

**WISCONSIN
STATE SENATE**



POLICY MANUAL

2023-2024

Adopted by the
Committee on Senate Organization
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This document is intended to function as a general guide and reference relative to employment with and operations of the Wisconsin State Senate. This document and the information contained, referred to, or mentioned herein, are not intended to create nor should be construed to constitute a contract of employment between the Senate and any one or all of its employees. There is no expectation of continued employment with the Wisconsin State Senate.

Since no policy manual can address every situation that may arise, it may be necessary to modify or vary from this policy manual. The right to modify, amend, add or delete any policy, procedure or benefit set forth in this policy manual, at any time, for any reason, with or without notice, is reserved by the Committee on Senate Organization.



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EMPLOYMENT

Appointing Authority

An appointing authority is defined as a Senator, the Senate Chief Clerk and Director of Operations (hereafter “Chief Clerk”), or the Senate Sergeant at Arms (hereafter “Sergeant at Arms”). The appointing authority is responsible for hiring their employee(s) and handling all personnel decisions regarding raises, discipline, vacation usage, leave of absence, reasonable accommodations and compensatory time. The appointing authority is required by the Joint Committee on Legislative Organization’s (JLO) rule to verify and sign each of their employee’s time sheets. See “Time Reporting” on page 9 for further information.

Employment-at-Will

All employees of the Senate are in the unclassified, non-represented service, and as employees of the legislative branch of state government, are subject only to those rules and laws governing unclassified, non-represented employees of the Senate. In most cases, the Senate determines which of these rules and laws apply to Senate employees. Employees serve at the pleasure of the appointing authority and the employment relationship may be terminated by the appointing authority or by the employee at any time without cause or notice. There is no expectation of continued employment with the Senate.

Equal Employment Opportunity

The Senate is committed to providing equal employment opportunity in all terms, conditions, and privileges of employment, including but not limited to recruitment, certifications, selection, job assignments, working conditions, fringe benefits, compensation, training, transfer, layoffs, disciplinary actions, terminations, and promotions.

The Senate does not discriminate in employment on the basis of race, color, creed, sex (including pregnancy), religion, national origin or ancestry, age (40 or older), disability, marital status, sexual orientation, gender identity, arrest or conviction record, military service, use or nonuse of lawful products, genetic information, or any other applicable

protected classification as specified by state and federal law, except as permitted under applicable law.

Harassment by supervisors or co-workers in employment or service delivery on the basis of race, color, creed, sex (including pregnancy), religion, national origin or ancestry, age (40 or older), disability, marital status, sexual orientation, gender identity, arrest or conviction record, military service, use or nonuse of lawful products, genetic information, or any other applicable protected classification as specified by state and federal law is an unlawful employment practice prohibited in the Senate. The Senate provides reasonable accommodations for persons with disabilities to ensure equal access to employment.

Senate employees should not be expected to perform work of a personal nature for their appointing authority, or engage in any other activities not related to the official business of state government.

In addition, please refer to “Harassment and Discrimination” in *Appendix II* for the complete policy.

Equal Access to Program Services and Contracts

The Senate is committed to providing fair and equitable service to the public. The Senate does not discriminate in any program, activity, or procurement on the basis of race, sex (including pregnancy), religion, national origin or ancestry, age (40 or older), disability, marital status, sexual orientation, gender identity, military service, use or nonuse of lawful products, genetic information, political affiliation or belief, arrest or conviction record, or any other protected classification as specified by state and federal law. The Senate will make reasonable accommodations to ensure equal access to program services and contracts by individuals with disabilities. Anyone in need of a reasonable accommodation should contact the Chief Clerk’s office, Sergeant at Arm’s Office or the Legislative Human Resources Office (LHRO).

Compliance Procedure

The Senate compliance procedure provides for prompt and fair resolution of complaints alleging harassment, discrimination, and retaliation in employment. Please refer to *Appendix II* (Harassment and Discrimination) for the complete policy and contact the LHRO with any questions.

Implementation of Employment Policies

All appointing authorities are directly responsible for successful application of all employment policies.

Staff Allocation

The Committee on Senate Organization determines the biennial staffing allocation for each office. Generally, the total number of positions with fringe benefits is limited within each office. Each Senator is allowed one Executive Assistant (EA) classification, with the remaining positions being classified as Legislative Assistants (LA). The offices of Senate President Pro Tempore, Assistant Majority Leader, Assistant Minority Leader, Majority Caucus Chair, and Minority Caucus Chair are allowed one extra EA classification. The offices of Senate President and Co-chair of the Joint Committee on Finance are allowed two extra EA classifications. The offices of Majority Leader and Minority Leader are allowed additional EA classifications at their own discretion. In addition, the offices of the President, Minority Leader and Co-chair of the Joint Committee on Finance are each allowed one Administrative Officer classification, and the Majority Leader is allowed one Executive Officer classification. The Majority Leader may distribute two additional staff, EAs or LAs, to majority members and the Minority Leader may distribute two additional staff, EAs or LAs, to minority members. These four positions will not be charged to the member's salary account budget.

Job Sharing

The appointing authority may authorize the sharing of not more than one authorized benefited position within his or her office if both individuals work a combined total of 100% time and the arrangement

is expected to continue for a minimum of one year. Requests for job sharing must be reviewed by the LHRO to verify compliance with Chapter 3 of the Wisconsin Retirement System Manual (ET-1127).

Assignment of Classifications and Steps

The Committee on Senate Organization has adopted guidelines for determining each employee's classification and step level.

The LHRO shall make a determination of each new employee's proper classification and step level, according to these guidelines. Upon request by the appointing authority, the LHRO will inform the appointing authority of each employee's maximum eligibility level, and with the consent of the appointing authority, adjust the employee to the proper classification and step level. An employee may transfer to the Senate from another state agency without loss of pay status if the employee qualifies for the salary under the Senate guidelines. However, this does not exempt the employee's salary from any applicable salary budget.

A Senator may provide a letter to the LHRO initiating a new hire at any time during the current pay period, effective the first day of the current pay period. Any request to put into effect an employment start date before the first day of the current pay period will be denied.

Compensation Adjustment

A General Wage Adjustment may be granted as provided by law and determined by the JCLO. The salary allotment for staff and compensation ranges may be adjusted accordingly. Available salary increases, however, are granted at the discretion of the appointing authority. A Senator may provide a letter to the LHRO granting a salary increase at any time during the current pay period, effective the first day of the current pay period. Any request to put into effect a salary increase before the first day of the current pay period will be denied.

Hours of Work – Compensatory (Comp) Time

Within each pay period, each full-time Senate staff member shall work at least an average of 40 hours each workweek. If leave is used, the total amount of work plus authorized leave must average a total of at least 40 hours per workweek for the pay period, as indicated on the employee’s electronic CapIO timesheet. Work will be scheduled at the discretion of each appointing authority to allow completion of assigned tasks on schedule and to ensure that each employee works the minimum number of hours. There is no additional compensation for overtime work, as salaries are considered to be commensurate with employee responsibilities. Compensatory time off is not an official benefit conferred by the Senate. However, recognizing the irregularities of the Senate’s schedule and the variable work load during different time periods, the appointing authority may, at his or her discretion, authorize an employee compensatory time off for hours worked in excess of the minimum.

