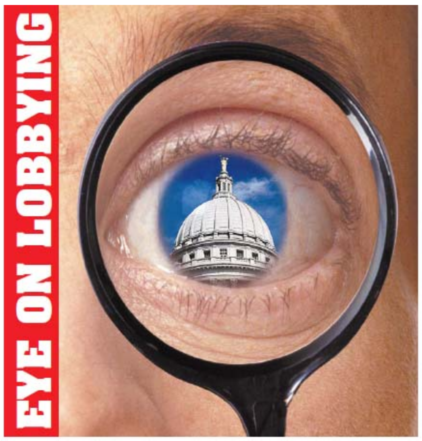

Eye on Lobbying
User Guide

Statement of Lobbying Activities & Expenditures
6 Month Reporting

2012

Wisconsin Government Accountability Board
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Table of Contents

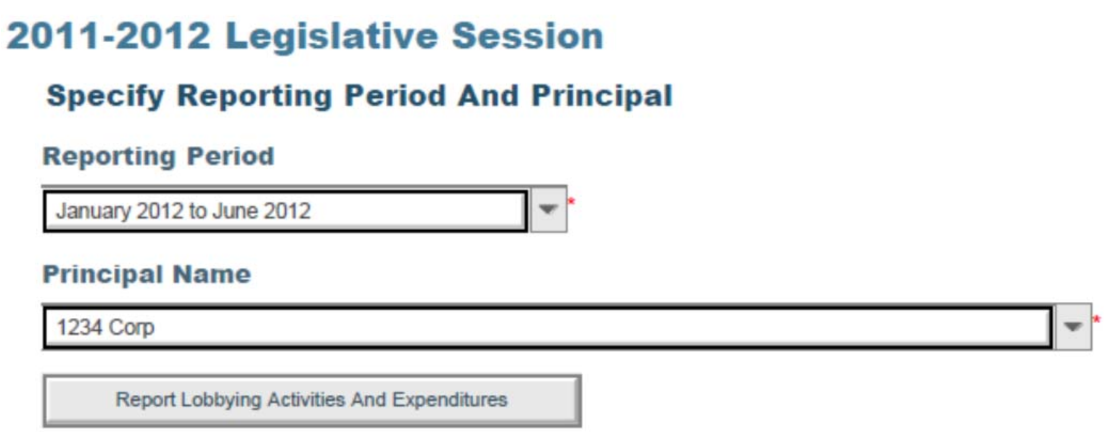
How to Complete the Statement of Lobbying Activities and Expenditures Report (6 Month Report)

You must have a user account and must be logged on to the site before you can enter 6 month activity and expenditure reports. If you do not have a user account or have problems logging on to the site, please refer to the Eye on Lobbying user guides “How to Create a User Account” and “Log On”.

1. After you have logged on to the site, click on “Submit 6 Month Report” from the left-hand menu beside the Welcome page.

2. On the next screen, click on “Enter Reports For Principals” from the left-hand menu.

3. Select the correct Reporting Period and Principal Name from the appropriate dropdown boxes.



4. Click on the button “Report Lobbying Activities and Expenditures”.

There are 5 steps to completing a 6 month report of activity and expenditures. Step One is the Lobbyist Time Report which is completed by the lobbyist. Steps 2 through 5 are completed by the lobbying principal. You can enter data for the organization’s portions of the report without the lobbyists’ time certifications. Note: You will not be able to certify and officially submit the report until all 5 steps are complete.

Steps 2 through 5 of this user guide will provide instructions for each reporting step that the principal must perform. If you have any questions, please contact a G.A.B. staff member at (608) 266-8005.

Step 1: Lobbyist Time Report (completed by authorized Lobbyist(s))

Step 1 is completed by the Lobbyists authorized to lobby on behalf of the Lobbying Principal. All Lobbyists authorized to lobby on behalf of the selected Principal for the 6 month period selected must certify their time report(s) before a Lobbying Principal can certify and submit their report (Step 5).

Lobbyist Time Report – Status

2011-2012 Legislative Session

January-June 2012

1234 Corp

STEP 1: LOBBYIST TIME REPORT

Name Of Authorized Lobbyist(s)	Date Lobbyist(s) Certified Time Report
Doe, Janie	Has Not Certified
Doe, Johnny	View Report 6/16/2012

Lobbying Principals complete the remaining sections of the SLAE report. (Steps 2 through 5)

