 2.76% adjustment in the cost-per-square-foot factors.

JCCR Meeting Summary

At its December 2020 meeting, the Joint Committee on Capital Review considered the following issues:

Regular Agenda

Arizona Department of Corrections – Lewis/Yuma Capital Project: Review of FY 2021 Budget Funding and Quarterly Project Report – The Committee gave a favorable review of \$8.9 million for Lewis/Yuma prison upgrades as part of the Department's \$30.0 million FY 2021 Capital Outlay appropriation. The favorable review included provisions with reporting requirements.

Consent Agenda

Arizona State University – Review of Multipurpose Arena Construction Project – The Committee gave a favorable review of \$115.0 million in system revenue bond issuances for construction of a Multipurpose Arena. The favorable review included the standard university financing provisions and an additional reporting requirement.

University of Arizona – Consider Review and Approval of Grand Challenges Research Building and Applied Research Building Financing Projects – The Committee gave a favorable review of \$16.3 million in cash expenditures and approval of \$183.7 million in system revenue bond issuances for construction of new research facilities. The favorable review included the standard university financing provisions.

University of Arizona – Review of Deferred Maintenance Project – The Committee gave a favorable review of \$600,000 from the Capital Infrastructure Fund to pay for deferred maintenance projects at the University of Arizona Main Campus. The favorable review included the standard university financing provisions.

University of Arizona – Consider Approval of Chemistry Building Renovation Financing Project – The Committee approved \$42.0 million in system revenue bond issuances for renovation of the Chemistry Building on its main campus. The approval included the standard university financing provisions.

University of Arizona – Review of Facilities Management Building Project – The Committee gave a favorable review of \$15.5 million in system revenue bond issuances, which will be used along with \$8.5 million in land sale proceeds to fund construction of a new Facilities Management facility. The favorable review included the standard university financing provisions.

Arizona State Parks Board – Review of Alamo Lake State Park Wastewater Treatment Project – The Committee gave a favorable review of \$325,000 from the State Lake Improvement Fund to replace the main sewer pipe at the Alamo Lake State Park wastewater treatment facility. The favorable review included a provision with reporting requirements.

Arizona Game and Fish Department – Review of Building Renewal Reallocation Plan – The Committee gave a favorable review of a \$523,600 reallocation of FY 2020 and FY 2021 building renewal monies. The favorable review included a provision with reporting requirements.

Arizona State Lottery Commission – Review of FY 2021 Building Renewal Allocation Plan – The Committee gave a favorable review of the Commission's \$146,700 FY 2021 building renewal allocation plan for 5 projects at the Commission's main building in Phoenix. The favorable review included a provision with reporting requirements.

Summary of Recent Agency Reports

Arizona Department of Administration – Report on Emergency Telecommunications Services Revolving Fund

Pursuant to A.R.S. § 41-704, the Arizona Department of Administration (ADOA) submitted their annual report on the Emergency Telecommunications Services Revolving Fund (911 Program). The Arizona 911 Program is responsible for distributing revenues collected from the Emergency Telecommunications Services Revolving Fund. The fund receives revenue from a \$0.20 per month tax on wireline, wireless, and VoIP services and 0.8% of the gross income derived from pre-paid wireless services. ADOA received a total of \$20.7 million in funding requests from the local Public Safety Answering Points (PSAPs) for FY 2021. ADOA reports it will distribute a total of \$17.8 million in FY 2021 to PSAPs for the operation and support of 911 services. In addition, ADOA allocated \$1.6 million in FY 2021 for statewide GIS assessments, and data analytics and mapping tools.

In FY 2019, ADOA received a \$2.6 million federal grant to develop a Request for Proposal (RFP) for next-generation 911 (NG911) services and cyber security assessments. NG911 is an internet-based system which would allow interoperability within the state and implementation of text-to-911. ADOA will continue to use grant funding to assist PSAPs in transitioning to NG911 through March 2022. In addition, ADOA continues to work with the State Land Department to improve GIS data for 911 services. ADOA reports that 59 of the state's 79 PSAPs currently have text-to-911. The department will mandate that all PSAPs deploy text-to-911 by June 30, 2021 and is actively working with the remaining PSAPs to implement text-to-911. (Rebecca Perrera)

Arizona Department of Administration – Report on Arizona Financial Information System Transactions – Pursuant to A.R.S. § 41-740.01, the Arizona Department of Administration (ADOA) reported on the Arizona Financial Information System (AFIS) transaction counts by agency and fund source for FY 2020 and the proposed FY 2022 AFIS Transaction Fee. For FY 2020, the total number of transactions were 24.0 million compared to 24.9 million in FY 2019. The FY 2022 AFIS transaction fee is calculated by dividing FY 2022 AFIS operating costs of \$9.6 million by the FY 2020 total transactions. Therefore, the FY 2022 transaction fee will be 40 cents, an increase of 2 cents from FY 2021. Annual AFIS transactions continue to decline while the operating costs remains consistent which accounts for the increased fee. ADOA's FY 2022 budget request included a total increase of \$9.5 million over 3 years for an upgrade to AFIS which would require an increase to

the 40-cent AFIS transaction fee to finance the project. (Rebecca Perrera)

Arizona Department of Administration – Report on Repayment of State Debt and Obligations – Pursuant to A.R.S. § 41-726, the Arizona Department of Administration (ADOA) is required to report on the amount of potential savings if the state repays the balance of any outstanding long-term General Fund financing obligations, under the following repayment scenarios: \$50 million, \$100 million, \$150 million, and \$200 million. ADOA's report only listed debt obligations that are eligible for early retirement (also known as "callable") before the debt's final maturity date. Under this more limited standard, ADOA only provided a repayment scenario for the \$50 million threshold.

Allocating \$58.2 million for the repayment of state debt under this scenario would have a net lifetime savings in debt service payments of \$5.4 million.

For debt obligations that are not callable, the state may go through a process known as "cash defeasance". Under the defeasance process, the state deposits sufficient monies into an escrow account, so that the escrow account pays out all future required debt service payments. Once the defeasance process is completed, the associated debt is effectively removed from the state's list of outstanding obligations.

ADOA also provided a separate report listing various cash defeasance options. In terms of escrow deposit required and total net debt service savings, those options were as follows:

- School Facilities Board, Series 2015: \$171.4 million deposit, \$267,400 net savings
- ADOA, Series 2015: \$145.9 million deposit, \$3.4 million net savings
- ADOA, Series 2016: \$65.7 million deposit, \$161,700 net savings
- ADOA Lottery Revenue Bonds, Series 2019: \$269.7 million deposit, \$6.4 million net savings

(Rebecca Perrera)

AHCCCS – Report on Emergency Department Utilization – Pursuant to A.R.S. § 36-2903.11, AHCCCS reported on Arizona emergency department (ED) utilization. Currently there is no national standard for identifying whether an ED visit was the result of an emergency or non-emergency situation. Therefore, AHCCCS continues to analyze the state's Medicaid

Summary of Recent Agency Reports (Continued)

population using the American College of Emergency Physicians' coding, which assigns visits to 1 of 5 categories. Level I represents minor problems requiring minimal medical intervention, such as acute upper respiratory infection, removal of sutures, or cough. More severe conditions, such as severe burns or toxic ingestions, are classified as a Level V visit.

