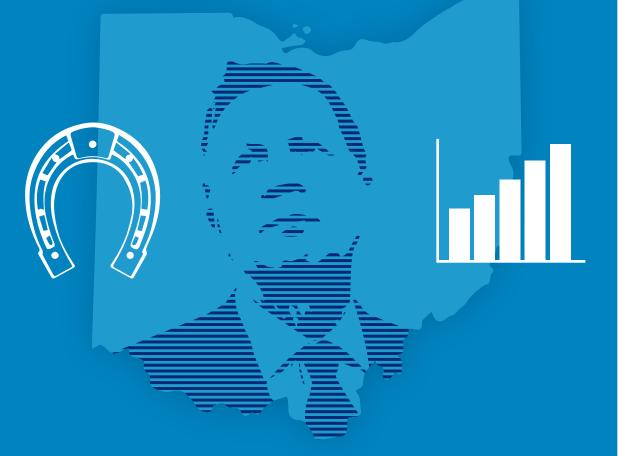
FEBRUARY 2019 | OPPORTUNITY OHIO

LUCKY OR GOOD?



An Analysis of John Kasich's Tenure as Ohio's Governor

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Introduction

s New York Yankee Lefty Gomez once said, "I'd rather be lucky than good." That sentiment perfectly encapsulates Governor John Kasich's eight years in office. Partisans and sycophants will debate whether Governor Kasich was as great as he thinks he was or fell far short of his own press releases, but one thing is certain: Governor Kasich was extremely lucky to have entered office at the beginning of a global recovery, to serve eight entire years without experiencing a national recession, and to leave before the expected overdue cyclical national or global recession hits and before the true costs of his policy decisions impact taxpayers.

Given those realities, it was hard for any governor in America over the last eight years to fail. Every governor faced the same headwinds and tailwinds. Every governor believes he or she innovated more than other governors. Every governor thinks his or her way of doing economic development surpassed the work in other states. Every governor argues that his or her tax and spending decisions hit the magic formula. Every

governor claims that his or her approach to technology and creating the environment for the jobs of tomorrow transcended what was happening in the other states.

Notwithstanding spin, the only thing we can do is analyze the data and make conclusions based on the results of those analyses. As the data in this report shows, Governor Kasich, at best, was a mediocre governor on the big issues. If he did innovate more, do economic development better, found the magic formula, and put Ohio at the front of the pack on technology, those achievements can't be proved by any hard data.

The one thing Governor Kasich clearly did well, especially over the past three years, is promote himself shamelessly as the anti-Donald Trump of the Republican Party. Shockingly and disappointingly, his desire for media attention even went so far as to try to steal the spotlight from incoming Governor Mike DeWine by sending a press release out about his new job at CNN at 12:30 p.m. as Governor DeWine was being inaugurated.

Those Dogs Just Don't Hunt

Balancing the Budget— Because You Are Required to Do So

ver the years and increasingly in his quest for the presidency, Governor Kasich promoted his fiscal stewardship of Ohio, especially his eight-year record of balancing Ohio's state budget. With yearly federal deficits and the national debt increasing, Governor Kasich uses this factoid to promote his qualifications for balancing the federal budget, as well. The only problem with his claim is that balancing the Ohio budget is a *constitutional requirement* of every governor and legislature. Thus, Governor Kasich had no choice but to balance Ohio's budget, as has every governor before him since the balance budget requirement was added to Ohio's Constitution.

Similarly, Governor Kasich likes to forearm shiver his predecessor, Ted Strickland, for leaving just \$0.89 in the rainy fund. Given that the entire point of a rainy day fund is to provide for an emergency when is rains too hard, the fact that Governor Strickland, along with a Republican-led legislature, used nearly all of Ohio's \$1 billion rainy day fund to balance the budget as required during the Great Recession shouldn't have become such a bragging point.

Nonetheless, Governor Kasich rightly should be

credited for rebuilding Ohio's rainy day fund to over \$2.7 billion, but will Governor Kasich criticize Governor DeWine when he uses those funds to balance the budget during the recession expected to hit sometime in the next four years?