An employee may not engage in campaign activity while on compensatory leave. Any compensatory time off granted by a Senator must be used during the Senator’s term of office, unless the Senator specifies a shorter period for usage. In the event that a Senator leaves office before his or her term ends, any compensatory time off that has been granted by that Senator must be used before the succeeding Senator assumes office. Any compensatory time off granted by the Chief Clerk or Sergeant at Arms must be used in the biennium it is accumulated, unless it is granted during the final two months of the biennium. Any compensatory time off that is not used during the above specified time periods is forfeited. Please note that when an employment relationship is terminated, the employee cannot receive payment for unused compensatory time off.

Paid Time Off

Holidays

The following is a list of paid holidays for all employees, except for LTEs (see s. 230.35 (4) (c), Stats.), that are granted each year:

January 1

The third Monday in January

The last Monday in May

July 4

The first Monday in September

The fourth Thursday in November

December 24

December 25

December 31

Section 230.35 (4) (a) 10., Stats., states that if the holidays of January 1, July 4, or December 25 fall on a Sunday, the “day following” shall be the paid day off for that holiday. If these days fall on a Saturday or if December 24 or 31 falls on a Saturday or Sunday, the employee will receive 8 hours of vacation leave to use as authorized under Senate policy.

The above paid holidays are automatically entered into CapIO and therefore do not need to be reported by the employee. Please note that part-time employees may need to pro-rate their hours to the appropriate status.

Jury Duty

If called for jury duty, an employee receives full pay without loss of vacation time. Employees should record ‘no hours’ in CapIO and notify LHRO. Remittance of jury pay is not required.

Vacation Leave

Vacation leave (including personal days described below) may be taken with the prior approval of the individual’s appointing authority (i.e., Senator, Chief Clerk, or Sergeant at Arms). An employee who will engage in campaign activities while on vacation leave must notify the Chief Clerk of the use of vacation leave before the leave is taken. See “Time Reporting” on page 9, for further information.

Vacation leave is earned on a monthly basis and must be earned before it is used. Vacation leave is granted as follows, based upon cumulative years of service as a WRS participant in the Legislature or in any state agency:

1-5 years	10.00 hours/month 120 hours/year = 15 days/year
5-10 years	13.34 hours/month 160 hours/year = 20 days/year
10-15 years	14.68 hours/month 176 hours/year = 22 days/year
15-20 years	16.68 hours/month 200 hours/year = 25 days/year
20 + years	18.00 hours/month 216 hours/year = 27 days/year

Vacation for part-time, benefited employees will be prorated at the above rates.

Employees with at least 15 years of service can elect to receive a cash payment for up to 40 hours of vacation leave each year. The LHRO will notify employees when they qualify for this option.

Vacation leave may also be granted if certain paid state holidays fall on a Saturday or Sunday.

Vacation leave may be carried over from one year to the next. However, please note that when an employment relationship is terminated, the employee cannot receive payment for more vacation time than can be earned in one year regardless of their cumulative amount.

If an employee uses more vacation or sick leave than the employee has earned, the unearned balance used will be subtracted from the employee's pay.

Benefited employees are entitled to 4.5 personal days per year (pro-rated for part-time benefited employees). Personal days may be used in lieu of vacation or sick leave but cannot be used for campaign related activities. These personal days are credited immediately upon employment or, for continuing employees, on January 1 of each subsequent year. Personal days must be used in the calendar year in which they were credited—carryover of personal days from year to year is not authorized. Unused vacation and personal time may be paid out upon termination or transferred to the gaining

state agency upon transfer, if the gaining agency so authorizes.

Please note that staff can access their leave balances by clicking on the "Leave Balance" tab in CapIO. However, leave balances are only updated on a monthly basis. This means that any leave time entered into CapIO throughout the month, before payroll closes and processes for that month, will not be reflected on the employee "Leave Balance" tab totals.

Sick Leave

Employees begin to earn sick leave immediately upon employment. 10.84 hours of sick leave accumulate each month, up to a total of 130 hours per year (pro-rated for part-time benefited employees). Senators earn 7.042 hours of sick leave. A Senator's sick leave will accumulate each month, up to a total of 84.50 hours per year. Unused sick leave is accumulated from year to year without limit and without written approval from any appointing authority.

Sick leave may be used for absences for personal injury, illness, parental leave, exposure to contagious disease, for immediate family or personal medical or dental appointments (that cannot be scheduled at times other than during work hours), temporary emergency medical care of ill or injured members of the immediate family, or upon a death in the immediate family of the employee or employee's spouse. Three days of sick leave, plus required travel time not to exceed 4 additional work days, may be used for the funeral of a member of the immediate family. "Immediate family" means:

- Parents, stepparents, grandparents, foster parents, children, stepchildren, grandchildren, foster children, brothers (and their spouses), sisters (and their spouses), of the employee or employee's spouse
- The spouse
- Aunts and uncles, sons-in-law or daughters-in-law of the employee or employee's spouse
- Other relatives of the employee or employee's spouse providing they reside in the same household of the employee. [Wis. Admin. Code ER §18.03]

A Senator who is recorded as absent at a session day, committee meeting or other applicable legislative function, as determined by the Senator, shall notify the Chief Clerk in writing of the need to debit his or her sick leave balance an appropriate amount if the absence was by reason of one of the circumstances described above, and send a copy to LHRO. The LHRO shall maintain copies of notifications in the same manner as other personnel records.

Please note that staff can access their leave balances by clicking on the “Leave Balance” tab in CapIO. However, leave balances are only updated on a monthly basis after monthly payroll processing.

This means that any leave time entered into CapIO throughout the month, before payroll closes and processes for that month, will not be reflected on the employee “Leave Balance” tab totals.

Leave of Absence

A leave of absence and the use of sick and/or vacation leave during such a leave of absence must be approved in advance, in writing, by the appointing authority. The LHRO must provide the employee with the proper leave form, specifying the beginning date and ending date of the leave, the purpose for the leave, and whether the employee is being allowed to use sick and/or vacation leave, or whether the leave is unpaid. Employees may elect to maintain their insurances during a leave of absence for up to three months by prepaying their insurance premiums on their last payroll prior to their leave of absence.

The Legislature will automatically make premium prepayments for the employee unless they decide to cancel the coverage. Please note that there are limitations on timing and re-enrollment. Contact the LHRO to discuss these options.

Employees must make arrangements with the LHRO to extend their insurances beyond the 3 month time period — the employee is responsible for both their share and the state’s share of premiums beyond the initial 3 month period. Upon the commencement of an unpaid leave of absence, the individual is no longer considered an employee of the Senate for the purpose of time reporting or staffing allocations. However, all individuals remain subject to the Wisconsin Code of Ethics and lobbying law during a leave of absence.