In FY 2019, total ED visits decreased from FY 2018 by 50,740, or (4.5%), and cost a total of \$578.2 million. Compared to the prior year, this amount represents an increase of \$8.5 million, or 1.5% in total payments for AHCCCS recipients receiving ED services. (Maggie Rocker)

Department of Child Safety – Quarterly Report on Foster Care and Medicaid – Laws 2013, Chapter 220, as amended by Laws 2016, Chapter 273 and Laws 2018, Chapter 152, requires the Department of Child Safety (DCS) to report on foster care and Medicaid eligibility. For the first quarter of FY 2021, DCS reported the following data regarding foster care and Medicaid eligibility:

1. There were 13,493 children eligible for Medicaid in foster care at the end of the quarter, which represents about 94% of children in out-of-home care.
2. The amount of non-Medicaid expenditures for behavioral health inpatient facilities and behavioral health residential facilities was \$468,961.
3. The amount of non-Medicaid behavioral health counseling/psychiatric services expenditures was \$53,915 (Nicole Lovato)

Arizona Community Colleges – Annual Report – Pursuant to A.R.S. § 15-1427, the Arizona Community Colleges are required to report by December 1 of each year on their progress during the previous year. They recently submitted their FY 2020 report, which includes the following summary information on the state system:

- 265,952 students (headcount) were enrolled for credit, resulting in a Full-Time Student Equivalent (FTSE) count of 108,368.
 - 90% of enrolled students resided within the district, while 10.0% did not reside within the district.
 - Total number of instructors employed was 8,171, of which 2,394 (29%) were full-time and 5,777 (71%) were part-time.
 - Total operating revenues were \$1.7 billion (this amount excludes bond proceeds and fund balance which total \$63.5 million).
 - Total expenditures were \$1.7 billion.
- (Lydia Chew)

Arizona Community Colleges – Report on Dual Enrollment Threshold – Pursuant to A.R.S. § 15-1821.01, the Arizona Community Colleges are required to report by December 1 of each year if dual enrollment by high school freshman and sophomore students at a community college is in excess of 25% of total dual enrollment by high school students at that community college. For FY 2020, the Maricopa Community Colleges reported that the 25% threshold was exceeded at 2 colleges. At Glendale Community College, 725 of 2,783 dual enrollment students (26.1%) were freshman and sophomore students. At Rio Salado College, 2,510 of 8,245 dual enrollment students (30.4%) were freshman and sophomore students. (Lydia Chew)

Arizona Community Colleges – Report on Workforce Development Expenditures – Pursuant to A.R.S. § 15-1472, the Arizona Community Colleges are required to report on their Proposition 301 workforce development expenditures by December 1 of every even-numbered year. The community colleges recently submitted their FY 2019 and FY 2020 report. Total reported expenditures were \$21.8 million for FY 2019 and \$27.8 million for FY 2020, which were used for workforce development and job training. Total revenues were \$20.8 million for FY 2019 and \$22.2 million for FY 2020. Unspent revenues were carried forward to the next fiscal year.

The report details each district's strategic initiatives and expenditures. The Proposition 301 revenues were used primarily for nursing, manufacturing, and construction programs, small business development centers, and equipment and technology costs. (Lydia Chew)

Arizona Community Colleges – Report on STEM and Workforce Programs – Pursuant to A.R.S. § 15-1464, the Arizona Community Colleges are required to report on their science, technology, engineering, and mathematics (STEM) and workforce program state aid expenditures by December 1 of every even-numbered year. The community colleges recently submitted their FY 2019 and FY 2020 report. Total reported expenditures were \$4.7 million for FY 2019 and \$6.8 million for FY 2020. Unspent revenues were carried forward to the next fiscal year.

In FY 2019, Maricopa and Pima did not receive funding. In FY 2020, Maricopa received \$1.6 million and Pima received \$400,000. In both FY 2019 and FY 2020, Pinal received \$96,500. Otherwise, community college districts received monies based on each district's Full-Time Student Equivalent enrollment.

The report details each district's strategic initiatives and expenditures. The STEM and Workforce Programs State Aid must be used for the following purposes:

- Partnerships with business and educational institutions.

Summary of Recent Agency Reports (Continued)

- Additional faculty for improved and expanded classroom instruction and course offerings.
- Technology, equipment and technology infrastructure for the advanced teaching and learning in classrooms or laboratories.
- Student services such as assessment, advisement and counseling for new and expanded job opportunities.
- The purchase, lease or lease-purchase of real property, for construction, remodeling or repair of buildings or facilities on real property.

(Lydia Chew)

Office of Economic Opportunity – Program Year 2019 Annual Report – Pursuant to A.R.S. § 41-5401, the Office of Economic Opportunity's Workforce Arizona Council (WAC) submitted its annual report on workforce development, which addresses performance metrics such as number of participants and statewide program costs.

In Program Year 2019 (July 2019 - June 2020), WAC reported \$307.8 million in expenditures on the following 5 workforce programs. The largest groups served were low income individuals, the long-term unemployed, English language learners, and single parents.

- Adult, youth, and dislocated worker programs provided career services and training to 16,953 individuals at an average cost of \$2,413 per person funded via the Department of Economic Security (DES).
- Adult education and literacy programs provided basic educational opportunities for 11,375 adults at an average cost of \$80 per participant funded via the Arizona Department of Education.
- Employment service offices, which provide one-stop assistance to job seekers, served 38,654 individuals at an average cost of \$372 per person funded via DES.
- Vocational rehabilitation programs provided services to 13,123 persons with disabilities at an average cost of \$3,322 per person funded via DES.
- The state's community colleges expended \$208.0 million of federal, state, and local funds on career and training services. (Ben Newcomb)

State Board of Education – Fiscal Impact of Changes to Minimum Course of Study – Pursuant to A.R.S. § 15-203, the State Board of Education is required to prepare a fiscal impact statement of any proposed changes to the minimum course of study or competency requirements for common schools or high schools and is prohibited from adopting any changes that will have a fiscal impact on school capital costs. The Board amended the minimum course of study to require instruction on the Holocaust and other genocides at least once in grades 7 and 8 and once in high school.

There is no anticipated fiscal impact to school capital costs as a result of these changes. (Lydia Chew)

Department of Education – Report on Results-Based Funding – Pursuant to A.R.S. § 15-249.08, the Arizona Department of Education (ADE) submitted a report on the allocation of results-based funding received by school districts and charter schools. Results-based funding is additional funding provided to schools with statewide assessment scores exceeding certain statutory thresholds. Awards are either \$225 or \$400 per student, depending on the income level of the school.