Ohio's Regulatory Burden Grew Over the Past Eight Years

With great fanfare, Governor Kasich rolled out the Common Sense Initiative (CSI) in 2011. The purpose of CSI was to reduce the regulatory burden on Ohioans and their businesses through the use of common sense. As background, Ohio has a fairly significant regulatory burden as evidenced by the lengths of the Ohio Revised Code (ORC) and the Ohio Administrative Code (OAC). The ORC runs over 75,000 pages contained in 80 books. The OAC is 31,275 pages long requiring 32 printed books. It would cost a small business owner roughly \$20,500 for all 110 books with over 100,000 pages of the ORC and OAC, with an annual update cost of \$10,000. Because of Ohio's heavy regulatory burden, businesses must spend millions on lawyers, lobbyists, accountants, and consultants to ensure compliance.

Keep in mind, in addition to the ORC and OAC are the regulatory requirements of the 3,700 local taxing jurisdictions. Needless to say, Ohio simply isn't an attractive place for businesses due to its high regulatory burden.

As shown in the chart at right, it appears that, instead of decreasing regulation as promised, Governor Kasich's Administration *increased* the overall number of regulations on Ohioans and their businesses. As CSI managed to rescind roughly 1,308 regulations, other parts of the Kasich Administration promulgated approximately 1,717 new regulations. Thus, unlike the "two rescinded for every one enacted" pledge of the Trump Administration, Governor Kasich's team did the reverse: three new regulations for roughly every two regulations rescinded.

No matter how you spin it, Ohio's regulatory burden <u>GREW</u> during Governor Kasich's eight years.

Errors and Bad Economics Drove Governor Kasich's Severance Tax Hike Assaults

Lastly, to great fanfare, Governor Kasich announced his plan to hike the severance tax on Ohio's energy entrepreneurs. Unfortunately for him, his team assumed 95 percent of the tax revenue would come from oil, not natural gas. Thus, his original projections were horribly off, as Ohio's Utica Shale formation doesn't possess much oil; rather, it is a heavy natural gas formation, as the chart on the next page shows. Governor Kasich's announcement smacked of the typical hubris that emanated from his office, as it assumed (1) energy companies couldn't just move their rigs across the border to Pennsylvania or West Virginia, let alone to other states, and (2) exploration companies wouldn't find even better deposits of oil and gas elsewhere. Both assumptions proved to be false when Ohio's rig count plummeted after Governor Kasich launched his assault and, in the years since, far better deposits have been found elsewhere.

Governor Kasich then famously predicted Ohio's Utica Shale formation would produce a trillion dollars in revenue for just one company, Chesapeake Energy.

GOV. KASICH INCREASED REGULATIONS IN OHIO

Net Change in Regulations Since 2011



2012 2013 2014 2015 2016 2017 2018

Year	Reviewed	Rescinded	New
2012	1,519	86	268
2013	1,543	49	219
2014	2,476	124	216
2015	2,316	202	154
2016	2,309	247	225
2017	2,613	341	380
2018	2,195	259	255
Total	14,971	1,308	1,717

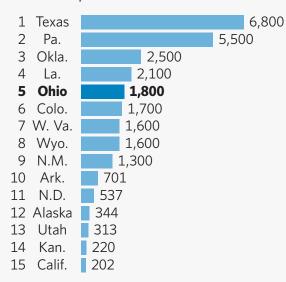
SOURCE: COMMON SENSE INITIATIVE, HTTP://WWW.GOVERNOR.OHIO.GOV/CSI

Not only did Chesapeake Energy fail to hit a trillion dollars in production, it pulled out of Ohio last year by selling all of its wells and acreage for \$2 billion—a mere sliver of a trillion dollars and a fraction of its investment in Ohio. The reality is that from 2010 to 2018, using very generous prices, the total revenue from Ohio's oil and natural gas production totaled just under \$40 billion. Assuming every year produced as much revenue as 2018 likely did, it would take 94 more years for every oil and natural gas well in Ohio to generate \$1 trillion in revenue.