Should an outside entity wish to voluntarily reimburse the State of Wisconsin for any or all of these employer costs during the initial 3 month period, they may do so. The outside entity is responsible for making sure that payment is made in a timely fashion. Make the check payable to the State of Wisconsin, put the employee’s name and “benefit state share - LOA” in the memo area and send the check to LHRO, P.O. Box 7882, Madison, WI 53707-7882.

Family and Medical Leave (FMLA)

The Legislature provides family and medical leave in accordance with the provisions of the Federal and Wisconsin Family and Medical Leave Acts. The Federal and Wisconsin Family Medical Leave Acts (FMLA & WFMLA) provide unpaid job-protected family and medical leave to eligible employees (NOTE: the employee may elect to substitute accrued paid leave, including sick leave, vacation time, compensation time, and personal holiday, for unpaid FMLA leave). Leave may be taken in a block of time, or intermittently as the medical condition requires and the laws permit.

FMLA and WFMLA law require that group health benefits be maintained during the protected leave period and that employees are returned to the same (or an equivalent) position at the end of their FMLA leave.

The FMLA leave must be pre-approved, when possible, by the appointing authority, before the leave begins. A form to request FMLA leave is available from the LHRO. Medical proof of necessity for the FMLA leave request may be required. The LHRO should be notified as soon as possible upon return to work.

Senate employees who plan to take family or medical leave as partial absences must provide their proposed leave schedule to the Legislator’s office for which the employee works as follows:

1. In advance of any family leave for birth or adoption.
2. With reasonable promptness after the employee learns of the probable necessity for other family or medical leave.

A. FMLA Employee Eligibility

To be eligible for FMLA leave:

- 1) For Federal FMLA, the employee must have worked for the State of Wisconsin for at least 12 months. (Note: For Federal FMLA, the months do not need to be consecutive, but a break in service cannot exceed 7 years, to be counted for this purpose.) For Wisconsin FMLA, the employee must have worked for the State of Wisconsin for 52 consecutive weeks.
- 2) The employee must have worked for the State of Wisconsin for:
 - a. at least 1,250 hours (not including paid leave) in the 12 months before taking leave, for Federal FMLA, or
 - b. at least 1,000 hours (including paid leave) in the 52 weeks prior to the employee's leave, for Wisconsin FMLA.

B. Qualifying Reasons for Leave

The Federal FMLA requires that eligible employees be granted unpaid leave for the following reasons:

1. Birth of a child and to care for the newborn;
2. Placement of a child for adoption or foster care;
3. Care of an employee's spouse, child, or parent (not parent-in-law) with serious health condition;
4. Includes physical care and psychological comfort and support;
5. Care of a spouse, child, parent, or next of kin who is a service member;
6. The employee's own serious health condition;
7. Any "qualifying exigency" when a spouse, child, parent, or next of kin is a covered military

member on active duty or has been notified of an upcoming call or order to active duty; or,

8. To care for a covered service member with a serious injury or illness, incurred in the line of duty while on active duty (if the employee is the spouse, child, parent, or next of kin of the service member). (Note: This qualifying event allows eligible employees up to 26 weeks of FMLA leave, per calendar year.)

(Note: All of the above Federal FMLA qualifying leave reasons, with the exception of (7), allow eligible employees up to 12 weeks of FMLA leave, per calendar year.)

The Wisconsin FMLA allows employees to take unpaid leave for the following reasons:

1. Birth of a child (Note: This qualifying event allows eligible employees up to 6 weeks of WFMLA leave, per calendar year.);
2. Placement of a child for adoption or a precondition to adoption (but not both). This does not include placement for foster care. (Note: This qualifying event allows eligible employees up to 6 weeks of WFMLA leave, per calendar year.);
3. Care for child, spouse, domestic partner, or parent with a serious health condition, including parent-in-law or domestic partner's parent (Note: This qualifying event allows eligible employees up to 2 weeks of WFMLA leave, per calendar year.); or,
4. The employee's own serious health condition (Note: This qualifying event allows eligible employees up to 2 weeks of WFMLA leave, per calendar year.)

(Note: Federal and Wisconsin leave eligibilities run concurrently.)



Military Leave

Due to the complexity of State and Federal laws regarding military leave, an employee who is ordered to state or federal tours of active duty or are required to be absent from work for annual active duty training, annual field training, or attend military schools should contact the LHRO as soon as possible to review all benefits and pay requirements that apply as a result of the active duty or absence.

Service as an Election Official

An employee may choose to use leave time (excluding sick leave) to serve as an election official. Alternatively, s. 7.33, Stats. allows an employee to serve as an election official without loss of pay for scheduled work hours, including fringe benefits, for the entire 24 hours of each Election Day in which the employee serves in his or her official capacity as an election official. However, if an employee chooses to accept compensation for serving as an election official, the amount of compensation an employee earns for this work during regular work hours must be deducted from the employee's wages, unless the employee uses leave time (excluding sick leave) for those hours. An appointing authority may require an employee who serves as an election official to provide him or her with at least seven days notice of application for a leave authorized under s. 7.33, Stats. The municipal clerk must verify appointments upon request of any appointing authority.

Reasonable Accommodations

The Wisconsin Fair Employment Law (WFEL), the Americans with Disabilities Act as Amended (ADAAA), and the Rehabilitation Act of 1973 (Sections 505 and 508) require employers to take reasonable steps to provide accessibility and to accommodate qualified employees with disabilities when an accommodation is reasonable and required.

A qualified employee with a disability may request a reasonable accommodation to assist them with performing essential job functions, accessing facilities, etc. The Legislature will attempt to accommodate a reasonable accommodation request that is not an undue hardship and is not unduly

costly, extensive, substantial or disruptive, and does not fundamentally alter the nature of the job or the nature or operation of the Legislature.

If an employee would like to request a reasonable accommodation or has questions related to accommodations, please contact the LHRO.

Workers' Compensation

Workers' compensation insurance is required in the state of Wisconsin. It provides benefits for injury or illness as a result of one's employment. This covers not only sudden accidents, but also for injuries that occur over a longer period, such as neck or back injuries. Workers' compensation policies also pay out a death benefit in the event that a death occurs at the workplace.

If an employee suffers an injury/illness, it should be reported to the LHRO within 24 hours of occurrence (or as soon as possible). Once notified, LHRO will send an 'Employee Workplace Injury or Illness Report' form (DOA-6058) to the employee as well as a 'Supervisor and Safety Coordinator Investigation for Injury or Illness' form (DOA-6437) for the appointing authority to complete. These forms need to be returned to the LHRO. The LHRO will provide the appropriate documentation to Risk Management at the Department of Administration (DOA). DOA bases their decisions on the medical evidence provided by attending physicians in the adjudication of claims.