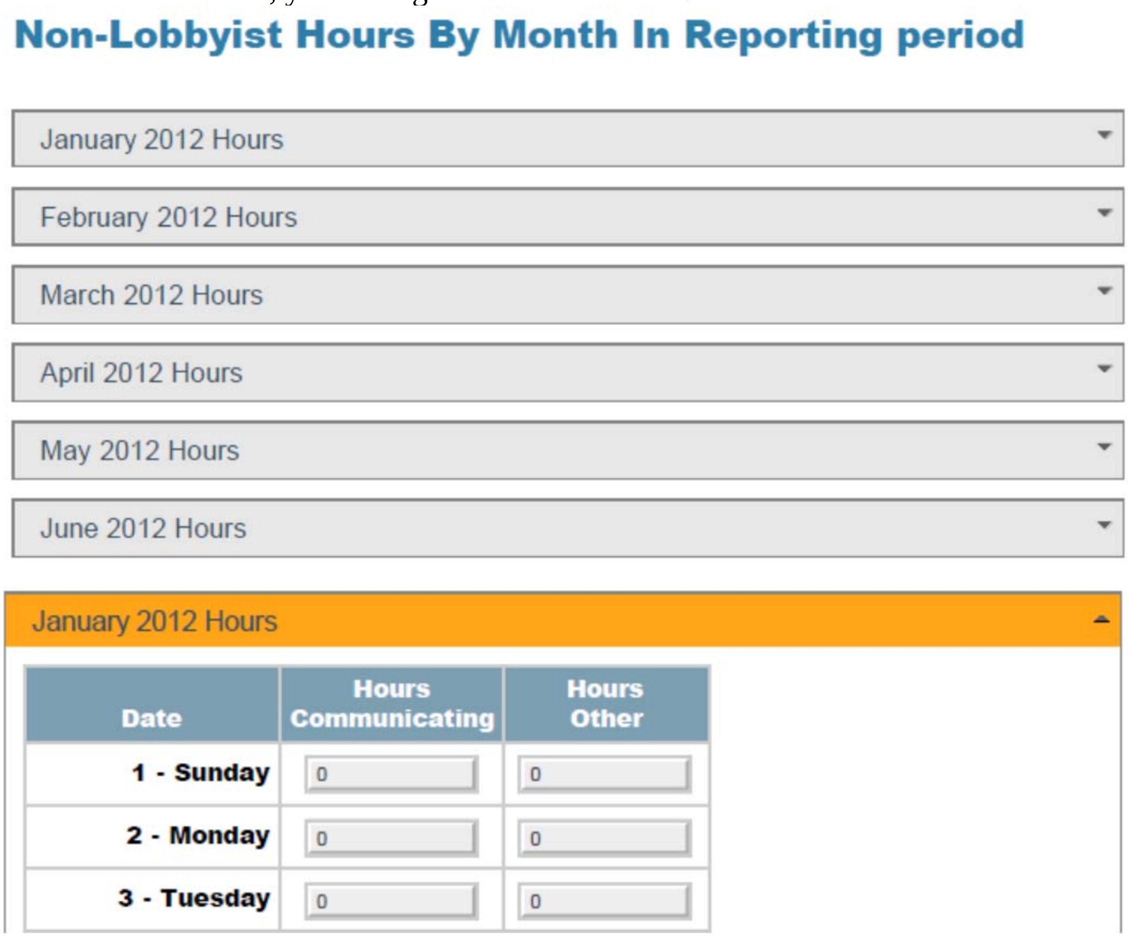
Step 2: Non-Lobbyist Time Report

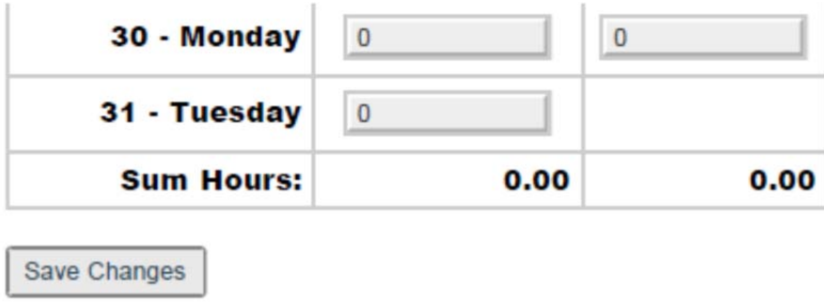
If you have non-lobbyist time to report, please follow the steps below. If you have no data to enter for Step 2, you may skip to Step 3: Time and Expenditure Summary.

Please refer to pages 6 and 7 for additional information about non-lobbyist time reports, definition of terms, and statutory requirements..

1. Click on the arrow to the right side of the calendar month name to expand the calendar. Enter communicating and other hours for the days of the month.

   You may use the “tab” button on the keyboard to move from field to field. If you use the “enter” button, your changes will **not** be saved.





2. When you have finished entering the hours for the day and/or month, click on the button “Save Changes”. Do **not** proceed to the next month without saving changes in the month you are currently working on.

   You must click the “Save Changes” button; if you use the “enter” button on the keyboard, your changes will **not** be saved.

   You may enter hours daily, weekly, or monthly until you are ready to submit the 6 month lobbying time report.

3. Proceed to Step 3: Time and Expenditure Summary. If you have completed data entry of the communicating and other hours for non-lobbyists, you may click on the button “Online Reporting Menu” or “Continue”.

Non-Lobbyist Time Report – Additional Information

What time must be recorded?
Record time that governmental affairs directors, senior managers, non-clerical employees (other than Lobbyists), and others who act under your organization's supervision or direction spent on lobbying-related activities. Do not record the time of your Lobbyist(s); that time is already reported in each Lobbyist's Time Report. Do not record time of clerical employees; of unpaid officers, directors, or volunteers; or of anyone who devoted 10 or fewer hours to lobbying-related activities.

This time report must accurately reflect a daily accounting of time your organization spends on lobbying-related activities. There are a number of ways your organization can have individuals account for time spent on lobbying-related activities. Use any reasonable method that helps you accurately record time spent on lobbying-related activities.