The majority of results-based funding must be used at the school that earned the funding for teacher and school leader salaries, hiring teachers, classroom supplies, and other strategies to sustain student outcomes at that school. A portion of results-based funding may also be used for expanding and replicating a quality school model. Schools that receive results-based funding must report the allocation of funds to ADE.

In FY 2020, ADE distributed \$72.1 million of Results-Based Funding awards to eligible LEAs. Of that amount, LEAs reported spending \$51.5 million, including \$41.3 million (80%) for teachers' compensation and professional development, \$4.5 million (9%) for classroom supplies, and \$5.7 million (11%) for school expansion. Any unspent funds may be carried forward. (Patrick Moran)

Department of Education – Report on Teacher Salaries – Pursuant to A.R.S. § 15-189.05C and 15-903I the Arizona Department of Education (ADE) recently submitted a report on changes in average teacher salaries reported by individual school districts and charter schools for FY 2021. ADE's reported average changes are not weighted by the size of the district or charter.

The report indicates that school districts, on average, reported a 0.6% increase in their average teacher salaries for FY 2021 and charter schools, on average, reported an 1.9% increase. The statewide average reported increase for districts and charters combined was 1.4%. The cumulative total increase since FY 2018 is 16.5% among school districts, 15.7% among charters, and 15.8% statewide. (Patrick Moran)

State Mine Inspector – Report on Abandoned Mines Safety Fund Expenditures and Contributions – The State Mine Inspector is required by A.R.S. § 27-131 to establish a program to address public safety hazards at abandoned mines. A.R.S. § 27-131 created the Abandoned Mines Safety Fund (AMSF) to fund the program. The Mine Inspector submitted its annual report detailing the contributions to the AMSF and the expenditures by the fund during FY 2020.

Summary of Recent Agency Reports (Continued)

The State Mine Inspector reports that the AMSF received no new revenue in FY 2020. The State Mine Inspector closed 3 mine sites during FY 2020, none of which were closed using AMSF monies or General Fund monies. Of the 3 mine sites closed in FY 2020, none were located on state trust land. The AMSF's carry-forward balance totaled \$134,800 at the end of FY 2020. The Mine Inspector has completed preliminary planning for closure of 19 mine sites in FY 2021, at an estimated cost of \$19,000. In addition to the AMSF, the State Mine Inspector also receives a General Fund appropriation (\$194,700 in FY 2020) for the same purpose. (Henry Furtick)

Commission for Postsecondary Education – Report on the Arizona Teacher Student Loan Program – A.R.S. § 15-1782 requires the Commission for Postsecondary Education to report annually on the Arizona Teacher Student Loan Program (ATSLP).

ATSLP provides forgivable loans to eligible students attending any regionally or nationally accredited institution in Arizona (public or private) who agree to a service commitment to teach in an Arizona public, rural, low-income or tribal school.

In FY 2020, ATSLP had 49 applicants and disbursed 43 loans. This total includes 24 new loans and 19 renewals. The total disbursement was \$217,364. Eleven recipients attend private postsecondary institutions, 31 attend public universities and 1 attended a public community college.

The commission is responsible for collecting retention data for loan recipients. At the conclusion of FY 2020, 412 students have participated in the ATSLP. Of those, 77 are in student teaching or in the 12-month grace period, 43 are teaching in a public K-12 school in Arizona, 228 had their loan forgiven for completing their teaching service, and 64 are currently or have been in repayment. (Alexis Page)

Secretary of State – Report on Presidential Preference Election Reimbursement - Presidential Preference Elections (PPE) require a separate ballot for each recognized political party and no other election can appear on the ballot. A.R.S. § 16-250 establishes the county reimbursement rate at \$1.25 per active registered voter.

For FY 2020, the Legislature elected to provide a one-time appropriation in FY 2020 to counties at a higher reimbursement rate than \$1.25. Beyond the \$4,408,100 appropriated in the Secretary of State (SOS) base FY 2020 election budget for the PPE, the Legislature appropriated an additional \$2,616,900 for the PPE election in FY 2020. This resulted in a total appropriation of \$7,025,000 for the March 2020 PPE.

Counties were to receive the lesser of the following amounts: the county's actual cost for the election or the amount calculated based on active registered voters as of January 2, 2020: \$1.74 per voter for counties with more than 500,000 active voters, \$1.60 per voter for counties with 200,000-500,000 active voters, \$1.90 per voter for counties with 100,000-200,000 active voters, \$2.00 per voter for counties with 50,000-100,000 active voters, \$2.10 per voter for counties with 12,000-50,000 active voters, and \$2.40 per voter for counties with 12,000 active voters or fewer.

As required by Laws 2020, Chapter 58, Section 103, on or before December 31, 2020, the SOS was to report the reimbursements made pursuant to this section. The reimbursement amounts for Apache, Coconino, Greenlee, Pima, and Santa Cruz counties were based on the calculation of active voters, but the remaining counties had a reimbursement based on their estimated costs.

The total maximum reimbursement cost was determined to be \$6,979,700 under the per voter formula. SOS indicated reimbursement requests based on actual county costs totaled \$6,371,400. Given that some counties' costs exceeded their per voter formula amount, SOS reimbursed a lesser amount of \$6,146,200 for the PPE. (Maggie Rucker)

Supreme Court – Report on Adult Probation Services Fund and the Juvenile Probation Fund – Pursuant to a General Appropriation Act footnote and A.R.S. § 12-262, the Administrative Office of the Courts (AOC) reported on the FY 2020 actual, FY 2021 estimated, and FY 2022 requested amounts for the following: 1) the number of authorized and filled case carrying and non-case carrying probation positions by county; 2) the total receipts and expenditures by county and fund source for each of the probation Special Line Items (SLI), including the Personal Services expended from each revenue source of each account; and 3) the amount of monies from the probation SLIs that the AOC does not distribute as direct aid to counties. The figures in this report are for all counties except Maricopa as the state does not pay any of that county's costs of probation.

Adult Standard Probation

Adult Standard Probation state expenditures for county probation officers statewide were \$43.9 million in FY 2020, of which \$16.4 million were General Fund monies and \$2.9 million were non-General Fund state expenditures. The remaining \$24.6 million were county expenditures. These monies funded 251.5 case carrying and 340.0 non-case carrying positions. AOC estimates total expenditures of \$46.6 million in FY 2021 and \$48.3 million in FY 2022.

Summary of Recent Agency Reports (Continued)

Adult Intensive Probation

AOC reports statewide Adult Intensive Probation state expenditures for county probation officers of \$10.7 million in FY 2020, of which \$10.0 million were General Fund monies and \$630,600 were non-General Fund state expenditures. These monies funded 93.0 case carrying and 58.7 non-case carrying positions. AOC estimates total expenditures of \$12.2 million in FY 2021 and \$13.0 million in FY 2022.

Juvenile Standard Probation

Juvenile Standard Probation state expenditures for county probation officers statewide were \$17.0 million in FY 2020, of which \$3.3 million were General Fund monies. The remaining \$13.7 million were county expenditures. These monies funded 48.7 case carrying and 311.9 non-case carrying positions. AOC estimates total expenditures of \$18.0 million in FY 2021 and \$18.1 million in FY 2022.