Therefore, medical documentation is required for all workers' compensation claims that involve loss of time and medical care. It is the responsibility of the injured employee to provide this documentation to the LHRO. After the initial documentation has been presented, the employee must provide medical progress updates, until the employee is released to return back to work. Employees will be brought back to work as soon as they are medically able.

Honoring Deceased President

Each Senator may close his or her office on a date designated by the President of the Senate following the death of any United States President in commemoration of the life and public service of that President. Any employees in offices that are

closed shall claim vacation or personal leave time, compensatory time (if granted by the employee's appointing authority), or any combination thereof totaling 8 hours. Additional vacation, compensatory, or personal leave time will not be granted

Nepotism

According to the Wisconsin Ethics Commission, nepotism is prohibited by Wis. Stats. § 19.45(2) of the Ethics Code. This statute, in the Commission's view, prohibits a state public official from using his or her office to bring about the employment by the state of the official's spouse or a dependent relative.

Thus, the Commission suggests a public official should neither: (1) hire as a state employee; nor (2) advocate the hiring or promotion by the state of a person who is the official's spouse, parent, grandparent, grandchild, brother, sister, parent-in-law, grandparent-in-law, brother-in-law, sister-in-law, uncle, aunt, niece, or nephew. The Commission also suggests that an official, in order to avoid appearances of favoritism, not have his/her spouse, dependent relative (dependent as defined by the IRS), or any other of the aforementioned relatives under his/her jurisdiction or supervision.

Pay Period

The normal pay period for employees of the Senate is monthly. All employees are required to submit direct (electronic) deposit account information to the LHRO within 7 days of date of hire. Multiple direct deposits are authorized. Direct deposits are made on the first federal banking day of the month following the pay period. Please note that staff can access their pay stubs/advice statements in PeopleSoft.

Resignations and Terminations

An employee who is terminating employment with the Senate should provide notice as soon as possible to the LHRO. If the employee is benefited, an appointment should be set up with the LHRO to discuss the impact leaving state employment will have on the employee's benefits and other aspects of employment. If a Senator leaves office before the expiration of his or her term, only benefited employees of that office may continue employment

until a successor takes office, unless the employment is terminated by the appropriate party leader (i.e., Majority or Minority Leader). Until a successor takes office, the office is under the supervision of the appropriate party leader (i.e., Majority or Minority Leader).

Severance Pay

When employment is involuntarily terminated, the appointing authority may authorize up to two weeks of pay as a severance benefit. The employee's termination date would be the last day worked, and the employee's CapIO timesheet must be completed through the last day worked. Please note: severance pay in this situation is not WRS eligible. The payment of the severance benefit is charged against the Senator's salary account in the same manner as if the employee were on the payroll. The Senator may fill the position immediately upon termination.

Alternatively, the appointing authority may schedule the termination date up to two months in advance, direct the employee to refrain from coming into work, and authorize the employee to remain on the payroll until the termination date through the use of the employee's accumulated vacation and personal leave.

The employee's termination date would be the last day paid, and the employee's CapIO timesheet would need to be completed reflecting the leave time used. Please note: severance pay in this situation is WRS eligible. The payment of salary during the severance period is charged against the Senator's salary account in the same manner as if the employee were present and working. The Senator may fill the vacancy only after the termination date.



Time Reporting

All hours worked and taken off with pay must be reported on CapIO (<https://capio.wisleg.root.local/Search>).

The CapIO timesheet submitted to the LHRO is the official record of hours of employment. The monthly timesheet must be certified and signed by the employee and the appointing authority, and submitted to the LHRO by the 10th day of each month following the month for which reporting. Electronic approval is acceptable (i.e., e-signature or

approval through CapIO). After the report is printed, any adjustments to time must be noted manually on the printed copy and initialed by the employee (or must be done by emailing the LHRO with the appropriate changes). Timesheets not received by the 15th day of the month following the month for which reporting, may result in the employee's direct deposit being terminated, if applicable. If the 15th falls on a weekend, the deadline will extend to the end of the day on the following Monday. ***A paycheck will not be distributed to any employee who has not submitted a timesheet, or been in contact with the LHRO.***

RULE RELATING TO TIME REPORTING, CAMPAIGN ACTIVITIES, EMPLOYEE PROTECTION, AND CONTINUING ETHICS EDUCATION

A. Reporting Requirements

1. Employees to submit reports.

All employees are required to certify the dates and hours worked, and to certify they did not engage in campaign activity during hours to be compensated by the State.

2. Appointing authority to review and certify.

Each appointing authority shall review such certifications, and countersign certifying that no campaign work was assigned to such employee during hours of employment, and that to the best of the appointing authority's knowledge, information and belief, the employee did not engage in campaign activity during hours of employment.

3. Reports for compensated campaign activity.

All employees are required to notify the Chief Clerk in advance if they will be engaging in campaign activity for which they receive compensation and, if possible, list the dates and hours during which they will be so employed.

B. Standards of Conduct

1. Campaign activity defined. As provided in this rule, the term "campaign activity" means activity that does not reasonably and primarily fulfill and arise from official duties and that contributes to, enhances, or furthers a person's ability to run for, or chance of election or reelection to public office. Illustrative activities include:

- a. Arranging or assisting in arranging a campaign-related event or the raising of campaign contributions.
- b. Soliciting, receiving, or acknowledging campaign contributions.
- c. Preparing or distributing television, radio, newspaper, or other forms of campaign advertisements.

- d. Preparing or designing campaign brochures, literature, nomination papers, or other campaign promotional materials.
- e. Distributing or arranging for the distribution of campaign materials.
- f. Directing, seeking, or coordination of campaign volunteers.
- g. Preparing a campaign budget.
- h. Directing or participating in get-out-the-vote drives.
- i. Creating, maintaining, editing, adding to, or deleting information from a list or database of campaign contributors or supporters.
- j. Creating, maintaining, editing, adding to, or deleting information from a list or database designed or intended for a campaign purpose.
- k. Preparing or coordinating polling operations for a campaign purpose.
- l. Transporting voters to polls or campaign rallies.
- m. Preparing campaign finance reports required by law.
- n. Directing or participating in candidate recruitment.

2. Legislators/supervisors not to assign campaign work. A member or supervisor of legislative employees may not assign, authorize, or request an employee of the Legislature to engage in campaign activity to be performed while the employee is on state time, with the use of state resources, or on state property.

3. Legislative employees not to engage in campaign activity in state offices or on state time.

- a. An employee of the Legislature may not assign or authorize campaign activity to be performed on state time or in state offices.

- b. An employee of the Legislature may not use, or make available for use by another, state property or resources in connection with campaign activity, except as the property or resources are normally available to anyone under similar circumstances.
- c. An employee of the Legislature may not engage in campaign activities:
 - i. During hours of employment claimed;
 - ii. While on any form of paid leave (including “comp” time) other than vacation time and then only after having submitted to the Chief Clerk a request to use vacation time and a finding by the appointing authority that the leave will not be contrary to the interests of that house;
 - iii. During regular hours of employment unless the employee has submitted to the Chief Clerk a request to work variant hours or for unpaid leave and a finding by the appointing authority that such variant hours or unpaid leave will not be contrary to the interests of that house.

