

Oklahoma Ethics Commission Rule Amendment 2025-01
Modification: Increasing cash contribution limit from \$50 to \$200

1 **AMENDATORY Ethics Rule 2.19 Cash Contributions is amended to read as follows:**

2 No contribution of more than ~~Fifty Dollars (\$50.00)~~ **Two Hundred Dollars (\$200.00)** in cash
3 in the aggregate may be made to or accepted by a political party committee, a political
4 action committee or a candidate committee.

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Oklahoma Ethics Commission Rule Amendment 2025-02 – **Option 1**

Modification: Adding provision for committees with funds remaining at the time of dissolution for exploratory activities and extending time limit to 6 months.

AMENDATORY Ethics Rule 2.48 Candidate Committee Surplus Funds is amended to read as follows:

Surplus funds of a candidate committee are those funds not otherwise obligated following the election at which the office for which the candidate committee was formed has been determined which, in the candidate's discretion, are not required to be used for campaign expenses or officeholder expenses. Such surplus funds may be:

(A) Retained in any amount for use in a future campaign for the next succeeding term for the same office;

(B) Retained for a future campaign for a different state elective office, excluding a judicial office;

(C) Donated to a charitable organization as described in Section 501(c) (3) of Title 26 of the United States Code as it currently exists or as it may be amended;

(D) Returned to any contributor, as long as the amount returned does not exceed the contributor's aggregate contribution during the immediately preceding primary, runoff primary and general elections;

(E) Contributed to a political party committee in any amount not to exceed Twenty-five Thousand Dollars (\$25,000.00) in the aggregate;

(F) Used to purchase item(s) for donation to a charitable organization as described in Section 501(c)(3) of Title 26 of the United States Code as it currently exists or as it may be amended; provided:

1) the donated item(s) are sold by the charitable organization for fundraising purposes;

2) the purchase of the item(s) for donation is reported on a Contributions and Expenditures Report which includes a description and cost of the item(s) purchased;

3) the donation of the item(s) is reported on a Contributions and Expenditures Report as an in-kind expenditure to the charitable organization which includes a description and the value of the item(s) donated; and

4) the donated item(s) may not be purchased or used by the candidate whose committee is donating the item, any other candidate, a committee, or officer, board member or employee of the charitable organization; ~~or~~

(G) Donated in accordance with the provisions of Title 60 O.S. § 381, et seq., to the State of Oklahoma, or, to any county, city, town or school district within the State of Oklahoma; ~~or~~

Oklahoma Ethics Commission Rule Amendment 2025-02 – Option 1

Modification: Adding provision for committees with funds remaining at the time of dissolution for exploratory activities and extending time limit to 6 months.

(H) Retained by the Candidate for Exploratory Activities in accordance with Rule 2.78.

Any surplus funds remaining in the candidate committee's possession within ~~ninety (90)~~ days six (6) months after the expiration of the term to which the candidate was elected or, for candidates who were not elected, within ~~ninety (90) days~~ six (6) months after the second year following the general election, shall be deposited in the general revenue fund of the state.

Oklahoma Ethics Commission Rule Amendment 2025-02 – **Option 2**

Modification: Adding provision for committees with funds remaining at the time of dissolution for exploratory activities and extending time limit to 1 year.

AMENDATORY Ethics Rule 2.48 Candidate Committee Surplus Funds is amended to read as follows:

Surplus funds of a candidate committee are those funds not otherwise obligated following the election at which the office for which the candidate committee was formed has been determined which, in the candidate's discretion, are not required to be used for campaign expenses or officeholder expenses. Such surplus funds may be:

(A) Retained in any amount for use in a future campaign for the next succeeding term for the same office;

(B) Retained for a future campaign for a different state elective office, excluding a judicial office;

(C) Donated to a charitable organization as described in Section 501(c) (3) of Title 26 of the United States Code as it currently exists or as it may be amended;

(D) Returned to any contributor, as long as the amount returned does not exceed the contributor's aggregate contribution during the immediately preceding primary, runoff primary and general elections;

(E) Contributed to a political party committee in any amount not to exceed Twenty-five Thousand Dollars (\$25,000.00) in the aggregate;