Example: Each individual may complete a daily or weekly time sheet to record lobbying-related activities; or you may attach routing slips to lobbying-related documents for each individual working on the document to record time.

What are lobbying-related activities?
Lobbying-related activities include:

- Efforts pertaining to the development, drafting, introduction, consideration, modification, adoption, rejection, review, enactment, or defeat of any bill, resolution, amendment, report, nomination, administrative rule or other matter by either house of the legislature.
- Efforts pertaining to the proposal, drafting, development, consideration, promulgation, amendment, repeal, or rejection by any agency of a rule promulgated under chapter 227.

How should time be recorded?
Record time either as Communicating or Other.

- Communicating.
  This category includes talking (in person or by telephone) and meeting with elected officials, legislative employees, agency officials, and other state employees with decision-making authority for legislative or administrative action, as well as speaking at public hearings. This category does not include letter-writing.

- Other lobbying-related activities.
  This category includes time spent monitoring legislative and state agency activities; writing letters; meeting with members or employees of the

organization, colleagues, and others to discuss lobbying issues and strategy; collecting, compiling, or analyzing facts, data, or other information; preparing to communicate with elected officials, legislative employees, agency officials, and other state employees with decision-making authority for legislative or administrative action; preparing correspondence; and preparing others to lobby.

DO NOT record time spent:

- by your organization's licensed Lobbyist(s). That time should be recorded in each Lobbyist's Time Report.
- by clerical staff.
- by unpaid volunteers.
- by employees who have spent no more than 10 hours in lobbying-related activities.
- furnishing information in response to the request of an agency official (but include time furnishing information requested by legislators or legislative employees).
- participating as a member in the deliberations of (a) a committee appointed by a state agency under §227.13, Wisconsin Statutes, to advise the agency with respect to rule-making; or (b) a committee of the legislature.
- traveling that does not include any lobbying-related activity.

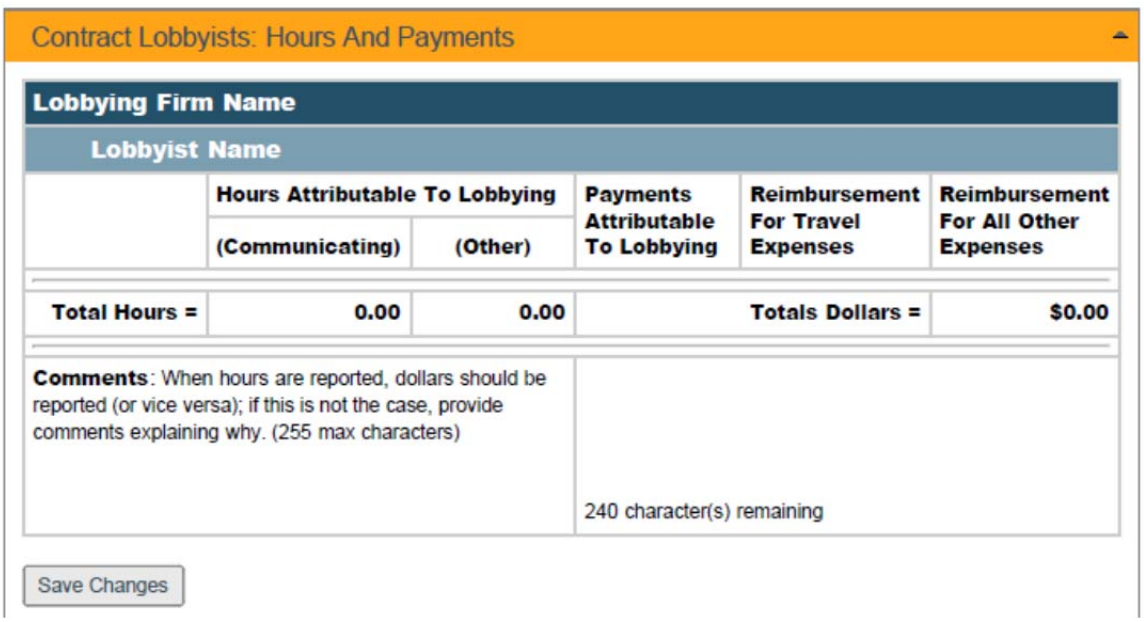
You may record actual time or round up to fifteen-minute increments.

Step 3: Time and Expenditure Summary

Please refer to pages 12 through 14 for additional information about the time and expenditure summary, definition of terms, and statutory requirements.

1. Click on the arrow to the right of the "Contract Lobbyists: Hours And Payments" option to expand the data entry screen. Enter dollar amounts for "Payments Attributable to Lobbying", "Reimbursement for Travel Expenses" and "Reimbursement for All Other Expenses". Enter any comments that are necessary.