C. Employee Protection

It shall be part of an employee’s term of employment that no decision affecting an employee’s continued employment, salary, benefits, or the terms, hours, or other conditions of the individual’s employment may be based in any manner or to any degree on the employee’s failure to participate in campaign activities or failing to make a political contribution.

D. Continuing Education

Each house of the Legislature shall require the attendance of its employees at annual seminars conducted by the Wisconsin Ethics Commission on the standards of conduct and work rules.

The Legislature shall provide resources to obtain the services of experts for faculty from a variety of entities, such as the Wisconsin Ethics Commission, University of Wisconsin, National Conference of State Legislatures, and other recognized individuals. Each new employee

will attend the first seminar offered after the commencement of his or her employment. Each employee shall thereafter attend a seminar at least once every 4 years. Alternative methods shall be developed for providing training on standards of conduct and work rules, to provide opportunities for attendance by those who may be unable to attend scheduled sessions. Failure to attend a seminar or use alternative training methods may result in withholding of compensation.

E. Violation of Rule as Prima Facie Evidence of Violation of s. 19.45(5), Wisconsin Statutes

A member’s or legislative employee’s intentional violation of this rule may be evidence of an unlawful use of state resources.

F. Distribution of Rule

The Chief Clerk shall distribute a copy of this rule to every new employee upon hiring. As a term of employment and eligibility to receive payment of salary or compensation, the employee must provide the Chief Clerk with written acknowledgement of the information’s receipt.



OFFICE AND SALARY ACCOUNTS

Senate Salary Account

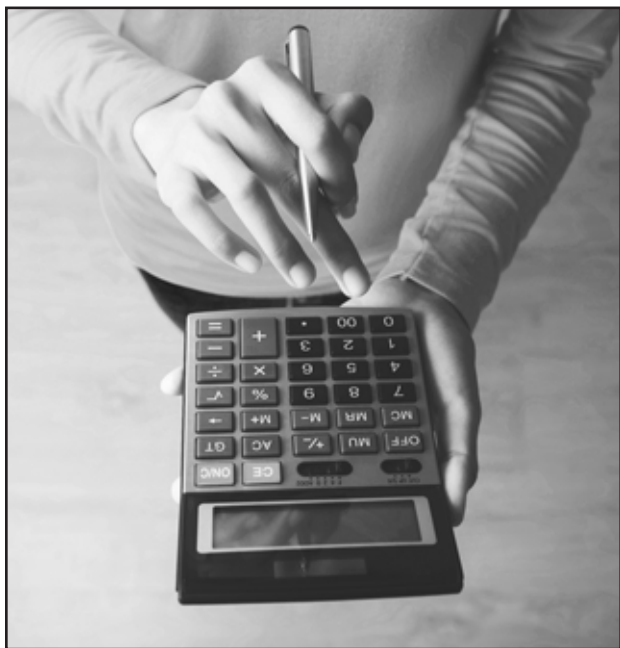
The Senate salary accounts are established at the beginning of the biennium by the Committee on Senate Organization.

Senate Office Expense Account

The total office expense allotment for the 2023-24 biennium is \$55,955 per Senate district. The office expense allotment may be used only as permitted in the Senate Policy Manual.

Salary

Pursuant to the Wisconsin Constitution, a Senator's salary remains the same for the two year legislative session. For the 2023-24 Session of the Wisconsin Legislature, the annual salary is \$57,408.



Senate Leadership Accounts

The following budgetary accounts may be used by the applicable member of Senate leadership during the 2023-24 biennium for any expense that is otherwise permitted to be paid out of the office expense allotment and that, in the opinion of the Senator, is directly related to the Senator's duties as a leader:

Majority Leader	\$12,000
Minority Leader	\$12,000

The Senator must notify the Chief Clerk's office which expenditures should be allocated to the Senator's leadership account. The Senator may direct that amounts be transferred from the leadership account to his or her office expense account.

Allotment Carryover

Senators may not carry forward any portion of the office expense account, leadership account, or salary account allotment into the next legislative session.

Office Expense Account Reimbursements

Reimbursements for any expenses incurred in the current biennium needing to be reimbursed from the office expense account must be submitted to the Chief Clerk's office by the third Wednesday in January of the following biennium in order to be reimbursed. Note that any bills received in January for December services will be paid through February.

POLICIES AND PROCEDURES

Access to Capitol Press Room and Other Press Areas

Accredited correspondents of the news media, who confine themselves to their professional duties, may have access to the Capitol press room and to the press lobby within the Senate Chamber only if they possess a valid, permanent or temporary, registration card issued by the Senate and the card is worn in a visible location. Access to other areas within the Senate Chamber are otherwise prohibited. This policy does not prohibit legislative employees or employees of the DOA, or individuals performing duties under contract with either house of the Legislature or the DOA, from accessing these areas as otherwise authorized. This policy does not limit the authority of the presiding officer to have individuals removed from the Senate Chamber pursuant to Senate Rules.

Additional Employment

Senate staff members are employed for purposes of providing services required in the legislative process. Because of the nature of that process and the occasional extended time demands placed on Senate staff, all Senate staff shall notify the Chief Clerk in advance if they will be engaging in additional employment and, if possible, list the dates and hours during which they will be so employed. See “Time Reporting” policy relating to paid campaign work on page 10.

Addresses to the Senate

Addresses to the Senate are only allowed after prior approval by the Committee on Senate Organization.

Alcoholic Beverages

Senate employees may not consume alcoholic beverages in the Capitol during normal working hours.

Attorney Policy

State law provides for the indemnification of state officers and employees in certain circumstances.

In addition, under the Wisconsin Constitution, the Senate has inherent authority to obtain legal counsel for itself, its members, and its employees. The policies that follow outline the general processes applicable to retention of legal counsel in the Senate.

Defending Against Civil Charges

Obtaining Representation for a Majority Party Senator

If a majority party Senator requires legal representation in a civil legal proceeding, and if in the Majority Leader’s opinion, the acts or allegations underlying the action were arguably within the scope of the Senator’s duties as a Senator, the Majority Leader may direct the Chief Clerk to do one of the following: (1) request representation for the Senator by the Department of Justice; (2) authorize the Senator to obtain outside representation, with the cost of such representation to be paid by the Senate; or, (3) if applicable, reimburse or pay attorney fees and costs already incurred. If the Majority Leader requires legal representation in a civil legal proceeding, the determination concerning scope of duties and the direction to the Chief Clerk shall be made by the President.

Obtaining Representation for a Minority Party Senator

If a minority party Senator requires legal representation in a civil legal proceeding and if in the Minority Leader’s opinion, the acts or allegations underlying the action were arguably within the scope of the Senator’s duties as a Senator, the Minority Leader may direct the Chief Clerk to do one of the following: (1) request representation for the Senator by the Department of Justice; (2) authorize the Senator to obtain outside representation, with the cost of such representation to be paid by the Senate; or, (3) if applicable, reimburse or pay attorney fees and costs already incurred. If the Minority Leader requires legal representation in a civil legal proceeding, the determination concerning scope of duties and the direction to the Chief Clerk shall be made by the Assistant Minority Leader.

