

1 **Joint Rules Resolution - Requests for Appropriation**

2026 GENERAL SESSION

STATE OF UTAH

Chief Sponsor: Troy Shelley

Senate Sponsor:

LONG TITLE**General Description:**

This resolution modifies rules related to requests for appropriation.

Highlighted Provisions:

This resolution:

- ▶ directs the Executive Appropriations Committee to set aside a specified portion of available revenue to fund district requests for appropriation;
- ▶ allows each legislator a set amount of the available funding to fund, through a district request for appropriation, a project or program within the legislator's district;
- ▶ provides requirements for a district request for appropriation;
- ▶ directs the assigned joint appropriations subcommittee to review each district request for appropriation for compliance with the applicable requirements; and
- ▶ requires the Executive Appropriations Committee to include in a final appropriations bill each district request for appropriation approved by a joint appropriations subcommittee.

Money Appropriated in this Bill:

None

Other Special Clauses:

This resolution provides a special effective date.

Legislative Rules Affected:22 **AMENDS:**

JR3-2-101

JR3-2-402

JR3-2-701

JR3-2-702

28 *Be it resolved by the Legislature of the state of Utah:*

29 Section 1. **JR3-2-101** is amended to read:

30 **JR3-2-101 . Definitions.**

31 As used in this chapter:

32 (1) "Accountable process budget" means a budget that is created by starting from zero and
33 adding line items and programs recommended through an accountable budget process.

34 (2) "Accountable budget process" means a review of a line item or program in a simple
35 base budget to determine whether or the extent to which to recommend the line item or
36 program be included in a budget for the upcoming fiscal year.

37 (3) "Base budget" means:

38 (a) an accountable process budget; or
39 (b) for a line item or program that was not the subject of an accountable process budget
40 analysis during the immediately preceding interim, a simple base budget.

41 (4) "Chair" means:

42 (a) the chair of an appropriations subcommittee or the Executive Appropriations
43 Committee; or
44 (b) a member of a joint appropriations subcommittee or the Executive Appropriations
45 Committee member who is authorized to act as chair under JR3-2-303.

46 (5) "Committee" means a joint appropriations subcommittee or the Executive
47 Appropriations Committee.

48 (6) "District request for appropriation" means a request for appropriation that requests a
49 one-time appropriation of legislator district funds to support a project or program that is:
50 (a) wholly or partially within the legislator's district; and
51 (b) serves a statewide public purpose.

52 [(6)] (7) "Fee agency" means the same as that term is defined in Utah Code Section
53 63J-1-504.

54 [(7)] (8) "Fee schedule" means the same as that term is defined in Utah Code Section
55 63J-1-504.

56 (9) "Individual allocation of legislator district funds" means:

57 (a) for a senator, an amount equal to 50% of the legislator district funds, divided by 29;
58 or
59 (b) for a representative, an amount equal to 50% of the legislator district funds, divided
60 by 75.

61 (10) "Legislator district funds" means the funds set aside for district requests for
62 appropriation under JR3-2-402.

63 [(8)] (11) "Majority vote" means a majority of a quorum as provided in JR3-2-404.

64 [(9)] (12) "Original motion" means a non-privileged motion that is accepted by the chair

65 when no other motion is pending.

66 [§10] (13) "Pending motion" refers to a motion starting when a chair accepts a motion and
67 ending when the motion is withdrawn or when the chair calls for a vote on the motion.

68 [§11] (14)(a) "Privileged motion" means a procedural motion to adjourn, set a time to
69 adjourn, recess, end debate, extend debate, or limit debate.

70 (b) "Privileged motions" are not substitute motions.

71 [§12] (15)(a) "Proposed budget item" means any funding item under consideration for
72 inclusion in an appropriations bill.

73 (b) "Proposed budget item" includes a request for appropriation.

74 [§13] (16) "Request for appropriation" means a legislator request to:

75 (a) obtain funding for a project or program that has not previously been funded;

76 (b) significantly expand funding for an existing project or program; or

77 (c) obtain separate funding for a project or program.

78 [§14] (17)(a) "Simple base budget" means amounts appropriated by the Legislature for
79 each line item for the current fiscal year that:

80 (i) are not designated as one-time in an appropriation, regardless of whether the
81 appropriation is covered by ongoing or one-time revenue sources; and

82 (ii) were not vetoed by the governor, unless the Legislature overrode the veto.

83 (b) "Simple base budget" includes:

84 (i) any changes to those amounts approved by the Executive Appropriations

85 Committee; and

86 (ii) amounts appropriated for debt service.

87 [§15] (18) "Substitute motion" means a non-privileged motion that is made when a
88 non-privileged motion is pending.

