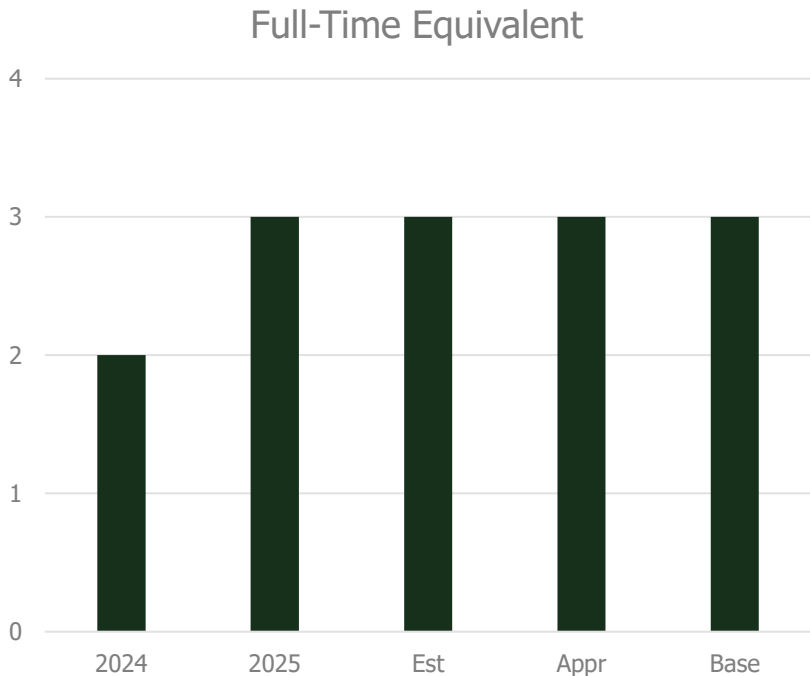


School & Institutional Trust Beneficiaries' Advocacy Office

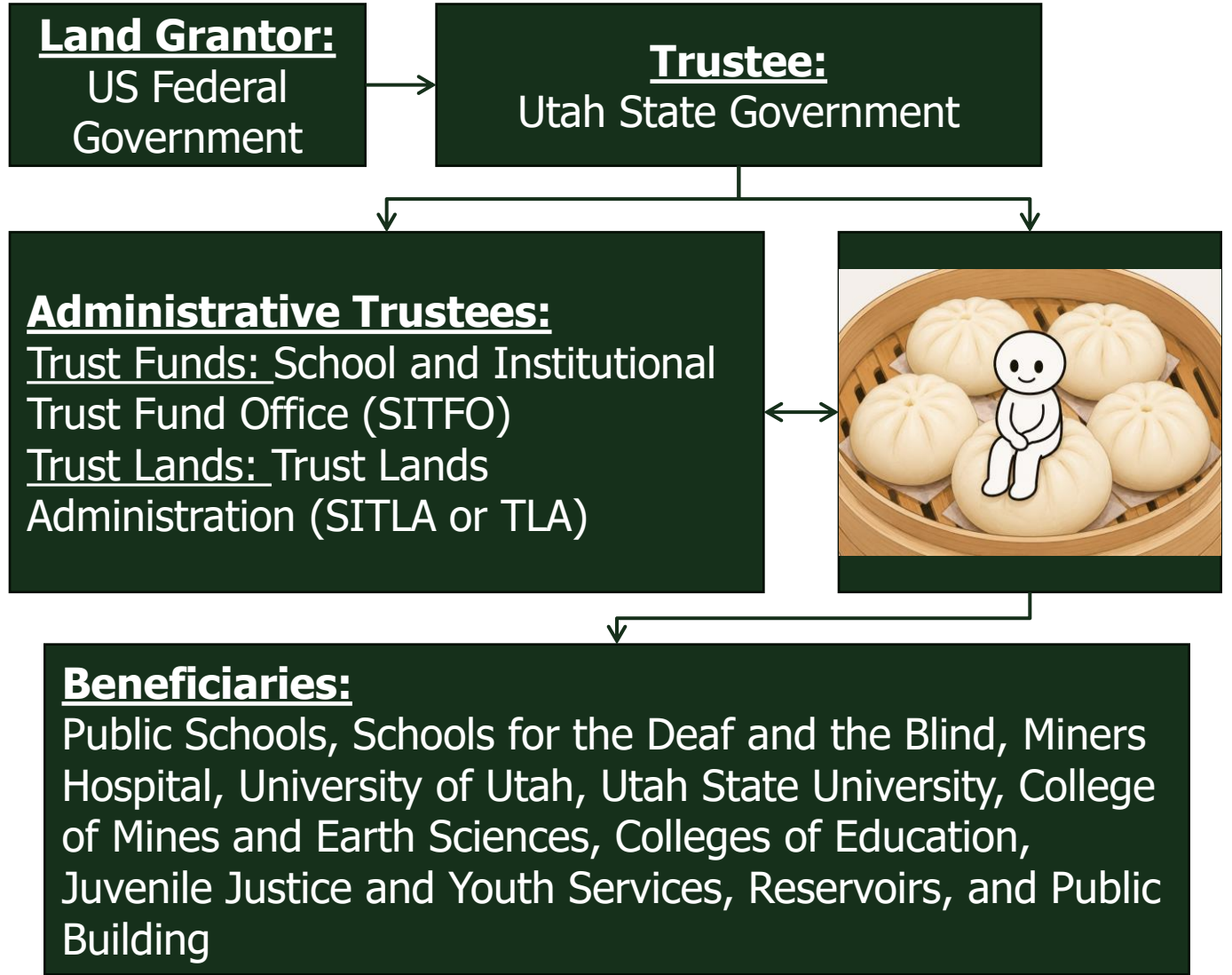
Mission: The Advocacy Office advances the rights and interests of the beneficiaries through accountability, relationship-building, information sharing, and advocacy.