Obtaining Representation for an Employee

If a Senate employee requires legal representation in a civil legal proceeding, he or she may contact the Chief Clerk and request representation. Upon receiving such a request, the Chief Clerk may do any of the following: (1) request representation for the employee by the Department of Justice; (2) authorize the employee to obtain outside representation, with the cost of such representation to be paid by the Senate; or, (3) if applicable, reimburse or pay attorney fees and costs already incurred.

If the Chief Clerk refuses to authorize state-paid representation for the employee, because in the Chief Clerk's opinion, the acts or allegations underlying the action were not arguably within the scope of the employee's duties as an employee, the Chief Clerk may not reimburse the employee for or pay any attorney fees or costs. However, if a court, jury, or other duly authorized tribunal makes a finding that the employee was acting within the scope of his or her duties as an employee for all or a portion of the allegations, the Chief Clerk shall reimburse the employee for or pay attorney fees and costs in the matter with regard to that portion of the allegations that were within the scope of the employee's duties.

Other Information

If the Department of Justice provides representation, the Chief Clerk may not reimburse the Senator or employee or pay any other attorney fees or costs. In addition, if the Senator or employee refuses to cooperate in the defense of the litigation, the Senator or employee is not eligible for any indemnification or for the provision of or payment for legal representation.

This policy permits only the payment or reimbursement of reasonable attorney fees and costs. Unless otherwise determined by a court, jury, or other duly authorized tribunal, the Senator or employee determines whether the amount of attorney fees and costs is reasonable.

Defending Against Criminal Charges

If a Senator or employee is a defendant in a criminal prosecution, he or she may obtain outside representation at his or her own expense. If a court, jury, or other duly authorized tribunal determines

that the acts alleged in the complaint were within the scope of the Senator's or employee's duties as a Senator or employee and if the Senator or employee is not convicted of a crime, the Senate will reimburse the Senator or employee for the attorney fees and costs in the matter.

This policy permits only the payment of reasonable attorney fees and costs. Unless otherwise determined by a court, jury, or other duly authorized tribunal, the applicable Senator or employee determines whether the amount of attorney fees and costs is reasonable.

Other Legal Representation of Senators and Employees

Other circumstances may arise in the course of a Senator's or Senate employee's service in the Senate requiring the Senator or employee to obtain legal representation. The Committee on Senate Organization may approve the retention of legal counsel by the Senator or employee and the payment of attorney fees and costs if the committee determines that the need for legal representation arose from the Senator's or employee's performance of his or her duties in the Senate. The Committee on Senate Organization may decide that the underlying facts of the matter do not justify retention of legal counsel or payment by the Senate. If the matter results in criminal charges being filed against the Senator or employee, the Chief Clerk shall stop reimbursing or paying attorney fees and costs in the matter. If the Senator or employee is ultimately found guilty of a crime in the matter, the Senator or employee must repay the Senate for all attorney fees and costs reimbursed or paid by the Senate in the matter. If the matter concerns an investigation, the Senator or employee must sign a statement agreeing to this repayment in advance of any fees or costs being paid by the Senate.

This policy permits only the payment of reasonable attorney fees and costs. Unless otherwise determined by a court or jury, the applicable Senator or employee determines whether the amount of attorney fees and costs is reasonable. In addition, the Senate will not reimburse or pay attorney fees and costs if the Senator or employee is represented by the Department of Justice.

Legal Representation of the Senate

The Committee on Senate Organization may approve the retention of legal counsel and the payment of reasonable attorney fees and costs for purposes of pursuing legal claims on behalf of the Senate and for any other purpose deemed appropriate by the committee.

Audio-Video Technology

LTSB shall assign uniform audio-video equipment and software to the offices of Majority Leader and Minority Leader. Equipment assigned under this provision may be used only by staff of the applicable leader or Senate employees under the direction and supervision of the staff of the applicable leader. Activities for which the Majority Leader's or Minority Leader's equipment may be used primarily include communication of state government information to citizens and constituents.

Equipment assigned under this provision may be used only for activities directly related to the affairs of state government and may not be used for political campaign or personal purposes or for purposes of capturing and using footage in a way that negatively represents any Senator or detracts from the dignity and decorum of the Senate.

Bottled Water Service

Bottled water may be purchased for a Senate office and paid for or reimbursed out of the Senator's office expense account. Contact the Chief Clerk's office for assistance.

Cable TV and Streaming Services in Capitol Offices

Cable TV and streaming services, that are new subscriptions and include live TV, are available to Senate offices solely at the direction of the Senator. To activate either service, contact the Chief Clerk's office to set up an account. The activation, set-up, and monthly programming cost will be charged to the Senator's office expense account.

Campaign Activity

No state facility, office equipment, supplies, etc. may be used for political campaign purposes at any time. See "Time Reporting" policy relating to campaign work on page 10.

Campaign Committee Activity

1. No candidate committee as defined in s. 11.0101(2), Stats., may schedule a fundraising social event in Dane County during a floor period of the Legislature as scheduled by Joint Resolution at the beginning of the legislative session.
2. During the period between the first day authorized for filing nomination papers for any office for which a current member of the Senate is a candidate and the date of the election for that office, that member's personal campaign committee for that election may schedule a fundraising social event during a scheduled floor period within the boundaries of the office for which the current member of the Senate is a candidate, regardless of the restriction in paragraph 1.

Capitol Dome Tours

A Senator may request the Sergeant at Arms office to provide guests a tour of the Capitol Dome by submitting a form prepared by the Sergeant at Arms. The Sergeant at Arms office may conduct a Capitol Dome tour if staffing levels and weather conditions permit.

All guests must submit a signed waiver form prepared by the Sergeant at Arms prior to participating in a Capitol Dome tour. A guest under 18 years old must have a parent or guardian sign the waiver form. All guests must be at least 16 years old.

Capitol Police and Emergency Evacuations

General Information

Fire or Medical (Emergency Personnel)	911
Capitol Police (Emergency)	6-7700
Capitol Police (Non-emergency)	6-8797

Please refer to the Capitol Safety and Security Guidelines Manual for all issues related to emergency procedures. A copy of this manual will be provided to each employee and can also be found online at the Sergeant at Arms' website.

Caucus Meetings

The corridors and areas immediately outside of the respective partisan caucus rooms shall be kept clear at all times during caucus meetings. Access to the caucus meetings that are open to the public is limited to space available in the room. During periods of closed caucus, loitering in the areas adjacent to the meeting rooms is prohibited.

Citations

Citations may be obtained as provided under Senate Rule 98 and Joint Rule 7. The proposed content of citations should be sent electronically to the Chief Clerk's office. If a citation is placed on a plaque or in a cover folder, the cost will be charged to the Senator's office expense account. A minimum of five business days should be allowed for any citation.