Juvenile Intensive Probation

AOC reports statewide Juvenile Intensive Probation state expenditures for county probation officers of \$4.8 million in FY 2020, all of which were General Fund monies. These monies funded 37.9 case carrying and 26.1 non-case carrying positions. AOC estimates total expenditures of \$5.4 million in FY 2021 and \$5.5 million in FY 2022. (Geoffrey Paulsen)

Arizona Department of Transportation – Report on Motor Vehicle Fleet – Pursuant to A.R.S. § 41-803R, the Arizona Department of Transportation reported on the FY 2020 year-end inventory of state-owned alternative fuel vehicles. Of the 12,309 state vehicles, 7,624, or 62%, capable of using alternative fuels.

Of the 5,377 state vehicles subject to the alternative fuel vehicle requirements, 3,721, or 69%, are alternative fuel vehicles. This percentage is (2)% less than the prior year but exceeds the 40% target established by statute. (Law enforcement and certain other vehicles are exempt.) Statute also requires 90% of the state vehicles in Maricopa County to be capable of using alternative fuels. The state reports that 75% of its Maricopa County vehicles subject to the requirements are alternative fuel vehicles. This is decrease of (4)% from the prior year.

A.R.S. § 41-803G additionally requires that 75% of new vehicle purchases in Maricopa, Pima, and Pinal Counties be capable of using alternative fuels. Of the 222 eligible vehicles purchased in these counties in FY 2020, 94% were capable of using alternative fuels.

Notwithstanding the number of vehicles capable of using alternative fuel, only 0.6% of the state fleet's fuel budget was spent on alternative fuels. (Jordan Johnston)

Arizona State University – Report on University Campuses – Pursuant to A.R.S. § 15-1601 Arizona State University (ASU) has reported required financial and operational information for each of the university's campuses.

- Total capital expenditures in FY 2019 and FY 2020 (in millions):

	<u>FY 2019</u>	<u>FY 2020</u>
Tempe	\$216.6	\$202.5
Downtown	25.5	57.6
West	3.4	1.0
East	13.2	3.0
Multiple Campuses	<u>3.7</u>	<u>7.9</u>
TOTAL	\$262.4	\$272.0

- 21st day Full-time Equivalent (FTE) student and a head count of students enrolled in one or more courses by campus:

	<u>FTEs</u>	<u>Headcount</u>
Tempe	74,954	100,504
Downtown	23,529	41,758
West	10,215	24,210
East	<u>8,306</u>	<u>18,950</u>
TOTAL	117,004	185,422

- Revenues: \$931.9 million (ASU excluded all non-appropriated revenues, including the non-appropriated share of tuition revenues, from the reported amounts). ASU did not allocate this amount by campus.
- ASU is also required to report any long-term capital or expansion plans for each campus. The university has made available its [Campus Master Plans](#) and highlighted its FY 2022 Capital Improvement Plan, which includes plans to construct a new Multipurpose Arena on the Tempe Campus, renovate the Bateman Physical Sciences Center on the Tempe Campus, and tenant improvements to a university facility being constructed by the City of Mesa. (Morgan Dorcheus)

Arizona Economic Trends

December 2020

Appendix A

Page:

2.....Total Non-Farm Employment

Average Hourly Earnings – Private Sector

3.....State Sales Tax Collections – Retail Category

State Sales Tax Collections – Contracting Category

4.....Residential Building Permits

Rolling 4-Week Withholding Total

Initial Unemployment Insurance Weekly Claims

Continued Unemployment Insurance Weekly Claims

5.....SNAP Recipients

AHCCCS Recipients

HURF Revenue

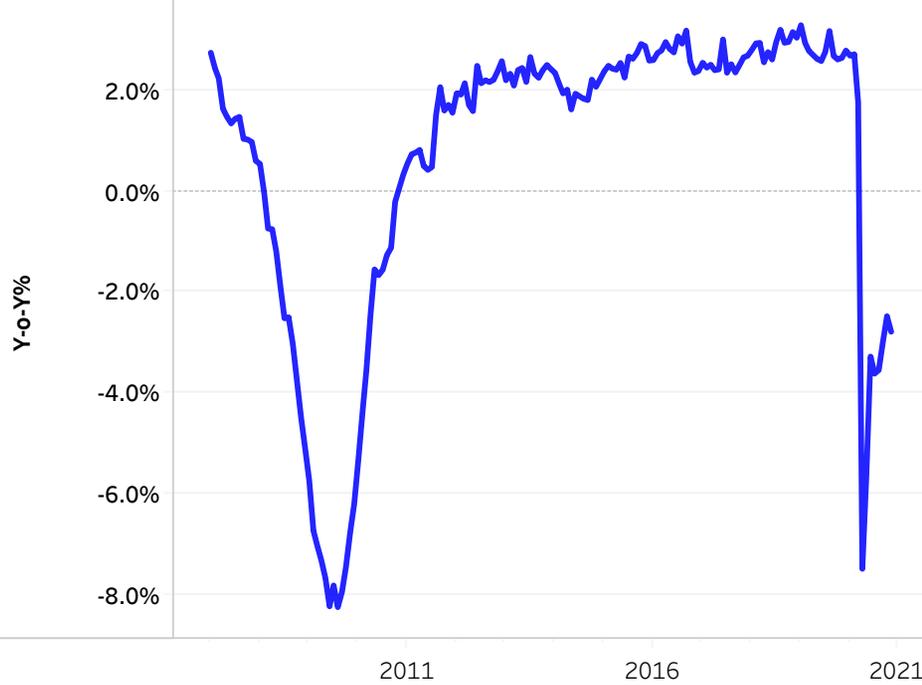
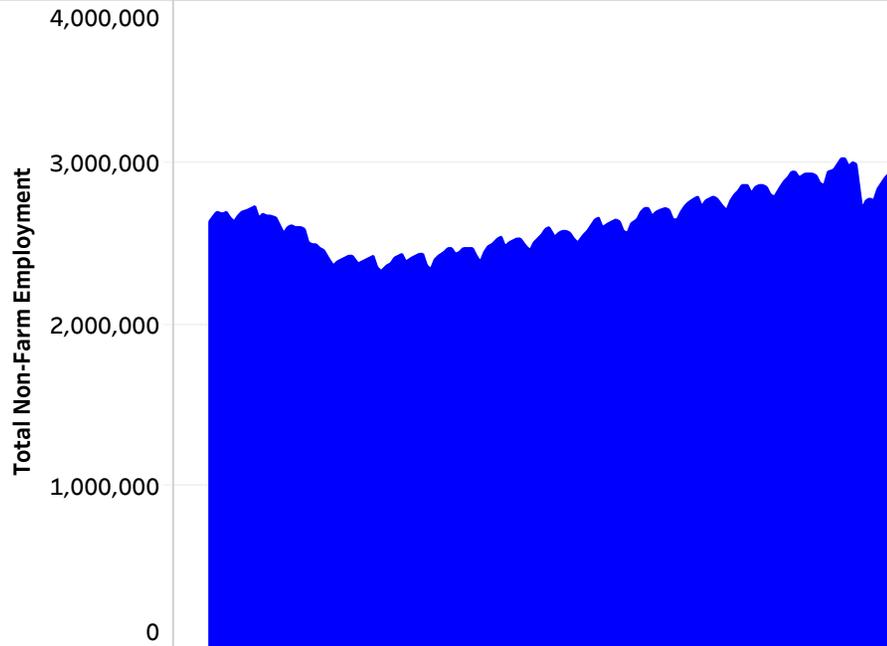
Sky Harbor Total Passengers