89 [§16] (19) "Under consideration" means the time starting when a chair opens a discussion
90 on a subject or an appropriations request that is listed on a committee agenda and ending
91 when the committee disposes of the subject or request, moves on to another item on the
92 agenda, or adjourns.

93 Section 2. **JR3-2-402** is amended to read:

94 **JR3-2-402 . Executive appropriations -- Duties -- Base budgets.**

95 (1)(a) The Executive Appropriations Committee shall meet no later than the third
96 Wednesday in December to:

97 (i) direct staff as to what revenue estimate to use in preparing budget
98 recommendations, to include a forecast for federal fund receipts;

99 (ii) consider treating above-trend revenue growth as one-time revenue for major tax
100 types and for federal funds;

101 (iii) hear a report on the historical, current, and anticipated status of the following:
102 (A) debt;
103 (B) long term liabilities;
104 (C) contingent liabilities;
105 (D) General Fund borrowing;
106 (E) reserves;
107 (F) fund balances;
108 (G) nonlapsing appropriation balances;
109 (H) cash funded infrastructure investment; and
110 (I) changes in federal funds paid to the state;

111 (iv) hear a report on:
112 (A) the next fiscal year base budget appropriation for Medicaid accountable care
113 organizations according to Utah Code Section 26B-3-203;
114 (B) an explanation of program funding needs;
115 (C) estimates of overall medical inflation in the state; and
116 (D) mandated program changes and their estimated cost impact on Medicaid
117 accountable care organizations;

118 (v) decide whether to set aside special allocations for the end of the session, including
119 allocations:
120 (A) to address any anticipated reduction in the amount of federal funds paid to the
121 state; and
122 (B) of one-time revenue to pay down debt and other liabilities;

123 (vi)(A) hear a report on construction inflation and the ongoing operation and
124 maintenance costs of any capital development project requested by an
125 institution under Utah Code Section 53B-2a-117 or 53B-22-204; and
126 (B) in response to the report described in Subsection (1)(a)(vi)(A), decide whether
127 to adjust the next fiscal year base budget or set aside special allocations for the
128 end of the session;

129 (vii) decide whether to set aside special allocations for legislation that will reduce
130 taxes, including legislation that will reduce one or more tax rates;

131 (viii) subject to Subsection (1)(c), unless waived by majority vote, if the amortization
132 rate as defined in Utah Code Section 49-11-102 for the new fiscal year is less than

133 the amortization rate for the preceding fiscal year, set aside an amount equal to the
134 value of the reduction in the amortization rate;

135 (ix) approve the appropriate amount for each subcommittee to use in preparing its
136 budget;

137 (x) subject to Subsection (1)(d), set aside for district requests for appropriation, an
138 amount equal to the lesser of:

139 (A) 1% of the difference between the ongoing General Fund and Income Tax
140 Fund revenue estimate adopted in accordance with Subsection (1)(a)(i) and the
141 ongoing General Fund and Income Tax Fund amount adopted as part of the
142 base budget described in Subsection (1)(a)(xii); and

143 (B) \$10,000,000;

144 [(x)] (xi) set a budget figure; and

145 [(xi)] (xii) adopt a base budget in accordance with Subsection (1)(b) and direct the
146 legislative fiscal analyst to prepare one or more appropriations acts appropriating
147 one or more base budgets for the next fiscal year.

148 (b) In a base budget adopted under Subsection (1)(a), the Executive Appropriations
149 Committee shall set appropriations from the General Fund, the Income Tax Fund,
150 and the Uniform School Fund as follows:

151 (i) if the next fiscal year ongoing revenue estimates set under Subsection (1)(a)(i) are
152 equal to or greater than the current fiscal year ongoing appropriations, the new
153 fiscal year base budget is not changed;

154 (ii) if the next fiscal year ongoing revenue estimates set under Subsection (1)(a)(i) are
155 less than the current fiscal year ongoing appropriations, the new fiscal year base
156 budget is reduced by the same percentage that projected next fiscal year ongoing
157 revenue estimates are lower than the total of current fiscal year ongoing
158 appropriations;

159 (iii) in making a reduction under Subsection (1)(b)(ii), appropriated debt service shall
160 not be reduced, and other ongoing appropriations shall be reduced, in an amount
161 sufficient to make the total ongoing appropriations, including the unadjusted debt
162 service, equal to the percentage calculated under Subsection (1)(b)(ii); and

163 (iv) the new fiscal year base budget shall include an appropriation to the Department
164 of Health and Human Services for Medicaid accountable care organizations in the
165 amount required by Utah Code Section 26B-3-203.