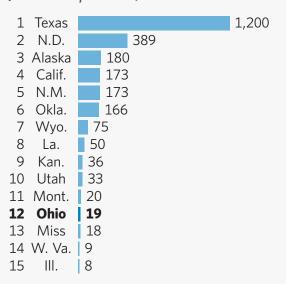
Let's hope the DeWine Administration doesn't repeat Governor Kasich's mistake of attacking Ohio's energy entrepreneurs and further undermining exploration and development of Ohio's Utica Shale formation.

OHIO RANKS FAR HIGHER IN NATURAL GAS THAN OIL

Top 15 Natural Gas-Producing States (Billions of Cubic Feet)

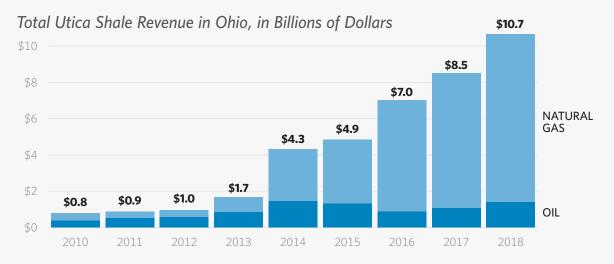


Top 15 Oil-Producing States (Millions of Barrels)



ENERGY BUSINESS BETTER OUTSIDE OHIO

Governor Kasich predicted Ohio's Utica Shale would generate \$1 trillion in revenue for just one company, Chesapeake Energy. Based on 2018 revenue of \$10.7 billion **from all of Ohio's Utica wells,** it would have taken **94 years** to reach that amount.



"It Could Be Worse"-isms Belong on the Ash Heap of Excuses

Ohio's Job Growth Got Weaker the Longer JobsOhio Did Its Work

or eight years, those of us who understand data have had to watch as Governor Kasich misled Ohioans, the media, and voters in the 2016 primary states. Specifically, Governor Kasich liked to talk about the raw number of jobs added during his tenure knowing full well that such a number lacked proper context. As the seventh largest state in America, anemic job growth in Ohio still would look big to the majority of other much-smaller states (e.g., New Hampshire). To make a proper apples-to-apples comparison of the data, you need to normalize for population differentials. To do that, you have to look at the percentage change in private sector job growth over time.

Using the proper measuring stick, Ohio's private sector job growth during the Kasich years has been mediocre at best. According to the U.S. Bureau of Labor Statistics, from January 2011 until December 2018, Ohio's private sector increased by 13.4 percent, which ranked as the 24th best in America over that period of time. At right are the annual private sector job numbers for each of Governor Kasich's years and his rank among the fifty states when doing a proper comparison.

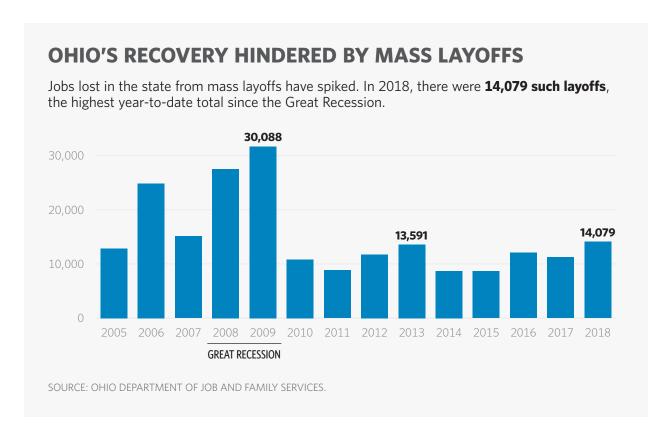
KASICH'S JOBS RECORD

	Private Sector Jobs	Net Job Growth	
Year(s)	Added	%	Rank
2011	91,300	2.4%	No. 15
2012	76,500	1.5%	No. 29
2013	82,200	1.5%	No. 29
2014	87,100	2.1%	No. 29
2015	58,300	1.5%	No. 34
2016	41,200	0.9%	No. 35
2017	30,000	0.6%	No. 41
2018	105,300	2.0%	No. 17
2011-'18	571,900	13.4%	No. 24

SOURCE: BUREAU OF LABOR STATISTICS.

