

Who is required to report as a local or education lobbyist?

If you get paid to communicate with an education official or a local official (see section below) to influence a local action or education action, you are likely subject to reporting requirements under Utah Code 36-11a.

Some common local actions and education actions include:

- Ordinances and draft policies, resolutions, or rules
- Nominations or appointments
- Administration actions taken by a vote
- Purchasing or contracting decisions
- Determining rates or fees
- Adjudicative proceedings or decisions

Please see 36-11a-102(5) & (15) and for an inclusive list of these actions.

Who are local officials or education officials?

Who are education officials and local officials? As defined in 36-11a-102(6) & (17), these are:

"Education official":

(a) a member of a board of education;
(b) an individual appointed to or employed in a position under a board of education if that individual:

- occupies a policymaking position or makes purchasing or contracting decisions;
- drafts resolutions or policies or drafts or makes rules;
- determines rates or fees; or
- makes adjudicative decisions; or

(c) an immediate family member of an individual described in (a) or (b).

"Local official":

(a) an elected member of a local government;
(b) an individual appointed to or employed in a position in a local government if that individual:

- occupies a policymaking position or makes purchasing or contracting decisions;
- drafts ordinances or resolutions or drafts or makes rules;
- determines rates or fees; or
- makes adjudicative decisions; or

(c) an immediate family member of an individual described in (a) or (b).

What is an expenditure?

An expenditure is something given to benefit an official. Common expenditures include purchasing meals or paying for an official's travel to or lodging at a meeting. Please see 36-11a-102(8) for the full definition.

What am I required to report?

1. Name and type of local official or education official benefitted by the expenditure.
2. Date of the expenditure.
3. Specific purpose of the expenditure.
Include a description of each local action or education action (e.g., ordinance number and title).
4. Location of the expenditure (e.g., LMNO Restaurant).
Indicate if the expenditure was to pay for travel or lodging for the local official or education official, and if it was, you must also include each travel destination and each lodging location.
5. Expenditure amount.

When do I file reports?

If you make expenditures between January 1 – September 30, file a quarterly report on lobbyist.utah.gov.

All lobbyists must file the Quarter 4 report by January 10, *regardless of whether or not expenditures were made.*

April 10

The Quarter 1 report includes expenditures made between January 1–March 31.

July 10

The Quarter 2 report includes expenditures made between April 1–June 30.

October 10

The Quarter 3 report includes expenditures made between July 1–September 30.

January 10

The Quarter 4 report includes expenditures made between October 1–December 31.

All lobbyists must file the Quarter 4 report by January 10, *regardless of whether or not expenditures were made.*

How do I file expenditure reports?

1. Visit lobbyist.utah.gov and click [New User](#) to create a username.
 2. Call **801-538-1041** to open your lobbyist account.
 3. Once you're logged on to lobbyist.utah.gov, click Financial Ledger.
 4. Click Add in the Expenditures (-) column.
 5. Enter the information you're required to report, save it, and file the report.
- Every lobbyist is required to file at least the Quarter 4 report.

Questions?

Utah Lieutenant Governor's Office

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Updated May 2019