2. Click "Save Changes".



Contract Lobbyists: Hours And Payments

Lobbying Firm Name

Lobbyist Name

	Hours Attributable To Lobbying (Communicating)	(Other)	Payments Attributable To Lobbying	Reimbursement For Travel Expenses	Reimbursement For All Other Expenses
Total Hours =	0.00	0.00		Totals Dollars =	$0.00

Comments: When hours are reported, dollars should be reported (or vice versa); if this is not the case, provide comments explaining why. (255 max characters)

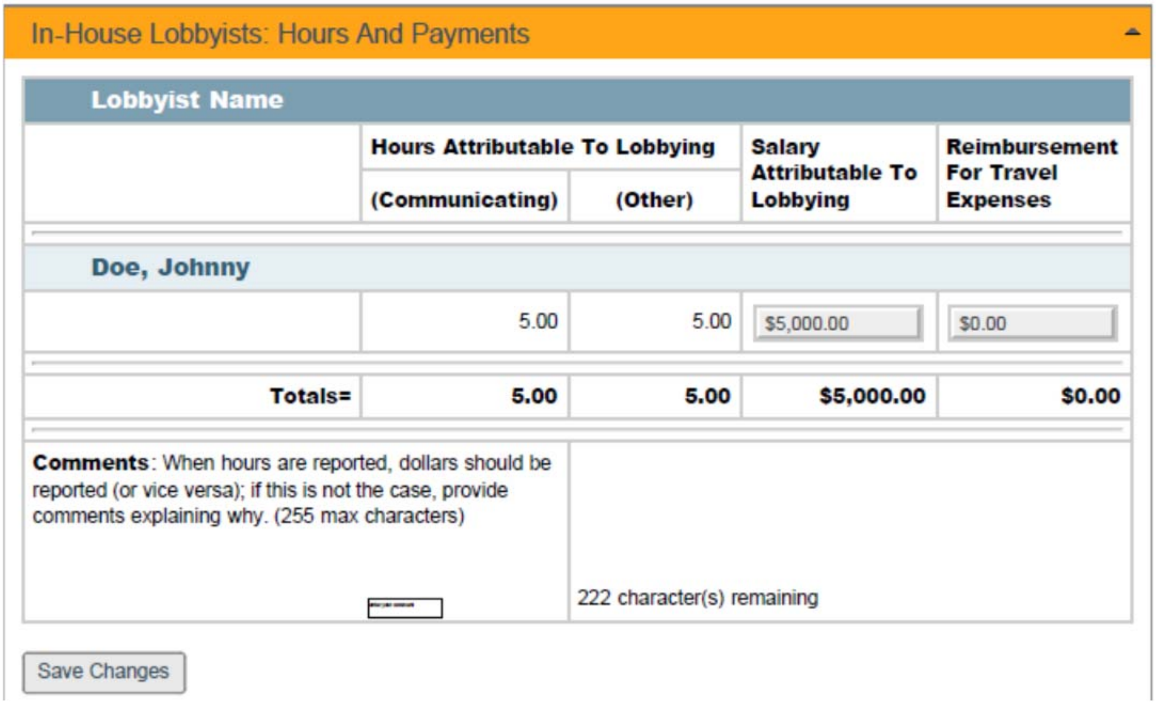
240 character(s) remaining

Save Changes

3. Collapse the menu by clicking on the arrow again to make it easier to move on to the next data entry task.

4. Click on the arrow to the right of the "In-House Lobbyists: Hours and Payments" option to expand the data entry screen. Enter dollar amounts for "Salary Attributable to Lobbying" and "Reimbursement for Travel Expenses". Enter any comments that are necessary.

5. Click "Save Changes".



In-House Lobbyists: Hours And Payments

Lobbyist Name	Hours Attributable To Lobbying (Communicating)	(Other)	Salary Attributable To Lobbying	Reimbursement For Travel Expenses
Doe, Johnny				
	5.00	5.00	$5,000.00	$0.00
Totals=	5.00	5.00	$5,000.00	$0.00

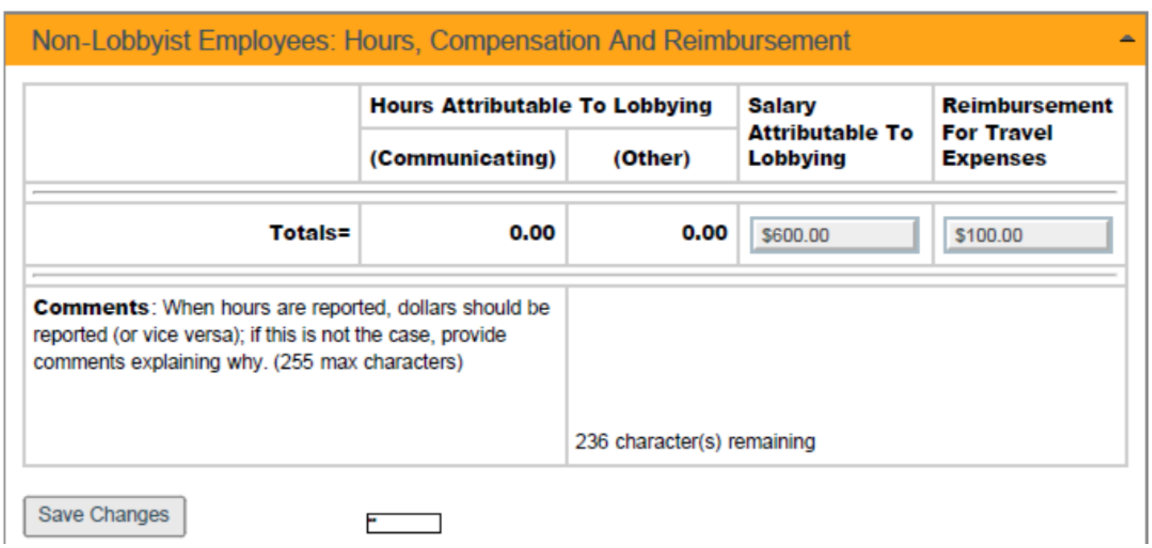
Comments: When hours are reported, dollars should be reported (or vice versa); if this is not the case, provide comments explaining why. (255 max characters)