Other than in 2011 based largely on policies from the Strickland Administration and in 2018 due to federal tax and regulatory reforms, Ohio's private sector job growth never hit a higher ranking than 29th during Governor Kasich's entire tenure.

Contrary to what Governor Kasich would have you believe, his raw private sector job total (571,900) isn't



even the most among Ohio governors. With a smaller population base in the 1990s, Ohio added 608,300 private sector jobs during George Voinovich's tenure and that achievement occurred despite a one-year recession loss of 58,600 private sector jobs in 1991.

Governor Kasich has been fortunate to serve his entire tenure during a national expansion, which helped Ohio's private sector attain the peak raw number of 4.85 million jobs (42.6 percent employed) our state last hit in March 2000 when Ohio contained roughly 500,000 fewer people. When adjusting for Ohio's population growth since 2000 to determine when Ohio's private sector will employ the same percentage of Ohioans as it did in March 2000, we still need to add 122,102 jobs before truly hitting the March 2000 peak. We currently estimate that will occur in the second half of 2020 assuming there isn't a recession.

Nonetheless, one of the reforms Governor Kasich states he is most proud of is the creation of the quasi-public, opaque economic development entity, JobsOhio. Governor Kasich credits Ohio's job growth to the work done by JobsOhio. The only problem with

that claim is that, instead of getting stronger, Ohio's private sector job growth got <u>WEAKER</u> the longer JobsOhio was on the job.

From 2015 to 2017, Ohio's private sector job growth was spiraling downward even though JobsOhio had been hard at work spending hundreds of millions of dollars to bring jobs to Ohio. In fact, despite the ongoing efforts by JobsOhio that should have gotten better results the longer it operated, Ohio added over 100,000 *fewer* private sector jobs in Governor Kasich's second term than in his first term. Thankfully, President Trump and a Republican Congress passed major federal tax reform and greatly reduced the federal regulatory burden for employers in 2017, thereby resulting in a jobs boom in Ohio and elsewhere in 2018.

Even that growth was tempered in 2018, however, by the highest number of mass layoffs by employers in Ohio since 2009.

At the end of the day, the only thing Governor Kasich can legitimately say about JobsOhio is that, without it, it could have been a lot worse in Ohio.

Ohio's Opioid Overdose Death Rate Skyrockets Despite Medicaid Expansion

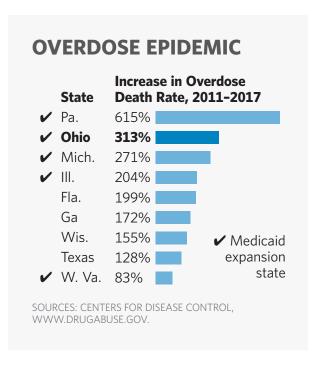
I'll address Governor Kasich's Medicaid expansion more fully below, but a brief discussion of it belongs in this section, as well. One of Governor Kasich's strongest claims about Medicaid expansion is that it allowed Ohio to dedicate more funding to addiction treatment, which he claims is why Ohio's overdose death rate finally dropped in 2018. The problem with this claim is that the data supports a conclusion making the exact opposite point.

Specifically, Governor Kasich expanded Medicaid in the Fall of 2013. What exactly happened to Ohio's overdose death rate since that time? In the years before the expansion, it went from 10 per 100,000 in 2010 to just 14.6 in 2013. As the Medicaid expansion kicked in in 2014, the rate jumped to 19.1 followed by another jump in 2015 to 24.7. It only got worse. In 2016, the overdose death rate exploded to 32.9 and then skyrocketed to 46.3 in 2017.

Comparing Ohio along with four other Medicaid expansion states to four states that did not expand Medicaid, it appears the overdose death rate increased far more in the Medicaid expansion states than it did in the non-Medicaid expansion states.

West Virginia's already sky-high overdose death rate in 2011 of 31.5 surpassed the 2017 rate for every state in the table above except Ohio and Pennsylvania, so its "small" overall increase is grossly misleading. Though purely anecdotal and speculative, one treatment provider indicated to me that he thought Medicaid expansion actually helped to *increase* the overdose death rate because of how addicts would cycle through the time-limited addiction services until they essentially died via an overdose.