6.....Arizona Hotel Occupancy

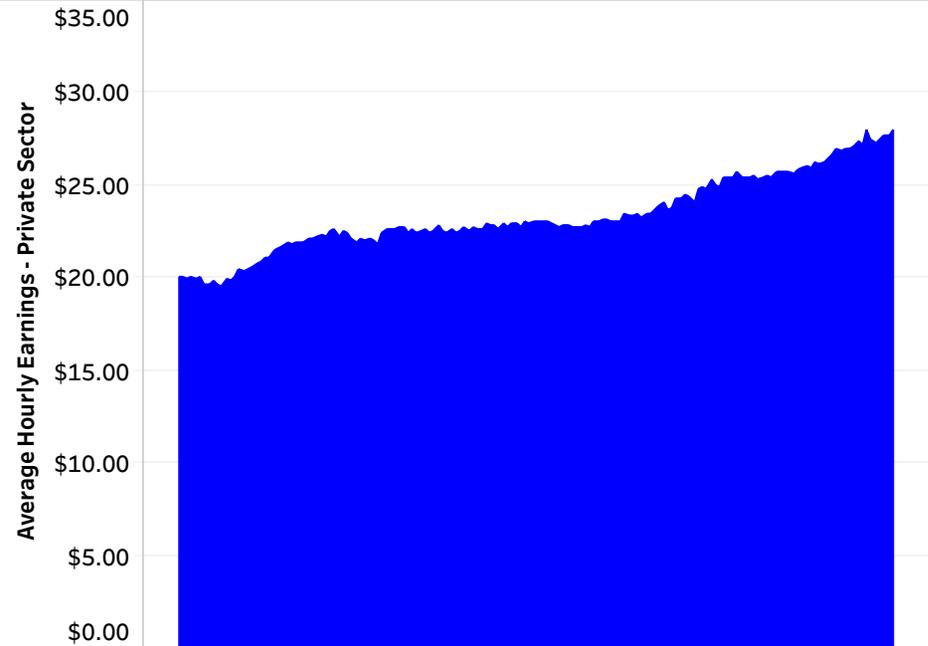
Arizona OpenTable Daily Reservations

[Link to Most Recent Arizona Economic Trends Tableau Dashboard](#)

Total Non-Farm Employment

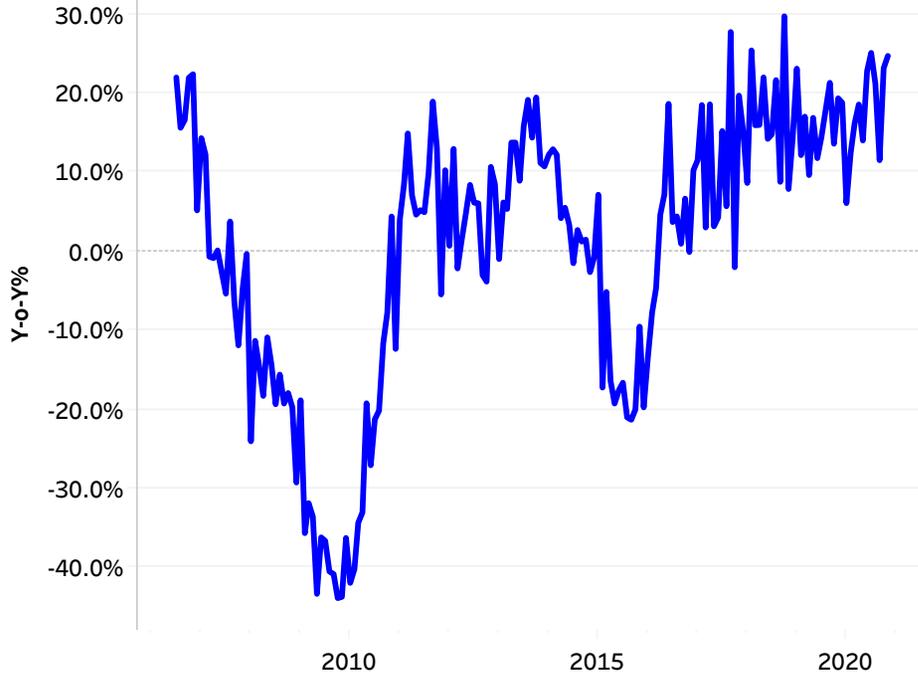
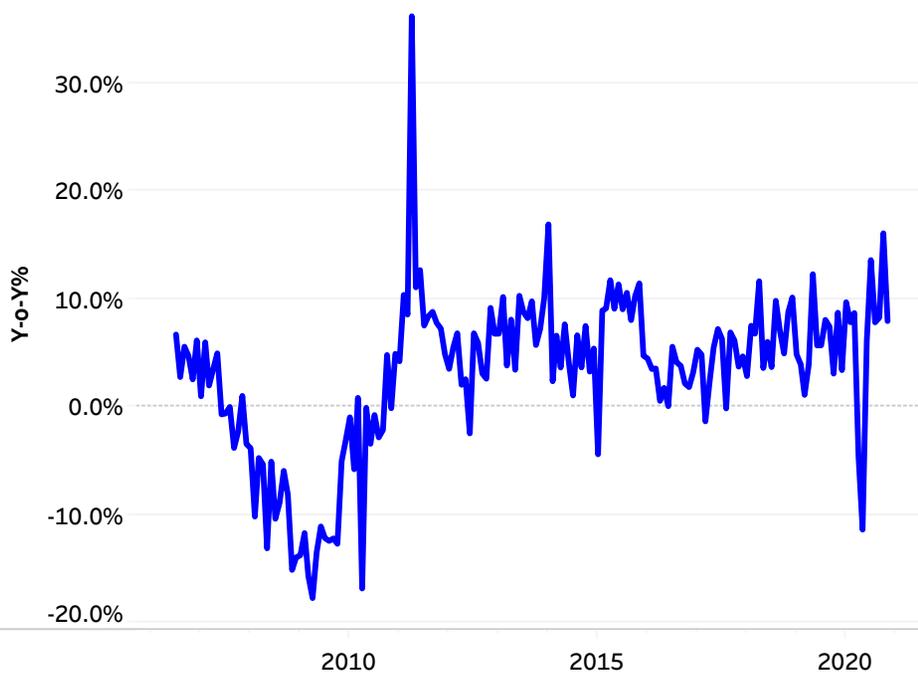
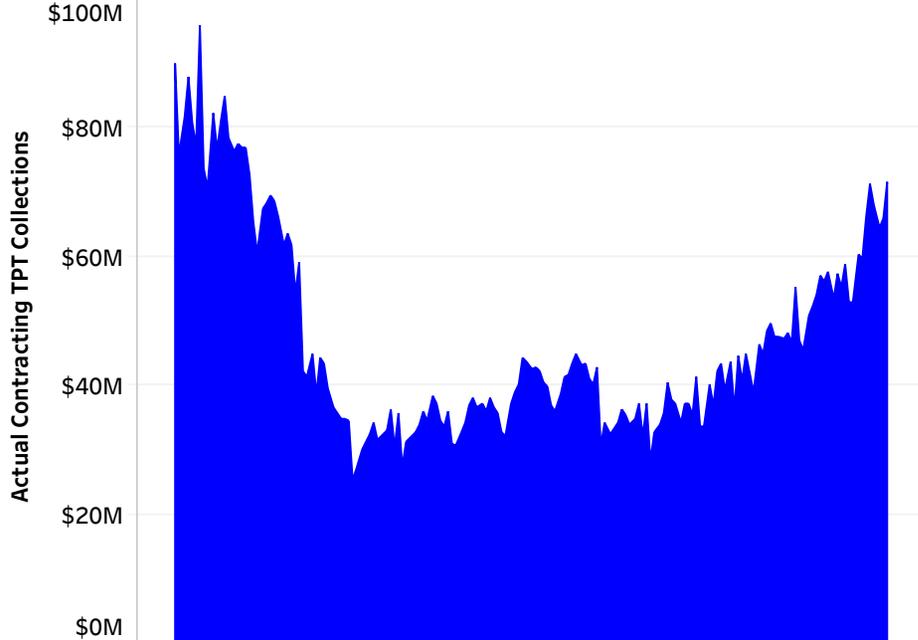
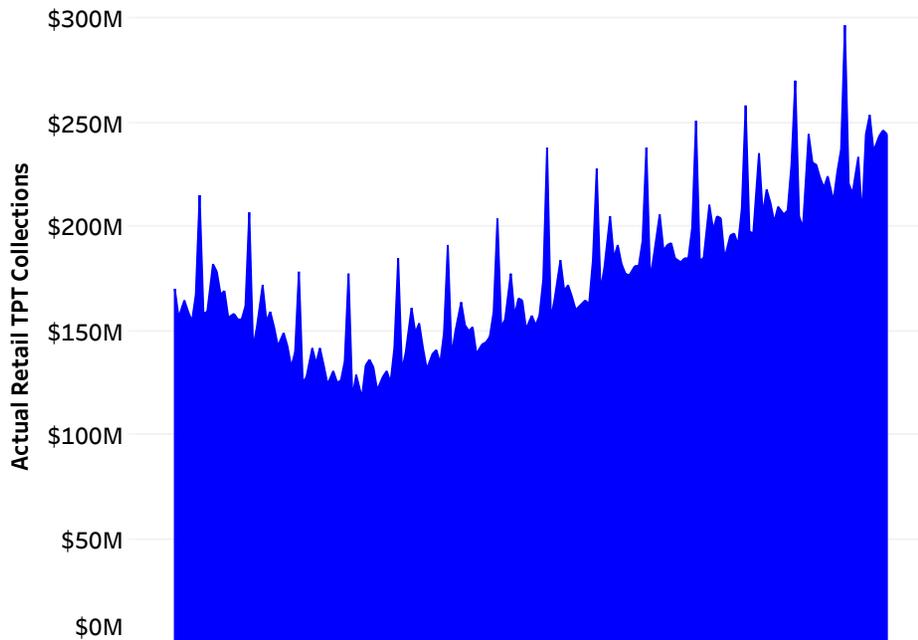