222 character(s) remaining

Save Changes

6. Collapse the menu by clicking on the arrow again to make it easier to move on to the next data entry task.

7. Click on the arrow to the right of the “Non-Lobbyist: Hours, Compensation And Reimbursement” option to expand the data entry screen. Enter dollar amounts for “Salary Attributable to Lobbying” and “Reimbursement For Travel Expenses”. Enter any comments that are necessary.



Non-Lobbyist Employees: Hours, Compensation And Reimbursement

	Hours Attributable To Lobbying (Communicating)	(Other)	Salary Attributable To Lobbying	Reimbursement For Travel Expenses
Totals=	0.00	0.00	$600.00	$100.00

Comments: When hours are reported, dollars should be reported (or vice versa); if this is not the case, provide comments explaining why. (255 max characters)

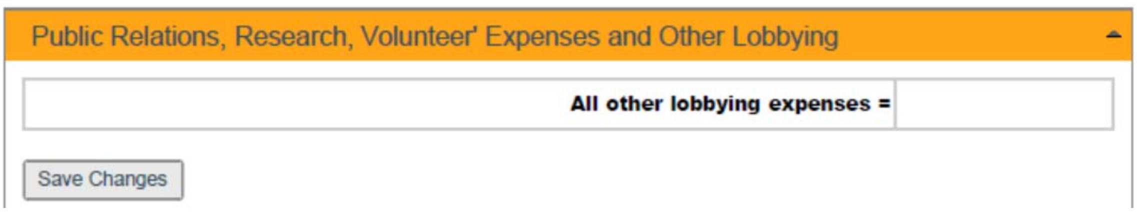
236 character(s) remaining

Save Changes

8. Click “Save Changes”.

9. Collapse the menu by clicking on the arrow again to make it easier to move on to the next data entry task.

10. Click on the arrow to the right of the "Public Relations, Research, Volunteer Expenses and Other Lobbying" option to expand the data entry screen. Enter the dollar amount of the expenses.

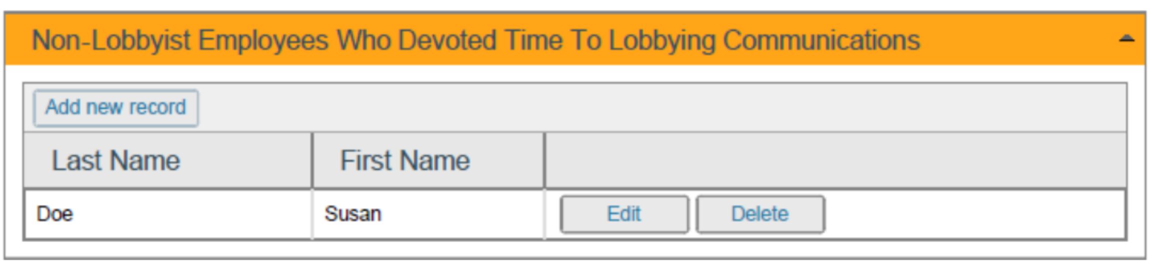


11. Click "Save Changes".

12. Collapse the menu by clicking on the arrow again to make it easier to move on to the next data entry task.

13. Click on the arrow to the right of the "Non-Lobbyist Employees Who Devoted Time To Lobbying Communications" option to expand the data entry screen.

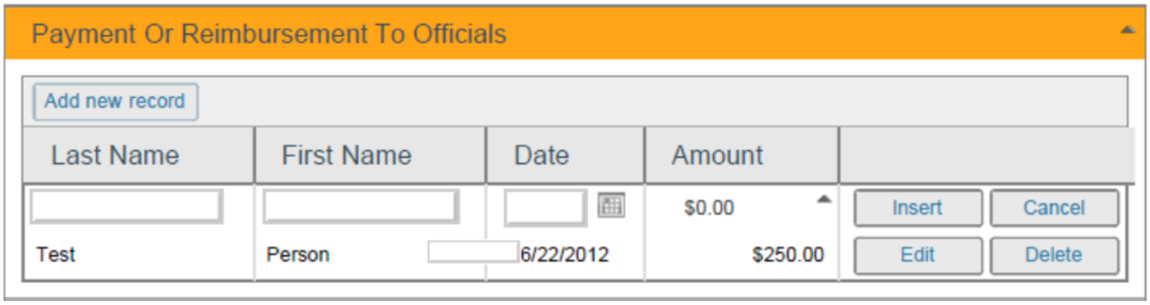
14. To add a person, click on the button "Add New Record". Enter last name and first name. Click on the "Insert" button. You must click the "Add New Record" button to add each employee individually.