Nonetheless, it looks like the rate is thankfully coming down in 2018, but experts and coroners don't attribute that drop to Medicaid expansion (i.e., treatment). Rather, two other primary reasons are cited. First, as



noted in the Wall Street Journal:

One factor appears to be the short-lived appearance of carfentanil, an opioid with up to 100 times the potency of fentanyl. Carfentanil's sudden mid–2016 arrival drove a surge in Ohio fatalities there, but local coroners say carfentanil-linked deaths dropped dramatically a year later.

The other factor cited is the prevalence of naxolone, an overdose-reversal drug. Given the life-saving nature of naxolone, enormous efforts went into getting that drug into the hands of first responders and citizens. That means people are still overdosing, but fewer of them are dying because they are being saved by naxolone, which has nothing to do with Medicaid. Ultimately, like JobsOhio, the most Governor Kasich can say about Medicaid expansion's impact on the overdose death rate is that it could have been worse, which frankly isn't provable or much to plant a flag into.

Not the Head of His Class

hen Governor Kasich got elected in the historic wave election of 2010, fifteen other Republican governors were elected with him. While I acknowledge you can use any category to compare these governors, I submit the top three are:

- (1) Net percentage private sector job growth
- (2) Population growth, and
- (3) Per capita spending growth

Why those three? Because prosperity comes to citizens via the paycheck they earn in a job. More jobs leads to more competition for workers and higher wages. Similarly, people vote with their feet so if a state is economically strong, it will attract citizens from other states seeking greater opportunities. Lastly, sound fiscal stewardship is a critical component of managing a state, as higher spending requires higher taxes and burdens on employers and citizens.

Using these three metrics, where did Governor Kasich place in the Class of 2010? A virtual tie with Wisconsin Governor Scott Walker for ninth out of sixteen. Among all governors during his tenure, Governor Kasich came in 30th place; meaning, he came in smackdab in the middle—the very definition of mediocre. He landed in 24th place in private sector job growth and 25th in per capita state spending, but dropped to 38th place for population growth given that, excluding births, Ohio continued to lose people over his eight years. The best three Republican governors taking

office in 2010 were Florida's Rick Scott (3rd overall), South Carolina's Nikki Haley (7th), and Tennessee's Bill Haslem (9th).

The reality is that Governor Kasich has left Ohio in a fiscal mess due to his expansion of Medicaid. Medicaid now absorbs nearly 50 percent of the state budget, with over a quarter of Ohioans in the program. Though, given the increase in annual federal deficits and the national debt, he wants to claim the mantle of fiscal prudence while he runs for the presidency a third time, Governor Kasich conveniently ignores the reality that Medicaid expansion is funded by deficit spending thereby adding to America's national debt every year.

Specifically, in 2000, Medicaid spending totaled \$206.2 billion. In 2014, when the Patient Protection and Affordable Care Act allowed governors to expand Medicaid to citizens at 138 percent of the federal poverty rate, Medicaid spending hit \$494.7 billion. By 2018, Medicaid spending reached nearly \$630 billion. In just eight years, it is estimated that Medicaid spending will surpass \$1 trillion per year. Without a doubt, Governor Kasich's Medicaid expansion, along with the other governors that joined him, will result in the doubling of Medicaid spending is just twelve years. In 2026, Medicaid spending alone will equal nearly the entire estimated federal deficit of \$1.3 trillion.

As Medicaid swallows half the state budget, it

RANKING THE STATES IN THREE KEY INDICATORS

Names of Republican governors elected in 2010 are in parentheses.