Communications Activities

Legislative staff is prohibited from:

- a. In the case of an audio/video clip that contains a reference to or depiction of an elected state official who becomes a candidate for national, state, or local office, disseminating the audio/video clip in any way after the first day authorized by law for circulation of nomination papers as a candidate for that office. This policy does not require clips previously posted to a legislative website to be removed and does not prohibit communications authorized under s. 11.1205 (2), Stats.

- b. In the case of an audio/video clip that contains the recorded voice or image of an elected state official other than the staff person's appointing authority, disseminating the audio/video clip without the written authorization of that elected state official. It is not a violation of this policy; however, to prepare or disseminate an audio/video clip that includes such a recorded voice or image only as background due to the camera angle or microphone placement from which the original audio and video were acquired.

It is the responsibility of each legislator to ensure that all audio/visual clips prepared and disseminated at his or her request are in compliance with this policy.

Computer Equipment

Computer equipment is provided and supported by LTSB. Assigned computer distribution is as follows in the Senate:

- All 33 Senators get a laptop with docking station. A Senator that chooses a laptop with Wi-Fi paid for by the senate will not be eligible for reimbursement of their home internet.
- The following members of leadership get one extra laptop:
 - Senate President
 - President Pro Tem
 - Majority Leader
 - Assistant Majority Leader
 - Majority Caucus Chair
 - Majority Caucus Vice Chair
 - Co-Chair of the JFC
 - Minority Leader
 - Assistant Minority Leader
 - Minority Caucus Chair
 - Minority Caucus Vice Chair
- All Senate full-time staff get one desktop computer; Each Senate office also has the option of two additional desktop computers for LTE or intern use. Only Senate-issued computers, equipment, and programs are supported by LTSB. Senate leadership may assign additional computers to offices as needed upon availability.



Computer Usage

No Expectation of Privacy

The Wisconsin State Legislature’s electronic mail system, assigned computer workstations and laptops, computer network, and Internet services (hereinafter referred to as “computer system”) are powerful communication and productivity tools. Employees and Senators may use the computer system for Senate business. In addition, as a benefit of employment, the Senate allows each Senator and employee to engage in limited personal use of the computer system, provided the use does not impinge upon the completion of his or her job duties and is consistent with the policies below. In addition to providing a quality work environment for Senators and employees, allowing this limited personal use will help ensure that Senators and employees are proficient in the use of these communication and productivity tools.

While using the computer system, a Senator or employee is acting as a representative of the Senate and an employee is acting as a representative of his or her appointing authority. As such, Senators and employees should act accordingly so as not to damage the reputation of the institution. Employees and Senators may not use the computer system to communicate under a hidden, false, or alternate identity.

United States copyright and patent laws protect the interests of authors and software developers in their products. It is against federal law and Senate policy

to violate the copyrights or patents of others on or through the Internet. Any infringing activity by an employee or Senator may be the responsibility of the Senate. Therefore, the Senate may choose to hold the Senator or employee liable for his or her actions.

Employees and Senators may not use the computer system to promote their personal business interests, engage in discrimination or sexual harassment, engage in political campaign activity, engage in any unlawful activity, intentionally access or facilitate access to pornographic material, send mass mailings (except mass mailings that are approved by the Senator), play computer games, gamble, or obtain personal gain.

Violations of these usage policies by an employee may result in discipline, up to and including termination.

Internet usage by individual users is generally not tracked, except as may be provided in the Internet browser’s history file on the user’s local hard drive. However, any information associated with use of the computer system may be monitored, tracked or accessed at any time by the user’s appointing authority or, with the appointing authority’s consent, by the Chief Clerk. Users should have no expectation of personal privacy with regard to any information associated with their use of the computer system. LTSB may facilitate any authorized monitoring, tracking, or access under this policy only upon request of the user’s appointing authority.

Please note that, although users should have no expectation of personal privacy with regard to their usage of the computer system, certain information

may not be subject to disclosure under the Wisconsin Open Records Law. For example, under case law, certain personal emails are not subject to public inspection under the Wisconsin Open Records Law. Offices that receive a request for access to electronic records under the Wisconsin Open Records Law should contact the Chief Clerk.

Please refer to “Guidelines Regarding Legislator and Legislative Staff Use of State-Supported Websites and Social Media Technology” in **Appendix III** for additional information.

TikTok

LTSB blocks access to the TikTok website (www.tiktok.com) and the TikTok desktop application on LTSB-issued computers and any computer/device (LTSB-issued or personal) connected to VPN. Senators and staff are also prohibited from accessing TikTok on any computer/device issued by the Senate (e.g., cell phones). A Senator or staff person may access TikTok on a personal computer/device as long as they are not connected to the Legislature’s VPN.

Electronics in the Senate Chamber

Unless otherwise allowed in the Senate Rules, electronics may not be used in the Senate Chamber during session, except:

- (a) By individuals working in the area reserved for the press who possess a valid, permanent, or temporary registration card issued by the Senate
- (b) By Senate staff
- (c) By any Senator
- (d) By all service agency staff (i.e., LAB, LC, LFB, LRB & LTSB) staff.

The allowed use of electronics shall be permitted in the Senate Chamber only on silent mode and shall be limited to legislative business when at all possible. Electronic devices shall only be used in a manner as to not be disruptive to the Senate, as determined by the presiding officer.

This policy does not limit the authority of the presiding officer to maintain order in the Chamber.

Copies and Distributions

The Sergeant at Arms office is available to make copies and scan documents for official legislative business. All incoming distributions for the Senate floor should be taken to the Sergeant at Arms. Distributions on the floor are allowed only if the subject matter pertains to a matter on the floor calendar. Senators may have distributions handed out on the floor if it is on their letterhead. Any distribution for an outside organization needs to have 40 copies and one copy needs a signature from the sponsoring Senator.

All outside mail needs to go through the legislative mailroom. Mail may be dropped off at the Sergeant at Arms’ office, B35 South. For mail to go through the legislative mailroom it must have 34 copies, contact information on each piece of mail, and does not solicit funds.

Dignitaries

The Senate recognizes that it is customary in many cultures for dignitaries to exchange small gifts upon meeting in their official capacities. If funds are available, the Chief Clerk shall allocate money within the Senate budget to purchase appropriate gifts for this purpose. Any member of the Committee on Senate Organization who receives a visiting dignitary in the Senate or who visits a dignitary on behalf of the Senate may obtain an appropriate gift from the Chief Clerk’s office to present to the dignitary on behalf of the Senate. Any other Senator, if assigned by the Committee on Senate Organization to represent the Senate in the context of the visit, may likewise obtain an appropriate gift from the Chief Clerk’s office to present to the dignitary on behalf of the Senate. In either case, the cost of the gift is not charged to the Senator’s office expense account. In all other cases, a Senator may obtain an appropriate gift from the Chief Clerk’s office to present to dignitaries in their capacity as a Senator and the cost of the gifts is charged against the Senator’s office expense account.