Average Hourly Earnings - Private Sector

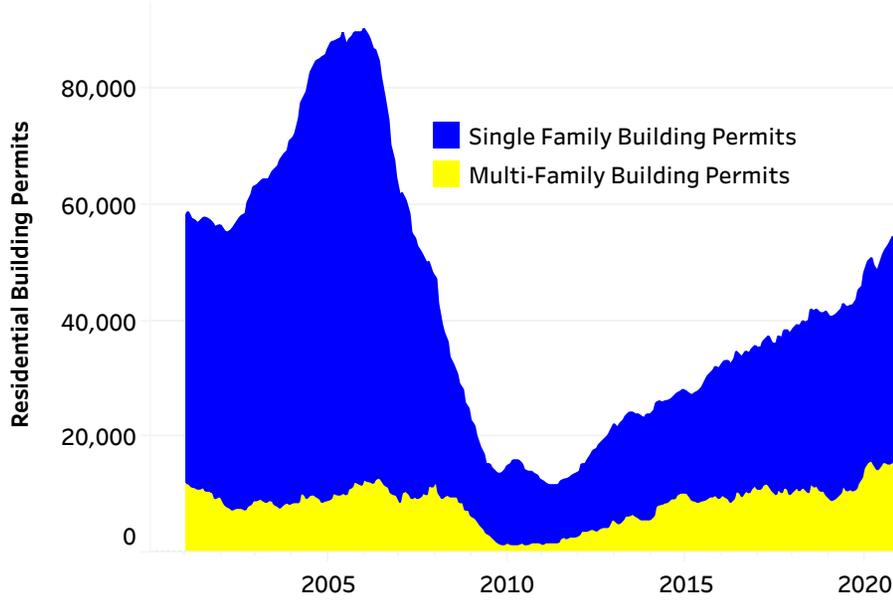


State Sales Tax Collections - Retail Category

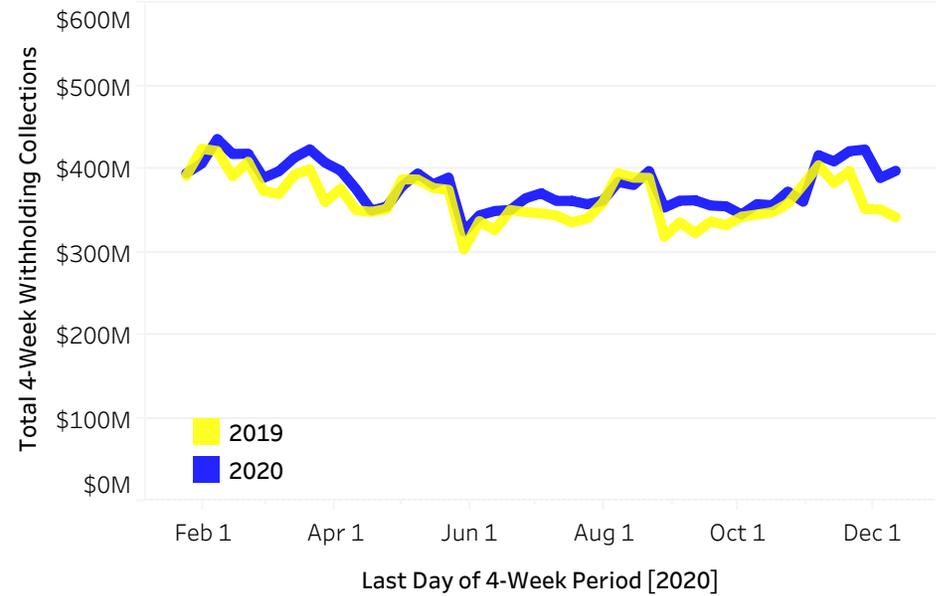
State Sales Tax Collections - Contracting Category