15. Collapse the menu by clicking on the arrow again to make it easier to move on to the next data entry task.

16. Click on the arrow to the right of the "Payment Or Reimbursement To Officials" option to expand the data entry screen.

17. To add a person, click on the button "Add New Record". Enter last name and first name. Enter date of service. Enter amount paid to the official. Click on the "Insert" button. You must click the "Add New Record" button to add each official and corresponding detail.



18. You may collapse the “Payment Or Reimbursement To Officials” section now or you can click on the “Continue” button or the “Online Reporting Menu” button to proceed to the next step of reporting, Step 4: Allocation Of Lobbying Effort.

Time and Expenditure Summary – Additional Information

Hours:

For each Lobbyist, hours will automatically be transferred to the organization's report once the Lobbyist has "certified" the Lobbyist's time report.

Dollars:

For contract Lobbyists, enter payments and obligations the organization made or incurred during the reporting period to each contract Lobbyist for lobbying and lobbying-related activities (including retainers, fees, other compensation, and reimbursement of expenses that were charged separately). If you retained two or more contract Lobbyists from the same lobbying firm and are unable to allocate the portion of the total lobbying payment attributable to each, you may list the payment to the lobbying firm, instead of to an individual Lobbyist.

For in-house Lobbyists, enter the portion of salaries the organization paid each officer-director- and employee-lobbyist for lobbying-related activities during the reporting period.

If a person is paid on an hourly basis, use this calculation:

Hourly wage x Number of lobbying-related hours

If a person is paid on a salaried basis, use this calculation:

Salary paid x lobbying-related hours ÷ total hours worked

If the organization compensated a Lobbyist both for lobbying activities and other activities and payments for lobbying represent 85% or more of the individual's total compensation, you may report the entire amount of compensation paid to the lobbyist.

List reimbursement of travel and other expenses that were paid separately.

Do not report amounts reported in a prior period.

Section B: Non-lobbyist Employees: Hours, Compensation and Reimbursement

Hours: Hours will automatically be transferred from the daily itemized non-lobbyist time report to Section B.

Dollars: Enter the portion of salaries attributable to lobbying-related activities.

If a person is paid on an hourly basis, use this calculation:

Hourly wage x Number of lobbying-related hours

If a person is paid on a salaried basis, use this calculation:

Salary paid x lobbying-related hours ÷ total hours worked

When making the computation you may disregard payments to an employee who devoted no more than 10 hours to lobbying-related activities during the reporting period. If the organization compensates an employee both for lobbying activities and other activities and payments for lobbying represent 85% or more of the individual's compensation, you may report the entire amount of the compensation paid to the employee. Include salaries earned but not yet paid. Do not report amounts reported in a prior period.

Section C: Public Relations, Research, Volunteers' Expenses and Other Lobbying Costs

Identify all lobbying expenses and obligations your organization made or incurred during the reporting period not already reported and not included in overhead. Do not include fees paid to the Government Accountability Board. Do not include in-house costs.

Include the following items:

- Contract Research. Payments and obligations for conducting, compiling, or preparing research, information, statistics, or analyses that would not have been incurred but for lobbying and costs of providing it to state officials.

- Research undertaken and used solely for lobbying. Report total amount of expenditures if research is used within 3 years of completion.

- Research undertaken for lobbying and used for additional purposes. Report only that portion of expenditures allocated for lobbying research (if used within 3 years of completing the research).

- Research undertaken for non-lobbying purposes and used in lobbying. Do not report an expenditure for research that would have been undertaken regardless of its use in lobbying.

- Public Relations. Costs for advertising and activities to urge the public to attempt to influence state legislation or administrative rules (if payments and obligations exceed $500 for the reporting period).

- Volunteers' Expenses. Costs of persuading and assisting members or volunteers to attempt to influence state legislation or administrative rules and reimbursements of members and volunteers for activities that pertained to lobbying. Exclude travel-related expenses already reported for lobbyists and non-lobbyist employees.

Section D: Non-lobbyist employees who devoted time to lobbying communications

List the names of your organization's paid employees who, although not Lobbyists, spoke in person or by phone or wrote to a legislator, legislative employee, or agency official during the reporting period in order to influence legislative action or administrative rulemaking.

Section E: Payment or Reimbursement to Officials

If the organization or its lobbyist paid or reimbursed an elected state official, state agency official, legislative employee, or candidate for elective state office, provide the date, the name of the recipient, and the amount of each payment. The organization is responsible for obtaining this information from its lobbyists and reporting it.