U.S. Rank	% Change Population, 2011-2018	% Change Per Capita State Spending, 2011-2017	% Change Private Sector Job Growth, 2011-2018	Overall Ranking
1	Utah, 12.3%	Alaska, -31.7%	Utah, 31.2%	Utah
2	Texas, 11.9%	Wyo., -29.2% (Mead)	Nev., 27.3% (Sandoval)	Texas
3	Nev., 11.9% (Sandoval)	W. Va., -18.0%	Fla., 26.8% (Scott)	Fla. (Scott)
4	Fla., 11.6% (Scott)	N.C., -11.4%	Idaho, 25.1%	Idaho
5	Colo., 11.2%	La., -10.7%	Texas, 24.9%	Colo.
6 7 8 9 10	N.D., 10.9% Ariz., 10.8% Idaho, 10.8% Wash., 10.5% S.C., 8.8% (Haley)	Miss., -8.7% Maine, -0.8% (LePage) Mass., 0.4% Utah, 1.7% S.C., 2.9% (Haley)	Colo., 24.7% Ore., 24.3% Ariz., 24.2% Wash., 23.9% Ga., 22.9% (Deal)	N.C. S.C. (Haley) Ore. Tenn. (Haslam) Mass.
11 12 13 14 15	Ore., 8.2% N.C., 7.5% Ga., 7.3% (Deal) S.D., 7.1% (Daugaard) Del., 6.6%	S.D., 3.0% (Daugaard) Tenn., 4.0% (Haslam) Idaho, 4.3% Kan., 4.5% (Brownback) Okla., 5.0% (Fallin)	Cal, 22.5% (Deal) Calif., 22.6% S.C., 20.5% (Haley) Tenn., 20.5% (Haslam) N.C., 19.8% Mich., 16.7% (Snyder)	Ga. (Deal) Mont. Nev. (Sandoval) Wash. S.D. (Daugaard)
16 17 18 19 20	Mont., 6.5% Tenn., 5.8% Va., 5.2% Calif., 5.1% Minn., 5.0%	Texas, 5.6% (Scott) Fla., 6.2% (Scott) Mont., 6.9% Colo., 7.8% Wis., 8.0% (Walker)	Hawaii, 16.1% N.D., 15.9% N.Y., 15.5% Mass., 15.2% Mont., 14.9%	Calif. Ariz. N.D. N.H. Minn.
21	Neb., 4.8%	N.H., 8.6%	N.H., 13.5%	Va. Okla. (Fallin) Mich. (Snyder) Del. Alaska
22	Mass., 4.4%	Mo., 8.8%	Minn., 13.4%	
23	Okla., 4.1% (Fallin)	Mich., 10.9% (Snyder)	Ind., 13.4%	
24	Md., 3.5%	Ore., 11.8%	Ohio, 13.1% (Kasich)	
25	Hawaii, 3.0%	Ohio, 12.0% (Kasich)	Del., 12.3%	
26 27 28 29 30	lowa, 2.9% (Branstad) N.H., 2.8% Ind., 2.7% Ark, 2.5% Ky., 2.3%	R.I., 12.5% Va., 13.7% Minn., 14.6% Vt., 14.8% Ga., 15.5% (Deal)	Va., 12.3% N.J., 12.1% Mo., 11.9% Ky., 11.8% R.I., 11.5%	Mo. La. Wyo. (Mead) Ind. Ohio (Kasich)
31	Alaska, 2.1% Mo., 1.9% Wis., 1.9% (Walker) Ala., 1.9% (Bentley) Wyo., 1.9% (Mead)	Calif., 15.7%	S.D., 11.3% (Daugaard)	Wis. (Walker)
32		Pa., 15.8%	Ala., 11.2% (Bentley)	Hawaii
33		Neb., 16.1%	Md., 10.9%	Neb.
34		N.Y., 17.7%	Wis., 10.7% (Walker)	Miss.
35		Ind., 18.4%	Okla., 10.5% (Fallin)	Maine (LePage)
36	La., 1.9%	Ark, 20.2% Del., 20.3% Wash., 22.1% lowa, 22.6% (Branstad) Conn., 22.7%	N.M., 10.4% (Martinez)	Kan. (Brownback)
37	Kan., 1.5% (Brownback)		Neb., 10.3%	N.Y.
38	Ohio, 1.3% (Kasich)		III., 10.0%	Md.
39	Mich., 1.2%		Ark, 9.7%	R.I.
40	N.J., 0.9%		Miss., 9.4%	W. Va.
41	Maine, 0.8% (LePage)	N.D., 22.8%	Pa., 9.4%	Ark
42	N.M., 0.7% (Martinez)	Md., 24.0%	lowa, 8.9% (Branstad)	Ky.
43	Pa., 0.5%	Ala., 24.8% (Bentley)	La., 8.8%	Iowa (Branstad)
44	R.I., 0.4%	N.J., 24.9%	Kan., 8.7% (Brownback)	Ala. (Bentley)
45	Miss., 0.3%	N.M., 26.1% (Martinez)	Maine, 7.6% (LePage)	N.J.
46	N.Y., 0.2%	Ky., 26.5%	Conn., 7.3%	Pa.
47	Vt., -0.1%	Hawaii, 26.6%	Vt., 4.9%	N.M. (Martinez)
48	Conn., -0.4%	Ariz., 37.2%	Wyo., 2.9% (Mead)	Vt.
49	III., -1.0%	Ill., 39.4%	Alaska, 1.9%	Conn.
50	W. Va., -2.7%	Nev., 49.3% (Sandoval)	W. Va., 0.3%	III.