166 (c)(i) The Executive Appropriations Committee shall:

167 (A) comply with the set aside requirement described in Subsection (1)(a)(vii)
168 using money from the General Fund, Income Tax Fund, and Uniform School
169 Fund;
170 (B) accumulate money set aside under Subsection (1)(a)(vii) across fiscal years;
171 and
172 (C) when the total amount set aside under Subsection (1)(a)(vii), including any
173 amount to be set aside in the new fiscal year, equals or exceeds the cost of a
174 0.50% increase in benefited state employee salaries for the new fiscal year,
175 include in the base budget an increase in benefited state employee salaries
176 equal to the total set aside amount.

177 (ii) The Executive Appropriations Committee may waive or modify a requirement
178 described in Subsection (1)(c)(i) by majority vote.

179 (d) After receiving an updated revenue estimate, the Executive Appropriations
180 Committee shall use the updated revenue estimate to recalculate and adjust the
181 amount set aside under Subsection (1)(a)(x) for district requests for appropriation.

182 [(d)] (e) The chairs of each joint appropriations subcommittee are invited to attend the
183 meeting described in this Subsection (1).

184 (2) All proposed budget items shall be submitted to one of the subcommittees named in
185 JR3-2-302 for consideration and recommendation.

186 (3)(a) After receiving and reviewing subcommittee reports, the Executive
187 Appropriations Committee may refer the report back to a joint appropriations
188 subcommittee with any guidelines the Executive Appropriations Committee
189 considers necessary to assist the subcommittee in producing a balanced budget.

190 (b) The subcommittee shall meet to review the new guidelines and report the
191 adjustments to the chairs of the Executive Appropriations Committee as soon as
192 possible.

193 (4)(a) After receiving the reports, the Executive Appropriations Committee chairs will
194 report them to the Executive Appropriations Committee.

195 (b) The Executive Appropriations Committee shall:
196 (i) include all approved district requests for appropriation in one or more
197 appropriations bills;
198 [(i)] (ii) make any further adjustments necessary to balance the budget; and
199 [(ii)] (iii) complete all decisions necessary to draft the final appropriations bills no
200 later than the last Friday before the 45th day of the annual general session.

201 (5) No later than December 1 of each calendar year, the Executive Appropriations
202 Committee shall:

203 (a) review the budget for the Office of the Legislative Fiscal Analyst, the Office of
204 Legislative Research and General Counsel, the Office of the Legislative Auditor
205 General, and the Office of Legislative Services; and
206 (b) certify the Legislature's budget to the governor in accordance with Utah Code
207 Section 63J-1-201.

208 Section 3. **JR3-2-701** is amended to read:

209 **JR3-2-701 . Request for appropriation -- Contents -- Timing.**

210 (1)(a) A legislator intending to file a request for appropriation shall file the request for
211 appropriation with the Office of the Legislative Fiscal Analyst in accordance with
212 this rule.
213 (b) Except for an amendment to a proposed budget item described in JR3-2-703, a
214 committee may not adopt, recommend, or prioritize a request for appropriation that is
215 not filed or generated in accordance with this rule.
216 (c) A legislator may not file a request for appropriation if the request is intended to fund
217 the fiscal impact of legislation.
218 (d) The Office of the Legislative Fiscal Analyst shall automatically generate a request
219 for appropriation to fund the fiscal impact of legislation if:
220 (i) the legislation has an expenditure impact of \$1,000,000 or more from the General
221 Fund or the Income Tax Fund; and
222 (ii) the Office of the Legislative Fiscal Analyst knows the fiscal impact of the
223 legislation before the deadline described in Subsection (3)(a).
224 (2)(a) A legislator may file a request for appropriation beginning 60 days after the day
225 on which the Legislature adjourns its annual general session sine die.
226 (b) A legislator-elect may file a request for appropriation beginning on:
227 (i) the day after the day on which the election canvass is complete; or
228 (ii) if the legislator-elect's election results have not been finalized as of the canvass
229 date, the day after the day on which the election results for the legislator-elect's
230 race are final.
231 (c)(i) An incumbent legislator may not file a request for appropriation as of the date
232 that the legislator:
233 (A) fails to file to run for reelection;
234 (B) is ineligible to be included on the ballot for the election in which the legislator

would have sought an additional term; or

(C) fails to win reelection and the legislator's opponent is eligible to file a request for appropriation under Subsection (2)(b).

(ii) Subsection (2)(c)(i) does not apply to a request for appropriation for a general session that occurs while the legislator is in office.

(3)(a) Except as provided in Subsection (3)(b), a legislator may not file a request for appropriation with the Office of the Legislative Fiscal Analyst after noon on the 1st day of the annual general session.