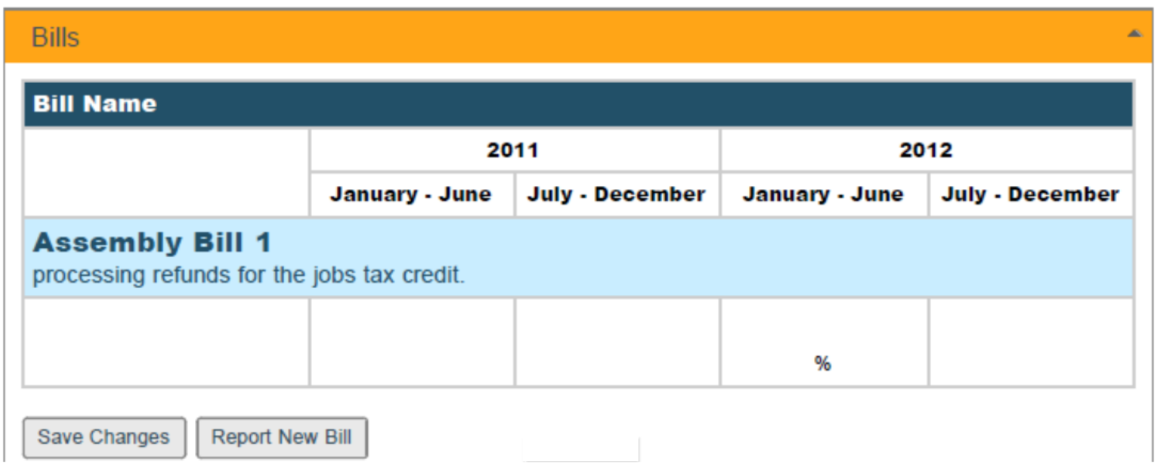
Note that state officials report to the Government Accountability Board their receipt of payments exceeding $50.

Step 4: Allocation of Lobbying Effort

Please refer to pages 19 and 20 for additional information about allocation of lobbying effort, definition of terms, and statutory requirements.

1. Click on the arrow to the right of the "Bills" option to expand the data entry screen. Enter the percentage of effort allocated to each bill lobbied on behalf of the organization.

2. Click on the "Save Changes" button. If you have to add a bill that you forgot to add earlier in the session, click on the "Report New Bill" button. If you need assistance with that process, please refer to the "15 Day Reporting" user guide.



3. Collapse the menu by clicking on the arrow again to make it easier to move on to the next data entry task.

4. Click on the arrow to the right of the "Budget Bill Subjects" option to expand the data entry screen. Enter the percentage of effort allocated to each budget bill subject lobbied on behalf of the organization.

5. Click on the "Save Changes" button. If you have to add a budget bill subject that you forgot to add earlier in the session, click on the "Report New Budget Bill Subject" button. If you need assistance with that process, please refer to the "15 Day Reporting" user guide.

Budget Bill Subjects

Budget Bill Subject Name				
	2011		2012	
	January - June	July - December	January - June	July - December
Government Accountability Board				
			%	

Save Changes | Report New Budget Bill Subject

6. Collapse the menu by clicking on the arrow again to make it easier to move on to the next data entry task.

7. Click on the arrow to the right of the "Administrative Rules" option to expand the data entry screen. Enter the percentage of effort allocated to each administrative rule lobbied on behalf of the organization.

8. Click on the "Save Changes" button. If you have to add an administrative rule that you forgot to add earlier in the session, click on the "Report New Administrative Rule" button. If you need assistance with that process, please refer to the "15 Day Reporting" user guide.

Administrative Rules

Administrative Rule Description				
	2011		2012	
	January - June	July - December	January - June	July - December
Government Accountability Board Revises section GAB 1.28 (3) (b), relating to the definition of the term "political purpose."				
			%	

Save Changes | Report New Administrative Rule

9. Collapse the menu by clicking on the arrow again to make it easier to move on to the next data entry task.

10. Click on the arrow to the right of the "Topics" option to expand the data entry screen. Enter the percentage of effort allocated to each topic lobbied on behalf of the organization.

11. Click on the “Save Changes” button. If you have to add a topic that you forgot to add earlier in the session, click on the “Report New Topic” button. If you need assistance with that process, please refer to the “15 Day Reporting” user guide.

Topics

Topic Description				
	2011		2012	
	January - June	July - December	January - June	July - December
333				
			0 %	
My New topic 1				
			0 %	

Save Changes | Report New Topic

12. Collapse the menu by clicking on the arrow again to make it easier to move on to the next data entry task.

13. Click on the arrow to the right of the “Minor Efforts” option to expand the data entry screen. Enter the percentage of time spent on matters which accounted for less that 10% of the organization’s total lobbying effort.

14. Click on the “Save Changes” button.

Minor Efforts

Description				
	2011		2012	
	January - June	July - December	January - June	July - December
(Time spent on matters each of which accounted for less than 10% of the organization's lobbying)				
			%	

Save Changes

15. Collapse the menu by clicking on the arrow again to make it easier to move on to the next data entry task.

16. Click on the arrow to the right of the “Other Matters” option to expand the data entry screen. Enter the percentage of time spent lobbying on other matters such as gubernatorial nominations and matters on which the organization made no lobbying communication.

17. Click on the “Save Changes” button.

The total percentage of effort should equal 100%. You can either click on the “Continue” or “Online Reporting Menu” to move on to Step 5: Verification of Totals and Certification.

Allocation of Effort – Additional Information

How To Report Percentages of Lobbying Effort

Under Wisconsin's lobbying law, every organization that employs a Lobbyist identifies to the Government Accountability Board throughout the reporting period each bill, budget bill subject, proposed administrative rule, and topic not assigned a bill or clearinghouse rule number in connection with which the organization has made a lobbying communication. For each bill, budget bill subject, proposed rule, or topic not assigned a bill or clearinghouse rule number the organization is to provide a reasonable estimate of the percentage of the organization's total lobbying-related time during the reporting period that is associated with that item.