SOURCES: U.S. CENSUS BUREAU, NATIONAL ASSOCIATION OF STATE BUDGET OFFICERS, AND BUREAU OF LABOR STATISTICS.

crowds out spending on other priorities such as education and transportation. In those two areas, after eight years, Ohio's education funding system remains broken and Ohio's educational ranking fell from 5th in the nation in 2010 to 22nd in 2018. On transportation, while Governor Kasich's monetization of the Ohio Turnpike brought in much-needed funds for transportation projects, those funds are gone and he didn't do anything else to solve Ohio's systemic surface transportation funding problems.

In addition, the fact that Ohio's three major airports aren't even in the top forty for passenger traffic despite Ohio's position as the 7th largest state makes it a very hard place to do business. Ohio is desperately in need of a major air transportation transformation along the lines of what Colorado did in the mid-1990s by building Denver International Airport. Ohio loses businesses because of its weak airports and that weakness played a role in Ohio not being selected for Amazon's second headquarter (and many other major corporate relocations).

Thus, at the same time his Medicaid expansion will

require more funding, especially when the next cyclical recession occurs resulting in job losses and more Medicaid expansion enrollees, Ohio will need more funding for other vital programs. During Governor Kasich's first six years, state spending went up nearly 29 percent, or 4.8 percent per year on average. When a decline in tax revenues would have left a \$1 billion deficit because of excessive spending over his first six years, Governor Kasich and the Ohio General Assembly were forced to ramp down state spending. Given the previous six years of spending growth at a pace two times greater than inflation, he has no evidence to cite that spending would have been reduced had a \$1 billion deficit not occurred.

Again, like balancing the budget, cutting spending because you have to is much different than cutting spending because it is the right thing to do. The former shows forced compliance, the latter shows core conviction. By spending greater than inflation over his eight years and tying the hands of future governors with his costly Medicaid expansion, Governor Kasich has placed Ohio's fiscal future in grave doubt.

Conclusion

John Kasich serves as a timely reminder that it really is better to be lucky than good. Had he been good, given the luck of serving during an expansion, he would have placed far higher in the ranking of governors elected in 2010. Instead, he placed in the bottom half among Republican governors elected that year.

For Ohio's sake, we must hope the Governor DeWine will want to do better than that by implementing the policies Governor Kasich lacked the courage or foresight to enact and defend. These policies are:

- Freeze or cut state spending to keep spending well below tax revenues
- Analyze every state program for cuts or elimination to make state government more efficient and effective
- Repeal the Medicaid expansion to gain control over state spending again
- Reduce the number of taxing jurisdictions to lighten the burden on Ohioans and their businesses

- Eliminate public sector collective bargaining for all non-public safety workers and institute real government pension reform, and
- Enact a private sector right-towork law to get Ohio competitive with its neighboring states.

Sadly, enacting some of these policies will only bring Ohio up-to-speed with its competitor states. Without enacting these policies, Ohio most certainly will continue to be a laggard, not a leader among the states. For nearly thirty years, Ohio's governors have nibbled on the margins and cut taxes without controlling spending. Not surprisingly, Ohio's government grew in size, spending, and its burden on businesses and individuals, as Ohio's private sector increased at an anemic pace and its population stagnated.

The reality is Governor Kasich fell far short of his own hype. Hopefully, Governor DeWine can and will do better.