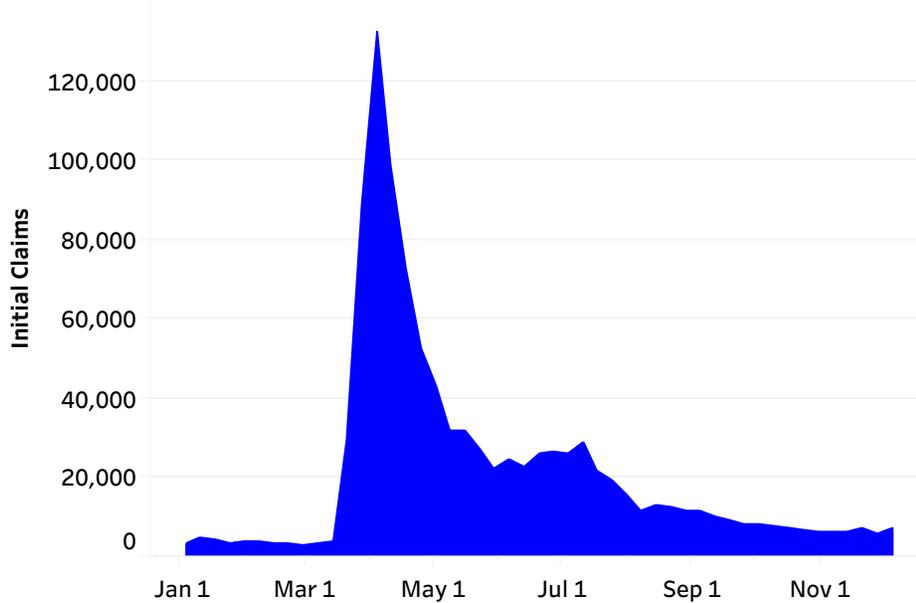
Residential Building Permits



Rolling 4-Week Withholding Total

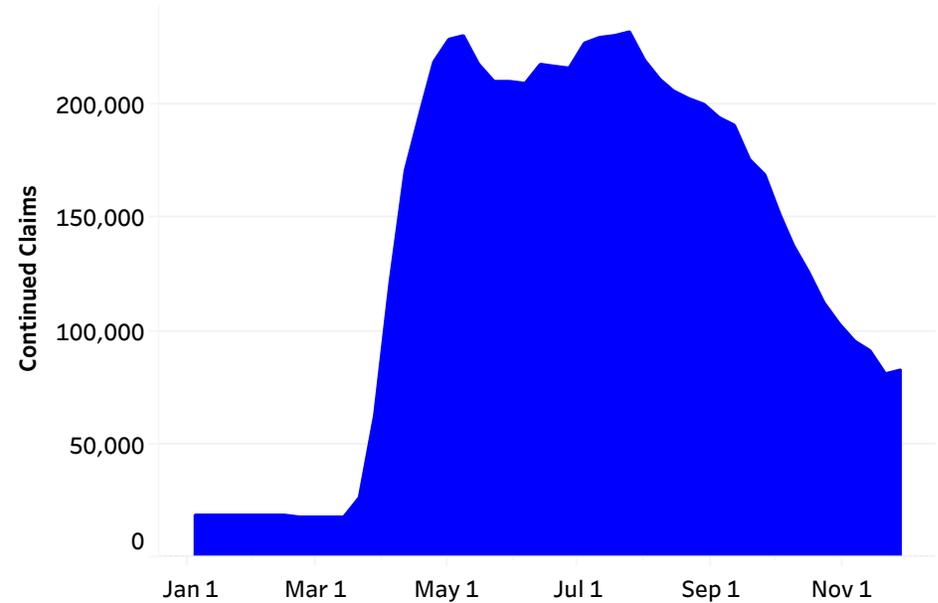


Initial Unemployment Insurance Weekly Claims



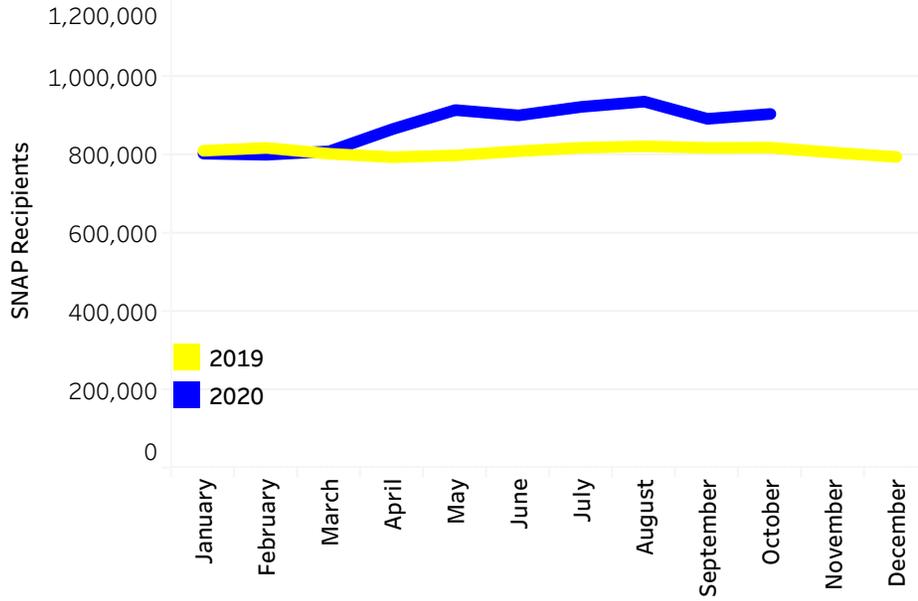
Reported Unemployment Insurance Initial Claims and Continued Claims do not include claims associated with the federally funded Pandemic Unemployment Assistance (PUA) program.