(F) Used to purchase item(s) for donation to a charitable organization as described in Section 501(c)(3) of Title 26 of the United States Code as it currently exists or as it may be amended; provided:

1) the donated item(s) are sold by the charitable organization for fundraising purposes;

2) the purchase of the item(s) for donation is reported on a Contributions and Expenditures Report which includes a description and cost of the item(s) purchased;

3) the donation of the item(s) is reported on a Contributions and Expenditures Report as an in-kind expenditure to the charitable organization which includes a description and the value of the item(s) donated; and

4) the donated item(s) may not be purchased or used by the candidate whose committee is donating the item, any other candidate, a committee, or officer, board member or employee of the charitable organization; ~~or~~

(G) Donated in accordance with the provisions of Title 60 O.S. § 381, et seq., to the State of Oklahoma, or, to any county, city, town or school district within the State of Oklahoma; ~~or~~

Oklahoma Ethics Commission Rule Amendment 2025-02 – Option 2

Modification: Adding provision for committees with funds remaining at the time of dissolution for exploratory activities and extending time limit to 1 year.

(H) Retained by the Candidate for Exploratory Activities in accordance with Rule 2.78.

Any surplus funds remaining in the candidate committee's possession within ~~ninety (90)~~ **days one (1) year** after the expiration of the term to which the candidate was elected or, for candidates who were not elected, within ~~ninety (90) days~~ **one (1) year** after the second year following the general election, shall be deposited in the general revenue fund of the state.

Modification: Updating definition of a PAC to include any one person or more than one individual.

AMENDATORY Ethics Rule 2.79 Political Action Committee Definition is amended to read as follows:

A political action committee is (a) any group of two or more ~~persons~~ individuals; or (b) any person, other than an individual, including but not limited to a committee, association, organization or any other entity, whether one or more, and whether or not incorporated; that receives contributions or makes expenditures for any of the following purposes: (1) Making contributions to candidates or candidate committees; (2) making contributions to other political action committees; (3) making independent expenditures; (4) making electioneering communications or (5) advocating the approval or defeat of a state question. Unless they choose to be considered as such, family members, as defined by these Rules, or members of the same household shall not be considered a political action committee.

Oklahoma Ethics Commission Rule Amendment 2025-04 – **Option 1**

Modification: Adding provision for committees with funds remaining at the time of dissolution and extending time for dissolution to 6 months.

AMENDATORY Ethics Rule 2.116 Dissolution of Candidate Committee is amended to read as follows:

A candidate committee may dissolve at any time by filing a Final Report of Contributions and Expenditures that shows no funds remaining in the committee. A candidate committee **without funds remaining in its campaign depository** shall dissolve **by the mandatory dissolution date, being** no later than two (2) years after the general election for an office with a two-year term, no later than four (4) years after the general election for an office with a four-year term, and no later than six (6) years after the general election for an office with a six-year term, if not required to dissolve sooner by law or these Rules.

A candidate committee with funds remaining in its campaign depository on the specified mandatory dissolution date set forth above, may no longer (1) receive contributions, (2) contribute to other candidate committees, (3) make campaign expenditures, or (4) make operating expenditures.

For no longer than six (6) months following the mandatory dissolution date as set forth above, a candidate committee with funds remaining in its campaign depository on the specified mandatory dissolution date, may (1) make expenditures for remaining officeholder expenses for elected officers, and (2) distribute any surplus funds as provided for in Rule 2.48.

Oklahoma Ethics Commission Rule Amendment 2025-04 – **Option 2**

Modification: Adding provision for committees with funds remaining at the time of dissolution and extending time for dissolution to 1 year.

AMENDATORY Ethics Rule 2.116 Dissolution of Candidate Committee is amended to read as follows:

A candidate committee may dissolve at any time by filing a Final Report of Contributions and Expenditures that shows no funds remaining in the committee. A candidate committee **without funds remaining in its campaign depository** shall dissolve **by the mandatory dissolution date, being** no later than two (2) years after the general election for an office with a two-year term, no later than four (4) years after the general election for an office with a four-year term, and no later than six (6) years after the general election for an office with a six-year term, if not required to dissolve sooner by law or these Rules.