(b) After the date established by this Subsection (3), a legislator may file a request for appropriation if:

(i) for a request by a House member, the representative makes a motion to file a request for appropriation and that motion is approved by a constitutional majority of the House:

(ii) for a request by a senator, the senator makes a motion to file a request for appropriation and that motion is approved by a constitutional majority vote of the Senate; or

(iii) a member of the Executive Appropriations Committee has presented the request at a public meeting of the Executive Appropriations Committee.

(4) A legislator who files a request for appropriation:

(a) is the chief sponsor;[–and]

(b) shall indicate whether the request for appropriation is a district request for appropriation; and

[~~(b)~~] (c) shall provide the following information related to the project or program that is the subject of the request for appropriation:

(i) the name and a description of the project or program;

(ii) the statewide purpose of the project or program;

(iii) if applicable, the legislator's designee who is knowledgeable about and

responsible for providing pertinent information while the Office of the Legislative Fiscal Analyst processes the request;

[iv) the state funding source from which the legislator proposes to fund the project or program;]

[**(v)**] **(iv)** the amount of the request[~~and whether the amount is to be appropriated one-time, ongoing, or a combination of one-time and ongoing~~];

[(vi)] (v) an itemized budget for the project or program;

269 [viii] (vi) the state agency that has jurisdiction over the project or program;
270 [viii] (vii) if the request is for pass through funding that a state agency will
271 distribute, the type of entity or organization the legislator intends to receive the
272 funding;
273 [ix] (viii) the scalability of the project or program;[and]
274 [x] (ix) one or more outcomes the legislator expects the project or program to
275 achieve[.]; and
276 (x) if the request for appropriation is not a district request for appropriation:
277 (A) the state funding source from which the legislator proposes to fund the project
278 or program; and
279 (B) whether the amount is to be appropriated one-time, ongoing, or a combination
280 of one-time and ongoing.

281 (5)(a) For a fiscal year for which legislator district funds are available, each legislator
282 may submit one or more district requests for appropriation.
283 (b) Subject to Subsection (5)(c), the total amount of a legislator's district requests for
284 appropriation may not exceed the legislator's individual allocation of legislator
285 district funds for the fiscal year.
286 (c) Two or more legislators may jointly submit a district request for appropriation if:
287 (i) each legislator's district shares at least one district boundary line with the district
288 of at least one other legislator who jointly submits the district request for
289 appropriation;
290 (ii) the legislators wish to combine some or all of the legislators' individual
291 allocations of legislator district funds to fund the same project or program; and
292 (iii) the project or program is wholly or partially within each of the legislators'
293 districts.

294 Section 4. **JR3-2-702** is amended to read:

295 **JR3-2-702 . Review and referral of requests for appropriation.**

296 (1)(a) The legislative fiscal analyst shall review each request for appropriation.
297 (b) If the request for appropriation requires that a statute be enacted, amended, or
298 repealed, the legislative fiscal analyst shall immediately transfer the request to the
299 Office of Legislative Research and General Counsel as a request for legislation.
300 (c) If the request for appropriation contains each item described in JR3-2-701(4) and
301 does not require that a statute be enacted, amended, or repealed, the legislative fiscal
302 analyst shall number, title, and refer the request for appropriation to:

303 (i) the House chair of the Executive Appropriations Committee, if the sponsor is a
304 House member; or

305 (ii) the Senate chair of the Executive Appropriations Committee, if the sponsor is a
306 Senate member.

307 (2) The House or Senate chair of the Executive Appropriations Committee shall refer the
308 request for appropriation to the joint appropriations subcommittee with oversight
309 responsibility or to the Executive Appropriations Committee.

310 (3) Each joint appropriations subcommittee that receives a request for appropriation shall:
311 (a) allow the sponsor to present and discuss the request for appropriation with the
312 subcommittee;

313 (b) discuss the request for appropriation; and

314 (c)(i) [do one of the following] if the request for appropriation is not a district request
315 for appropriation:

316 [(i)] (A) include all or part of the request for appropriation in the budget
317 recommendation made by the subcommittee or the Executive Appropriations
318 Committee;

319 [(ii)] (B) reject the request for appropriation; or

320 [(iii)] (C) recommend to the Executive Appropriations Committee that all or part
321 of the requested appropriation be placed on a funding prioritization list[.] ; or

322 (ii) if the request for appropriation is a district request for appropriation:

323 (A) determine whether the district request for appropriation satisfies the
324 requirements of JR3-2-701; and

325 (B) if the joint appropriations subcommittee determines that the district request for
326 appropriation satisfies the requirements of JR3-2-701, notify the Executive
327 Appropriations Committee that the district request for appropriation is
328 approved.

329 **Section 5. Effective Date.**

330 This resolution takes effect on July 1, 2026.