The Government Accountability Board has provided your organization with a list of the bills, budget bill subjects, proposed rules, and topic not assigned a bill or clearinghouse rule number your organization has identified.

Estimating percentage of lobbying activity for each bill, budget bill subject, rule, and topic not assigned a bill or clearinghouse rule number.

When estimating the portion of your organization's lobbying-related time associated with an item, account for development, planning, research, in-house discussions, and communications with state officials and staff. If pertinent, include time spent developing or seeking introduction of a proposal and time that may have been spent prior to the organization's identification of an item to the Government Accountability Board. Account for the reported time of all Lobbyists as well as all time reported for non-lobbyist officers, directors, and employees. Express time as a whole percent from 1 to 100.

Budget Bill Subjects

When estimating the portion of your organization's lobbying-related time associated with an item, treat each budget bill subject as a separate item.

Similar and Related Proposals

If your organization lobbied on two or more related items, use your best judgment in assigning a reasonable estimate of the percentage of lobbying-related time associated with each item as a whole percent from 1 to 100.

Minor Lobbying Efforts

If you estimate that the organization spent less than 10% of its lobbying-related time on a specific bill, proposed rule, budget bill subject, or topic, you may either [1] record that

estimate next to that item or [2] enter at "Minor lobbying efforts" the estimated total portion of the organization's lobbying-related time spent on listed items for which you have not entered a specific estimate (and each of which accounted for less than 10% of the organization's total lobbying-related time).

No Lobbying Communication

If your organization directed a portion of its total lobbying-related time toward matters on which the organization made no lobbying communication, record at the space designated an estimate of the percentage of lobbying-related time the organization spent on those matters during this reporting period.

<u>Time estimates must total 100%.</u>

Clearinghouse Rule Numbers

The Government Accountability Board's web site section, Administrative Rulemaking Proceedings, displays all proposed rules by state agency and provides clearinghouse rule numbers.

Adding or Deleting Items

If a specific bill, rule, budget bill subject, or topic you have made a lobbying communication on is missing from the list that appears on the Government Accountability Board's website

- use the "Report New" button to report the proposal or topic

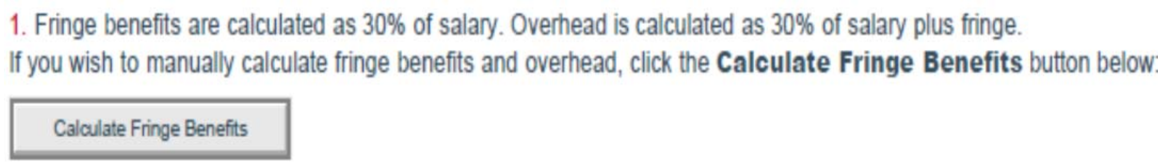
If a lobbying communication was not made on the omitted item, the item does not need to appear in this section of the report; rather lobbying-related time for this proposal/topic may be reported in the "No lobbying communication" section of the report.

Step 5: Verification of Totals and Certification

Please refer to pages 22 and 23 for additional information about allocation of lobbying effort, definition of terms, and statutory requirements.

1. Review all of the information displayed on the screen for you. If you find an error, go back to the appropriate step to fix the error.

2. If you would like to manually calculate fringe benefits and overhead costs, click on the "Calculate Fringe Benefits" button near the bottom of the screen. If not, leave the default values calculated by the system.



3. Click on the "Certify and Submit All Parts of This Statement to the Government Accountability Board" button.

4. You will receive a confirmation email of your report submission.

You have now completed your 6 Month reporting obligation.

If you have any questions or require assistance to file your report, please contact a G.A.B. staff member at (608) 266-8005.

Verification of Totals and Certification – Additional Information

Verifying Data Entered and Totals

A cursory review may be done at this time prior to certifying your report and sending it to the Government Accountability Board. If there are any omissions, or errors that have not yet been corrected, you will be alerted to them during the verification process and you will have the ability to correct the omissions or errors at this time.

Fringe Benefits and Overhead

You are encouraged to use the standard method 30% to calculate the fringe benefits and overhead for your employees, this is a value derived from the Internal Revenue Service. However if you choose to manually calculate your organization's fringe benefits and overhead, a worksheet has been provided and comments need to be included describing how the manually calculated values were derived.

Fringe benefits include an accounting for:

health insurance,
life insurance,
income continuation insurance,
social security,
retirement,
automobile,
paid leave, and
other benefits

Overhead include an accounting for the organization's expenditures and obligations for regular, continuing expenses for:

office space,
utilities,
computers and other office equipment,
office supplies,
books,
periodicals,
clerical support,
security,
employee parking, and
similar items attributable to lobbying activities

Certification

By clicking "certify" your complete report will be sent to the Government Accountability Board.
Print a copy of your report and retain this copy for 3 years from the date the report was due.
Once your report has been certified, it can no longer be edited; if the report requires an amendment, contact the Ethics and Accountability Division at gabethics@wi.gov **or by phone at (608) 266-8005.**