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| Procedure Title: | Individual Expenditure Reports | | | | |
| Procedure Number: | DHS-010-002-01 | Version: | 1.0 | Effective Date: | 10/01/2003 |

DHS Director or Deputy Director

10/01/2003

Approved By: (Authorized Signer Name)

Date Approved

Procedure

| Step | Responsible Party | Action |
|------|-------------------|--|
| 1. | Staff | <p>On a quarterly basis, staff will provide details about lobbying activity to your cluster's Legislative Coordinator for each lobbying activity listed below.</p> <ul style="list-style-type: none"> • Date of activity • Length of time • Nature of activity. <p>On a quarterly basis, staff will provide their lobbying activity according to the due dates their cluster sets.</p> |
| 2. | Cluster | <p>Will track lobbying activity for all cluster employees on a quarterly basis as listed below.</p> <ul style="list-style-type: none"> • Quarter 1: January – March • Quarter 2: April – June • Quarter 3: July – September • Quarter 4: October – December |
| 3. | Cluster | <p>Will include the following information in the report:</p> <ul style="list-style-type: none"> • The amount of time spent lobbying • The cost of time spent lobbying • The amount of any lobbying expenses for which the agency pays <p>Exceptional costs incurred for the purpose of influencing legislative action, for example copying costs, binders, food/beverage/meals (agency incurred costs only)</p> <p>Note: Do not report expenses that registered lobbyists included in GSPC's "Lobbyist Expenditure Report."</p> |
| 4. | Cluster | <p>Will contact Finance and Policy Analysis representative to get average monthly salary that includes other payroll expense to use for calculating the cost of time spent lobbying.</p> |
| 5. | Cluster | <p>Will keep the detailed lobbying activity records for the cluster's employees for four years.</p> |

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| | | May use DHS 2020A, Individual Lobby Activity Record form to record the lobbying activity. |
| 6. | Cluster | Will report a summary lobby activity for each employee to the Legislative and Intergovernmental Relations Manager 15 days after the end of each quarter. Must use DHS 2020, Cluster Lobby Activity Record form to submit the cluster's lobbying activities. Must be able to provide detailed information to support the cluster's lobbying activities in the event of an audit. Each cluster should retain these records for four years. |
| 7. | DHS' Legislative and Intergovernmental Relations Manager | Will tally cluster reports to create DHS' Annual Entity Expenditure Report. |
| 8. | DHS' Legislative and Intergovernmental Relations Manager | Will submit the Department's Annual Entity Expenditure Report to the Oregon Government Standards and Practices Commission and maintain a central office copy for four years. |

Policy that applies:

[DHS-010-002, Working with the Legislature](#)

Form(s) that apply:

DHS 2020A, Individual Lobby Activity Record - [PDF](#) or [Excel](#)

DHS 2020, Cluster Lobby Activity Record - [PDF](#) or [Excel](#)

Contact(s):

Name: Director's Office Lobbying Coordinator; **Phone:** 503-945-6609;

Email: dhs.directorsoffice@state.or.us

Procedure History:

- **Version 1.0:**
10/01/2003 Initial Release

Keywords:

(List keywords here that might be used by someone to search for this policy on the internet)