A candidate committee with funds remaining in its campaign depository on the specified mandatory dissolution date set forth above, may no longer (1) receive contributions, (2) contribute to other candidate committees, (3) make campaign expenditures, or (4) make operating expenditures.

For no longer than one (1) year following the mandatory dissolution date as set forth above, a candidate committee with funds remaining in its campaign depository on the specified mandatory dissolution date, may (1) make expenditures for remaining officeholder expenses for elected officers, and (2) distribute any surplus funds as provided for in Rule 2.48.

Oklahoma Ethics Commission Rule Amendment 2025-05

Modification: Adding definitions for “traditional business expense” and “de minimis amounts.”

1 **AMENDATORY Ethics Rule 5.2 Definitions is amended to read as follows:**

2 As used in Rule 5:

3 1. “Agency” means any entity in the executive branch of state government created by the
4 Constitution or laws of the State of Oklahoma and supported in whole or in part by state
5 funds or entrusted with the expending of state funds or administering of state property or
6 otherwise exercising the sovereign power of the State of Oklahoma, including but not
7 limited to all such offices, departments, institutions, boards, bureaus, commissions,
8 agencies, authorities and instrumentalities of the State of Oklahoma. “Agency” shall not
9 mean any city, county, rural electric cooperative or tribal housing authority created under
10 the Oklahoma Housing Authorities Act nor any state entity that performs only advisory
11 functions and that cannot independently exercise the sovereign power of the State of
12 Oklahoma;

13 2. “Commission” shall mean the Oklahoma Ethics Commission;

14 3. “De minimis amounts” are expenditures of \$20.00 or less expended for Traditional
15 Business Expenses. If the yearly cumulative amount spent on the Governor, a legislator or
16 any employee of the Governor or the Legislature is greater than the de minimis amount, it
17 shall be reported and aggregated against the Traditional Business Expenses limit provided
18 to an individual recipient.

19 ~~3.4.~~ “Executive lobbying” means any oral or written communication with a state officer or
20 employee of an agency, excluding the Governor or a member of the Legislature or with an
21 employee of the Governor or the Legislature, on behalf of a lobbyist principal with regard to
22 the passage, defeat, formulation, modification, interpretation, amendment, adoption,
23 approval or veto of any legislation, rule, rate, regulation, executive order or any other
24 program, policy or position of state government. However, “executive lobbying” shall not
25 mean testimony given at, or submitted in writing to, a public hearing of the agency, nor a
26 speech, article, publication or other material that is widely distributed, published in
27 newspapers, magazines or similar publications or broadcast on radio or television;

28 ~~4.~~ 5. “Executive lobbyist” means any individual who is employed or retained by another for
29 financial or other compensation to perform services that include executive lobbying, other
30 than an individual whose lobbying activities are only incidental to, and are not a significant
31 part of, the services provided by such individual to the client, except the following
32 individuals shall not be considered lobbyists:

Oklahoma Ethics Commission Rule Amendment 2025-05

Modification: Adding definitions for “traditional business expense” and “de minimis amounts.”

a. an individual appearing before a state officer or employee of an agency who receives no compensation for his or her appearance other than reimbursement from the state for expenses and who engages in no further lobbying;

b. a federal official acting in his or her official capacity;

c. any person exercising his or her constitutional right to petition the government who receives no compensation or anything of value for lobbying;

~~5.6.~~ “Family member” shall include spouse, children (including stepchildren), mother, father, sister or brother;

~~6.7.~~ “Legislative liaison” means any state officer or employee whose duties in fact include legislative lobbying, regardless of the state officer or employee’s title and regardless of whether or not legislative lobbying is included within the state officer or state employee’s job description other than an individual whose lobbying activities are only incidental to, and are not a significant part of, the services provided by such individual to the agency. Each agency shall have at least one (1) legislative liaison, unless all officers and employees of the agency provide information to the Governor or a legislator only at the request of the Governor or a legislator or an employee of the Governor or the Legislature or as required by law, and provided further that no officer or employee of the agency has requested legislation, other than an appropriation for the agency, or other legislative action, or unless the agency has a contract with a legislative lobbyist to provide legislative lobbying services;

