

Joint Rules Resolution - Legislative Expenditures Amendments

2026 GENERAL SESSION

STATE OF UTAH

Chief Sponsor: Ryan D. Wilcox

Senate Sponsor:

LONG TITLE**General Description:**

This joint rules resolution addresses legislative expenditures.

Highlighted Provisions:

This resolution:

- defines "legislative aide";
- requires the Executive Appropriations Committee to set aside an allocation each fiscal year for the Senate and House of Representatives for legislator administrative and staff expenses;
- authorizes the Executive Appropriations Committee to set aside an allocation each fiscal year for expenditures related to administering a legislative committee;
- establishes requirements for the disbursement, use, and tracking of allocations for legislator administrative and staff expenses; and
- makes technical and conforming changes.

Money Appropriated in this Bill:

None

Other Special Clauses:

This resolution provides a special effective date.

Legislative Rules Affected:

AMENDS:

JR3-2-402

JR5-1-102

ENACTS:

JR5-6-101

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

Section 1. **JR3-2-402** is amended to read:

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

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

- (i) direct staff as to what revenue estimate to use in preparing budget recommendations, to include a forecast for federal fund receipts;
- (ii) consider treating above-trend revenue growth as one-time revenue for major tax types and for federal funds;
- (iii) hear a report on the historical, current, and anticipated status of the following:
 - (A) debt;
 - (B) long term liabilities;
 - (C) contingent liabilities;
 - (D) General Fund borrowing;
 - (E) reserves;
 - (F) fund balances;
 - (G) nonlapsing appropriation balances;
 - (H) cash funded infrastructure investment; and
 - (I) changes in federal funds paid to the state;
- (iv) hear a report on:
 - (A) the next fiscal year base budget appropriation for Medicaid accountable care organizations according to Utah Code Section 26B-3-203;
 - (B) an explanation of program funding needs;
 - (C) estimates of overall medical inflation in the state; and
 - (D) mandated program changes and their estimated cost impact on Medicaid accountable care organizations;
- (v) decide whether to set aside special allocations for the end of the session, including allocations:
 - (A) to address any anticipated reduction in the amount of federal funds paid to the state; and
 - (B) of one-time revenue to pay down debt and other liabilities;
- (vi)(A) hear a report on construction inflation and the ongoing operation and maintenance costs of any capital development project requested by an institution under Utah Code Section [53B-2a-117] 53H-9-504 or [53B-22-204] 53H-9-605; and
- (B) in response to the report described in Subsection (1)(a)(vi)(A), decide whether to adjust the next fiscal year base budget or set aside special allocations for the

- 65 end of the session;
- 66 (vii) decide whether to set aside special allocations for legislation that will reduce
- 67 taxes, including legislation that will reduce one or more tax rates;
- 68 (viii) subject to Subsection (1)(c), unless waived by majority vote, if the amortization
- 69 rate as defined in Utah Code Section 49-11-102 for the new fiscal year is less than
- 70 the amortization rate for the preceding fiscal year, set aside an amount equal to the
- 71 value of the reduction in the amortization rate;
- 72 (ix) unless waived by majority vote, set aside an allocation to the Senate and House
- 73 of Representatives for legislator administrative and staff expenses described in
- 74 JR5-6-101;
- 75 (x) decide whether to set aside special allocations to the Senate and House of
- 76 Representatives for expenditures related to administering a legislative committee
- 77 defined in JR7-1-101, including travel and training expenses;
- 78 [~~(ix)~~] (xi) approve the appropriate amount for each subcommittee to use in preparing
- 79 its budget;
- 80 [~~(x)~~] (xii) set a budget figure; and
- 81 [~~(xi)~~] (xiii) adopt a base budget in accordance with Subsection (1)(b) and direct the
- 82 legislative fiscal analyst to prepare one or more appropriations acts appropriating
- 83 one or more base budgets for the next fiscal year.
- 84 (b) In a base budget adopted under Subsection (1)(a), the Executive Appropriations
- 85 Committee shall set appropriations from the General Fund, the Income Tax Fund,
- 86 and the Uniform School Fund as follows:
- 87 (i) if the next fiscal year ongoing revenue estimates set under Subsection (1)(a)(i) are
- 88 equal to or greater than the current fiscal year ongoing appropriations, the new
- 89 fiscal year base budget is not changed;
- 90 (ii) if the next fiscal year ongoing revenue estimates set under Subsection (1)(a)(i) are
- 91 less than the current fiscal year ongoing appropriations, the new fiscal year base
- 92 budget is reduced by the same percentage that projected next fiscal year ongoing
- 93 revenue estimates are lower than the total of current fiscal year ongoing
- 94 appropriations;
- 95 (iii) in making a reduction under Subsection (1)(b)(ii), appropriated debt service shall
- 96 not be reduced, and other ongoing appropriations shall be reduced, in an amount
- 97 sufficient to make the total ongoing appropriations, including the unadjusted debt
- 98 service, equal to the percentage calculated under Subsection (1)(b)(ii); and