Programs and Staff:

- Administration (100% of budget | 2 FTEs, 3 FTE budgeted)

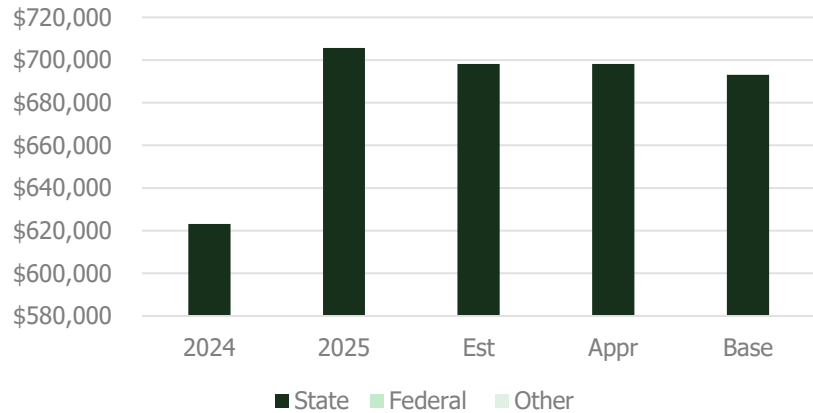


Organizational Structure

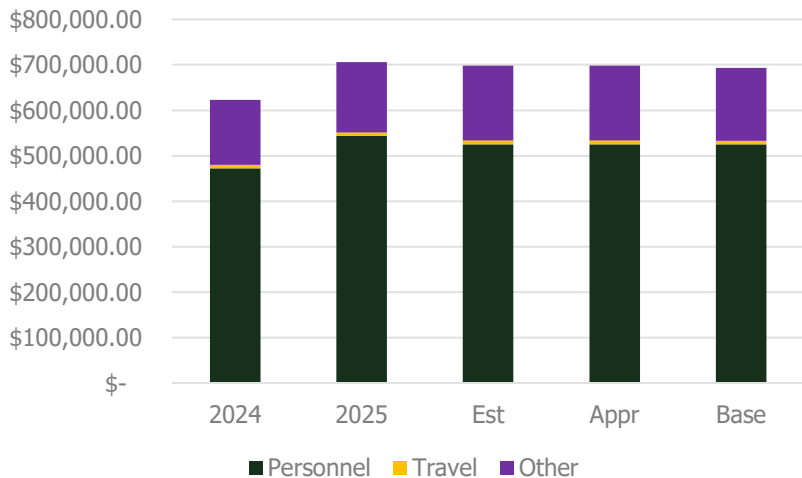


Advocacy Office

Funding Sources



Expenditures



Notable Budget Changes:

- In GS 2025, the Advocacy Office became their own Line Item in the Treasurer's budget.

Direct Award Grants:

- None

Accomplishments:

- Passage of SB 43 which redefined the office purpose and how the office functioned.