~~7.8.~~ “Legislative lobbying” means any oral or written communication with the Governor or with a member of the Legislature or with an employee of the Governor or the Legislature on behalf of a lobbyist principal with regard to the passage, defeat, formulation, modification, interpretation, amendment, adoption, approval or veto of any legislation, rule, regulation, executive order or any other program, policy or position of state government. As used in this Rule, “employee of the Governor or the Legislature” includes any state officer or employee who advises the Governor, a legislator or the Legislature on legislation other than legislation that affects only his or her agency. However, “legislative lobbying” shall not mean testimony given before, or submitted in writing to, a committee or subcommittee of the Legislature, nor a speech, article, publication or other material that is widely distributed, published in newspapers, magazines or similar publications or broadcast on radio or television;

~~8.9.~~ “Legislative lobbyist” means any individual who is employed or retained by another for financial or other compensation to perform services that include legislative lobbying, other than an individual whose lobbying activities are only incidental to, and are not a significant

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Modification: Adding definitions for “traditional business expense” and “de minimis amounts.”

part of, the services provided by such individual to the client, except the following individuals shall not be considered lobbyists:

a. an individual appearing before the Governor or a meeting of a legislative body who receives no compensation for his or her appearance other than reimbursement from the state for expenses and who engages in no further lobbying;

b. a federal official acting in his or her official capacity;

c. any person exercising his or her constitutional right to petition the government who receives no compensation or anything of value for lobbying;

~~9.10.~~ “Lobbyist principal” means any person or entity, including an agency, who employs or retains another person for financial or other compensation to conduct executive or legislative lobbying activities on behalf of the lobbyist principal; provided, however, it shall not mean any individual members, partners, officers or shareholders of an agency, a corporation, association, firm, joint venture, joint stock company, syndicate, business trust, estate, trust, company, partnership, limited partnership, organization, committee or club, or a group of persons who are voluntarily acting in concert.

11. “Traditional Business Expenses” means expenditures for meals, any individual or team sports, athletic contests or events, conferences, lectures, performances, seminars, or similar events held within the boundaries of the State of Oklahoma.

**AMENDATORY Ethics Rule 5.3 Annual Registration for Legislative Liaison and
Legislative Lobbyist is amended to read as follows:**

Each legislative liaison or legislative lobbyist shall be required to register with the Ethics Commission each year that the legislative liaison or legislative lobbyist engages in lobbying. Each legislative liaison or legislative lobbyist shall register or renew his or her registration with the Commission and pay any applicable fees no earlier than December 1 of each year nor later than January 15 of the following year for the calendar year beginning January 1 or within five (5) days after engaging in lobbying on behalf of one or more lobbyist principals. Registration by legislative liaisons or legislative lobbyists shall be filed electronically, unless otherwise ordered by the Commission or the Executive Director of the Commission. Information on the registration shall include the legislative liaison or legislative lobbyist's name, business address, including electronic mail address and business telephone numbers, the name and address of each lobbyist principal by whom the liaison or lobbyist is employed or retained **including disclosure of whether each lobbyist principal is a government, political party, individual or entity organized in or with its principal place of business located in a country of particular concern as identified by the US Department of State**, and the date of the registration.

AMENDATORY Ethics Rule 5.5 Annual Registration and Termination of Registration for Executive Lobbyist is amended to read as follows:

Each executive lobbyist shall be required to register with the Ethics Commission. An executive lobbyist may register and pay any applicable fees no earlier than December 1 of each year nor later than January 15 of the following year for the calendar year beginning January 1 or within five (5) days after engaging in lobbying on behalf of one or more lobbyist principals. Registration by executive lobbyists shall be filed electronically, unless otherwise ordered by the Commission or the Executive Director of the Commission. Information on the registration shall include the executive lobbyist's name, business address, including electronic mail address and business telephone numbers, the name and address of each lobbyist principal by whom the lobbyist is employed or retained including disclosure of whether each lobbyist principal is a government, political party, individual or entity organized in or with its principal place of business located in a country of particular concern as identified by the US Department of State, the agency or agencies before which the lobbyist is lobbying and the date of the registration. The executive lobbyist may terminate his or her registration at any time by electronically filing a notice of termination on a form provided by the Commission and filing a final Executive Lobbyist Report. An executive lobbyist whose registration has not been terminated by November 30 of any year shall be required to register as provided in this subsection for the calendar year beginning the following January 1. Until terminated, the registration shall remain effective, and the executive lobbyist shall be required to file Executive Lobbyist Reports as provided by these Rules.