- 99 (iv) the new fiscal year base budget shall include an appropriation to the Department
100 of Health and Human Services for Medicaid accountable care organizations in the
101 amount required by Utah Code Section 26B-3-203.
- 102 (c)(i) The Executive Appropriations Committee shall:
- 103 (A) comply with the set aside requirement described in Subsection [~~(1)(a)(vii)~~]
104 (1)(a)(viii) using money from the General Fund, Income Tax Fund, and
105 Uniform School Fund;
- 106 (B) accumulate money set aside under Subsection [~~(1)(a)(vii)~~] (1)(a)(viii) across
107 fiscal years; and
- 108 (C) when the total amount set aside under Subsection [~~(1)(a)(vii)~~] (1)(a)(viii),
109 including any amount to be set aside in the new fiscal year, equals or exceeds
110 the cost of a 0.50% increase in benefited state employee salaries for the new
111 fiscal year, include in the base budget an increase in benefited state employee
112 salaries equal to the total set aside amount.
- 113 (ii) The Executive Appropriations Committee may waive or modify a requirement
114 described in Subsection (1)(c)(i) by majority vote.
- 115 (d) The chairs of each joint appropriations subcommittee are invited to attend the
116 meeting described in this Subsection (1).
- 117 (2) All proposed budget items shall be submitted to one of the subcommittees named in
118 JR3-2-302 for consideration and recommendation.
- 119 (3)(a) After receiving and reviewing subcommittee reports, the Executive
120 Appropriations Committee may refer the report back to a joint appropriations
121 subcommittee with any guidelines the Executive Appropriations Committee
122 considers necessary to assist the subcommittee in producing a balanced budget.
- 123 (b) The subcommittee shall meet to review the new guidelines and report the
124 adjustments to the chairs of the Executive Appropriations Committee as soon as
125 possible.
- 126 (4)(a) After receiving the reports, the Executive Appropriations Committee chairs will
127 report them to the Executive Appropriations Committee.
- 128 (b) The Executive Appropriations Committee shall:
- 129 (i) make any further adjustments necessary to balance the budget; and
130 (ii) complete all decisions necessary to draft the final appropriations bills no later
131 than the last Friday before the 45th day of the annual general session.
- 132 (5) No later than December 1 of each calendar year, the Executive Appropriations

Committee shall:

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

Section 2. **JR5-1-102** is amended to read:

JR5-1-102 . Legislative Expenses Oversight Committee.

- (1) The presiding officer and the majority leader and minority leader of each chamber are the Legislative Expenses Oversight Committee for that chamber.
- (2) Each committee shall:
 - (a) establish procedures to implement the rules on legislative expenses, including establishing systems and procedures for:
 - (i) ~~[-]the reimbursement of legislative expenses; and~~
 - (ii) tracking the allocations for administrative and staff expenses under Chapter 6.
 - Administrative and Staff Expenses;
 - (b) ensure that procedures are established for the purpose of avoiding duplicate or improper payments or reimbursements; and
 - (c) meet at least annually, or at the request of a majority of the committee, to review legislative expenses and travel budgets.
- (3) Each committee may, for a calendar year, authorize up to 10 authorized legislative training days for each legislator.
- (4) The presiding officer may authorize temporary emergency legislative expenses.

Section 3. **JR5-6-101** is enacted to read:

CHAPTER 6. Administrative and Staff Expenses

JR5-6-101 . Annual budget for administrative and staff expenses.

- (1) As used in this rule, "legislative aide" means an individual who:
 - (a) is a non-benefited employee of the Senate or the House of Representatives, as applicable;
 - (b) serves at the pleasure of the legislator who hires the aide under this rule;
 - (c) is paid for up to 1,040 hours per fiscal year; and
 - (d) is not a member of the legislator's immediate family.
- (2) The Senate and House of Representatives shall ensure that the amount allocated by the Executive Appropriations Committee under JR3-2-402(1)(a)(ix) for legislator

administrative and staff expenses is allocated and administered in accordance with this rule.

(3) The Senate shall, each fiscal year, allocate from the amount described in Subsection (2):

(a) an equal amount to each senator; and

(b) a separate, additional amount to:

(i) the president;

(ii) the Senate majority leader; and

(iii) the Senate minority leader.

(4) The House of Representatives shall, each fiscal year, allocate from the amount described in Subsection (2):

(a) an equal amount to each representative; and

(b) a separate, additional amount to:

(i) the speaker of the House;

(ii) the House majority leader; and

(iii) the House minority leader.

(5) A legislator may only use the legislator's allocation under Subsection (3) or (4) to:

(a) hire one or more legislative aides; or

(b) pay for administrative and operational expenses related to the legislator's official legislative business.

(6) Any unused amount of a legislator's allocation under this rule lapses and may not be carried into the next fiscal year.

(7) If the Senate and House of Representatives receive an allocation from the Legislature under JR3-2-402(1)(a)(x), the Legislative Management Committee shall decide:

(a) which legislative committees receive all or a portion of the allocation; and

(b) the amount of each disbursement.

Section 4. Effective Date.

This resolution takes effect May 6, 2026.