Continued Unemployment Insurance Weekly Claims

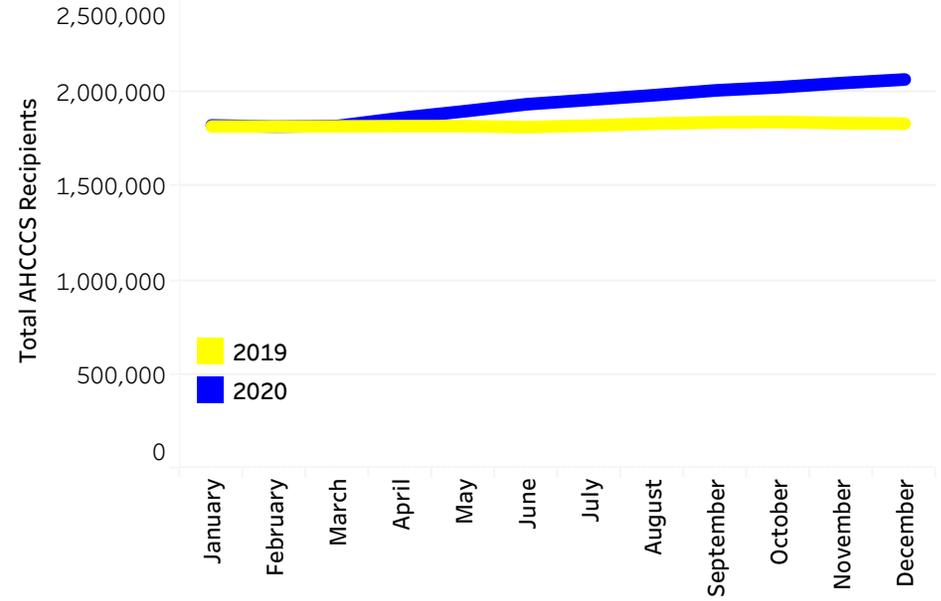


Reported Unemployment Insurance Initial Claims and Continued Claims do not include claims associated with the federally funded Pandemic Unemployment Assistance (PUA) program.

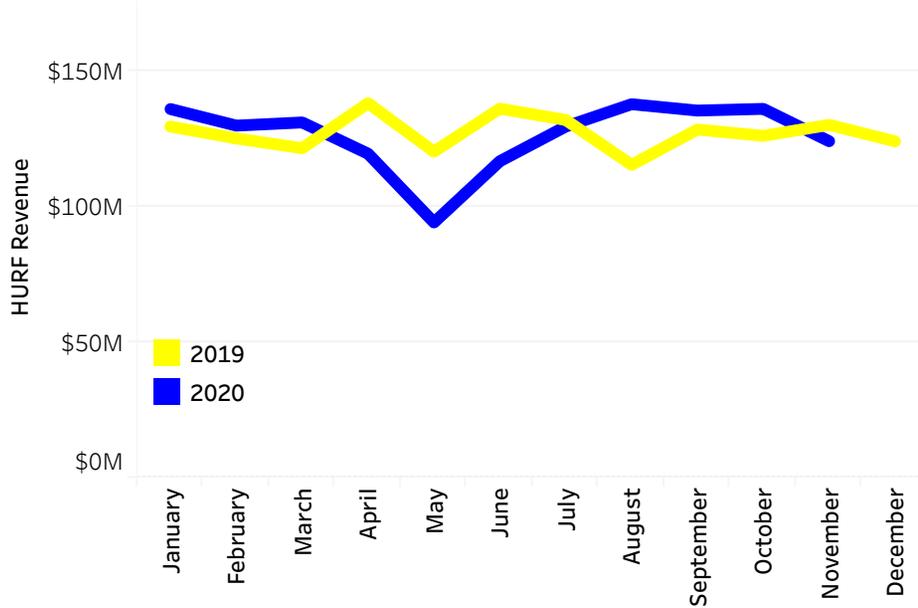
SNAP Recipients



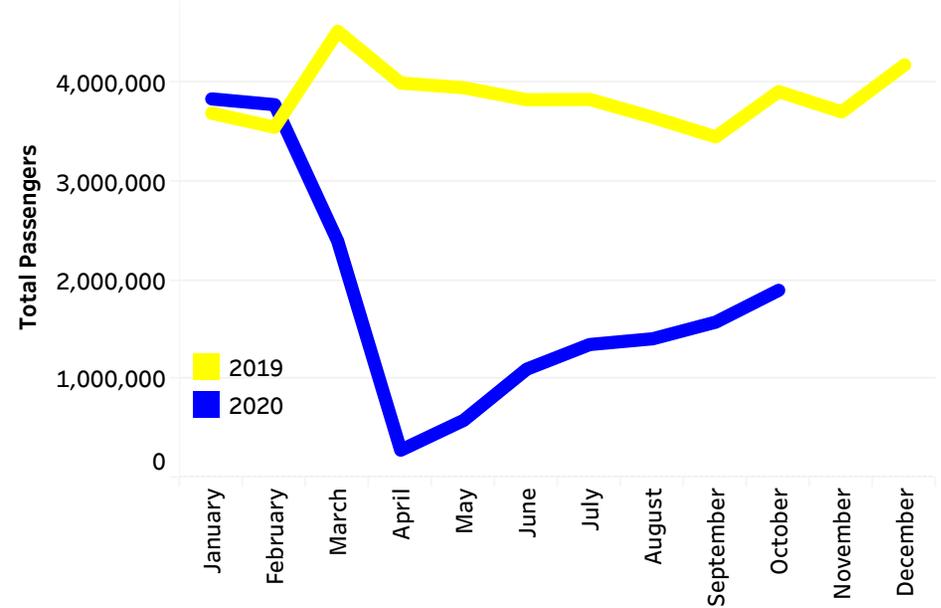
AHCCCS Recipients



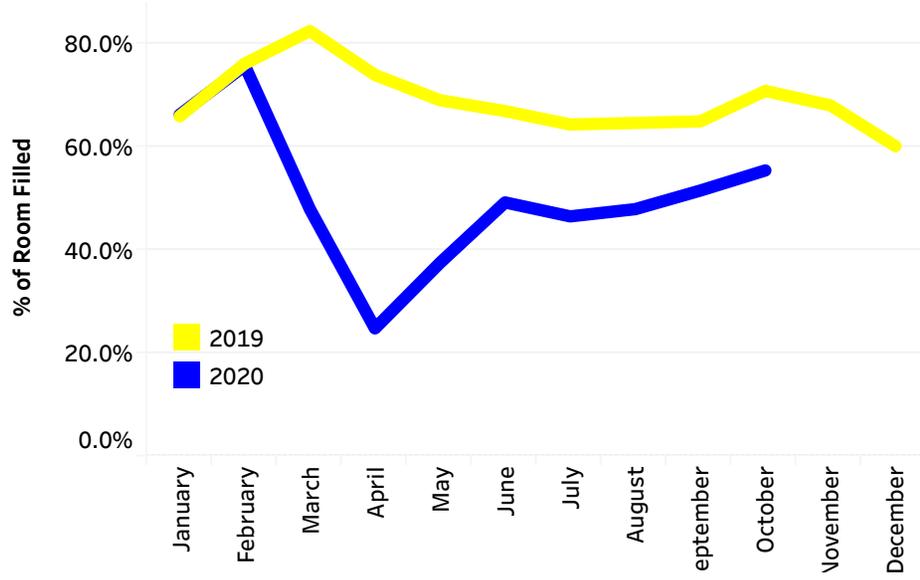
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