AMENDATORY Ethics Rule 5.6 Prohibition on Things of Value Provided to or Accepted by Governor, Legislative Officers and Employees is amended to read as follows:

Except as provided in these Rules, a legislative liaison, a legislative lobbyist or a lobbyist principal by whom the legislative liaison or legislative lobbyist is employed or retained shall provide no gift to the Governor, a legislator or any employee of the Governor or the Legislature.

The Governor, a legislator or any employee of the Governor or the Legislature shall not knowingly accept anything of value from a legislative liaison, a legislative lobbyist or a lobbyist principal by whom the legislative liaison or legislative lobbyist is employed or retained except **for expenditures expended as traditional business expenses as defined in Rule 5.2** or as permitted by these Rules. Except as provided in these Rules, an executive lobbyist or a lobbyist principal by whom the executive lobbyist is employed or retained shall provide nothing of value to any officer or employee of an agency that is the subject of the executive lobbyist's lobbying activities. No officer or employee of an agency that is subject to an executive lobbyist's lobbying activities shall knowingly accept anything of value from an executive lobbyist or a lobbyist principal by whom an executive lobbyist is employed except as permitted by these Rules. In no event shall a legislative liaison, a legislative lobbyist, an executive lobbyist or a lobbyist principal indirectly provide anything of value to any state officer or employee by providing a thing of value to a family member of the state officer or employee, other than as permitted by these Rules. In no event shall the costs of a thing of value provided by a legislative liaison or legislative lobbyist to the Governor, a legislator or any employee of the Governor or the Legislature permitted by these Rules be divided or shared with other legislative liaisons or legislative lobbyists in filing a report required by these Rules unless otherwise provided by these Rules. Agencies may provide two (2) tickets or admissions to any conference, seminar, lecture or similar event held within the boundaries of the State of Oklahoma and sponsored in whole or in part by the agency to the Governor, any legislator or any employee of the Governor or Legislature, provided the tickets or admissions are used by the recipient and a family member of the recipient.

AMENDATORY Ethics Rule ~~5.8 Gift Limits for Legislative Liaison or Legislative Lobbyist~~
is repealed in its entirety:

~~A legislative liaison or a legislative lobbyist may make a gift to the Governor or any legislator or any employee of the Governor or the Legislature in recognition of infrequently occurring occasions of personal significance. The gift shall be given and received contemporaneously with the occasion or at times when such gifts are traditionally given. Such gifts may be made to a family member of the Governor or any legislator or any employee of the Governor or the Legislature, provided such family member is a party to a marriage, serious illness, birth or adoption of a child or retirement. Such gifts to any individual recipient may not exceed Two Hundred Dollars (\$200.00) in the aggregate in any calendar year from any legislative liaison or legislative lobbyist. Any such gifts shall be reported to the Commission and aggregated with meals, and the aggregate total of meals and other gifts provided to an individual recipient by a legislative liaison or legislative lobbyist may not exceed Seven Hundred and Fifty Dollars (\$750.00).~~

AMENDATORY Ethics Rule 5.16 Food and Beverage Provided by a Lobbyist Principal to either House of the Legislature, a Legislative Committee or Subcommittee is amended to read as follows:

A lobbyist principal that employs or retains a legislative liaison or legislative lobbyist may provide food and beverage for any event or legislative session held within the Capitol building to which all members of either House of the Legislature, a committee or subcommittee of either House of the Legislature identified in the Rules or Journal of the respective House are invited and which is attended by a majority of members of the House of the Legislature, committee or subcommittee no more than once per calendar year for any such House of the Legislature, committee or subcommittee, provided the event is reported as provided by these Rules. More than one lobbyist principal may provide food and beverage for such an event, but no lobbyist principal shall participate in more than one such event per calendar year for any committee or subcommittee. The reporting provision of this section shall not include legislators who are not members of the committee or subcommittee, nor shall it include legislative staff members who do not officially or regularly provide staff services for the committee or subcommittee.