Challenges:

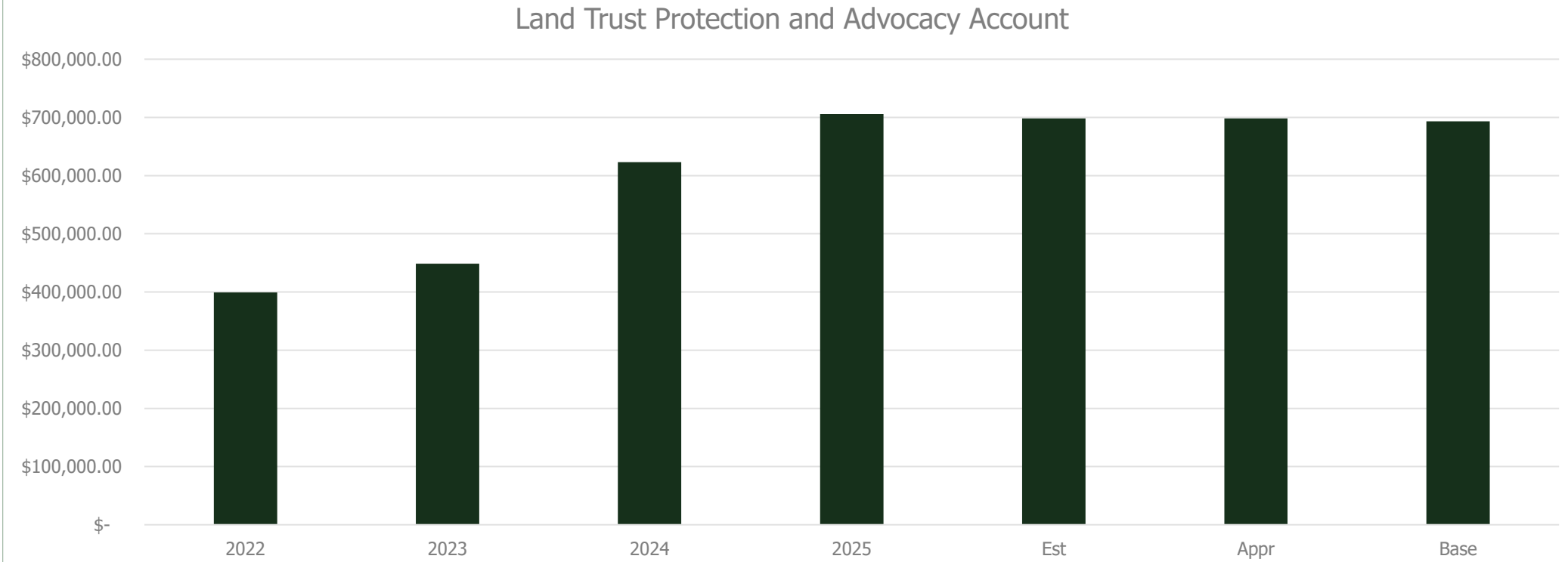
- Outstanding in lieu and quantity grant selections for Utah trust beneficiaries
- Public Building trust



Advocacy Office

Funding Source: Land Trusts Protection and Advocacy Account

Part of the Trust Fund earnings are used to fund the Advocacy Office, SITFO, and SITLA (TLA) as they monitor, invest, and manage the trust funds and trust lands. The graph below shows the change in the amount that the Advocacy Office uses since FY 2022



Advocacy Office

Performance Measures:

- **Measure 1:** Annual System Accountability Report Timeliness (Days After January 15 That Report Is Complete)
 - Has consistently hit goal,
 - Combine this measure with 4,
 - and create a new measure
- **Measure 2:** Beneficiary Representation
 - Continue measure
- **Measure 3:** Legislator Outreach Completion
 - Could provide specificity to increase productivity of meetings
 - Could narrow measure to newer Legislator
- **Measure 4:** Timeliness of Trust Reports
 - Similar to Measure 1, so we could combine them



Advocacy Office

Budget Process



Internal Controls

- Quarterly review budget and post actual findings to Advocacy Committee Dashboard
- Practices separation of duties with the State Treasurer's Office. All spending and travel is authorized through Treasurer's Office
- P-Card and Vendor contracts also go through Treasurer's Office for approval

Audit Results

- 2024 Trust System Performance Audit (OLAG): Currently implementing recommendations with SB43
- 2025 Department of Finance Audit: No major changes to implement



Advocacy Office

Recommendations:

- Agency suggests new performance measures that can be included in the base budget.

Areas of Further Study for Interim:

- Major projects currently being worked on (mainly Public Buildings Trust and in lieu and quantity grant selections)
- Areas that could use new performance measures
- Duplication of work (OLAG's audit found that there was duplication of work, and SB43 is designed to correct most of it apart from any remaining duplication that is set as intentional checks and balances. What are those remaining duplications and how do they provide checks and balances)