District Office

Rental of space for district offices is permitted with the Chief Clerk’s prior approval of the lease agreement. A Senator’s district office must be located within the Senator’s district. Lease agreements are between the

Senator and the lessor. Senators may not rent district offices from themselves, businesses with which they are associated, or members of their immediate family. Senators shall arrange rental agreements for a maximum of the biennium or the duration of their term, whichever is less. The Senate shall pay rent directly to each landlord or provider of services. Rent is charged to the office expense account of the applicable Senator. Liability coverage is provided in accordance with the State Risk Management Self-Insurance Fund.

Senate rules that outline campaign activity also apply to district offices.

Door Lettering

Information pertaining to a Senator may be lettered on the door free of charge. Contact the Sergeant at Arms office for this service.

Flags

Wisconsin state flags and United States of America flags are available through the Chief Clerk's office. Office accounts may be used to purchase a flag for distribution to the public. Checks are payable to the "State of Wisconsin." At the Senator's request, flags will be flown over the Wisconsin State Capitol, and a certificate will be issued and signed by the Chief Clerk for each flag flown. Contact the Chief Clerk's office or check their website at: <https://legis.wisconsin.gov/senate/scc/> for the current price of flags.

Furniture and Office Equipment

All furniture and office equipment in use in the Senate, other than storage boxes and other personal property of Senators and staff, is the property of the state. The Chief Clerk maintains an inventory of such furniture and non-standard hardware equipment. Computer equipment and telephones are provided and supported by LTSB.

Furniture in the Senate was designed for specific offices within the Capitol. As a result, when a Senator moves to a new office, he or she generally receives the furniture located in the new office. All furniture, telephone, computers, and facsimile machine moves must be authorized and coordinated by the Chief

Clerk's office. LTSB will coordinate the computer equipment moves with the Chief Clerk's office. At the conclusion of each legislative biennium, the Chief Clerk shall "true up" the furniture, telephone, and facsimile inventory and note any missing or damaged furniture or equipment.

The Senate may purchase ergonomic equipment for Senators and staff if the cost is less than \$500. Any such equipment will remain in the Senate inventory and will not be charged to the office account. Purchases costing over \$500 must be pre-approved by the Committee on Senate Organization.

If funds are available, the Chief Clerk shall allocate a portion of the Senate budget for repairing damaged furniture, and purchasing or replacing if necessary.

The Chief Clerk shall allocate a portion of the Senate budget to purchase one storage (plunder) box per biennium for each freshman Senator.

Gifts (Accepting Items From Lobbyists)

Generally, Senate employees may not accept anything of pecuniary value from a lobbyist, a lobbyist's employee, or a person that employs a lobbyist (principal). There are certain limited exceptions to this policy, consistent with the state's lobbying law and code of ethics for public officials. Please refer to the Wisconsin Ethics Commission guidelines for more information, which may be found here: <http://ethics.wi.gov/content/conduct-standards>. For any further questions or concerns, contact the Chief Clerk.

Hearing Impaired

The Wisconsin Telecommunications Relay System (WTRS) is a telephone system designed to give persons with hearing and/or speech disabilities "functionally equivalent" access to the telephone network. WTRS relays telephone conversations between persons using a text telephone (TTY) and persons using a conventional telephone through a communication assistant (CA). The CA relays the hearing person's exact words by typing back to the TTY user. All CAs have been trained to help conversations flow with ease, accuracy, and confidentiality. The FCC has designated 711 exclusively for telecommunications relay service.

Simply dial 711 and an operator will request the number you are calling and place the call. For additional information, please visit <http://www.wisconsinrelay.com/>.

Sign language interpreters have limited availability. When reasonable notice is provided, the Chief Clerk's staff will attempt to provide sign language interpreters for legislative hearings and/or constituent meetings.

The Senate Chambers and 411 South have hearing assistance devices that are available upon request.

Information Technology

Contact LTSB at **267-9528** with all questions or concerns regarding computer software, hardware, and printers. Printer toner, CDs, DVDs, flash drives, and labels are available through the Chief Clerk's office. These items, with the exception of toner (for Senate-leased equipment), are charged to the Senator's office expense account. The Senator's office expense account may not be used to purchase IT equipment or software unless approved by the Senate Chief Clerk. The Committee on Senate Organization must preapprove IT equipment that costs over \$500 and software costs over \$300. No office supplies may be reimbursed without prior approval. The Senate forbids the illegal duplication of licensed software. Senators and staff may request non-standard IT

equipment or software by sending a message to the Chief Clerk through *Anchor*, the Senate's intranet site: <https://senate.wisleg.root.local> (click the Technology icon and select "Hardware/Software Request") this message may include a link to the requested item and must include a description of the business purpose for the requested item.

For standard hardware and software that LTSB can manage and support (such as *Chrome*, *ComClerk*, etc.), please contact LTSB.

If a technical issue arises in a Senator's home and/or district office with legislative supplied hardware or software, the district office should contact LTSB for technical support. LTSB and the office will first attempt to resolve the issue remotely. If the issue cannot be resolved remotely, then the district office, the Chief Clerk's office, and the LTSB will coordinate one of the following options: (1) the Senate district office staff member may bring the affected equipment to LTSB for support; (2) LTSB may visit the district office to provide support; (3) upon rare occasion, LTSB, the district office, and the Chief Clerk's office may agree to contract with a non-legislative service provider to visit the district office to assist with resolution. Any contracts and costs associated with option 3 will be managed by the Senate Chief Clerk's Office.



Legislative Account Security

Cyber security threats continue to increase for individuals and institutions, creating a risk of damage to public image, interruption of business, data theft, stolen identities, and significant financial impacts. To protect the Wisconsin Legislature, LTSB uses spam blocking technology, virus protection, firewalls, and strong security practices in its management of legislative computer systems.

The current password policy for all legislators and legislative employees is the following:

- All passwords expire after 180 days.
- The minimum password length is 10 characters.
- A password must contain at least one character from at least three of the following four categories:
 - Uppercase characters (A through Z).
 - Lowercase characters (a through z).
 - Digits 0 through 9.
 - Special characters (such as ` ~ ! @ # \$ % ^ & * () _ + - = { } | \ : " ; ' < > ? , . / and space).

Additional information about computer security practices is available at:

<https://cybersecurity.legis.wisconsin.gov/>.

If you have any questions, please contact LTSB Technical Services at **267-9528**.

Keys and Access Cards

The Sergeant at Arms' office is responsible for the issuance of all keys and access cards. All full-time employees are issued office and hallway keys and an access card that provides 24-hour access to the Capitol. Any lost or stolen keys or access cards require immediate notification of the Sergeant's office. A person may be charged a \$200 fee for any lost keys and a \$50 fee for any lost access cards. These fees may be deducted from an employee's paycheck.

A staff person who has not been issued a key may not access a Senate office without another staff person present unless the person has specific authorization. A Senate office may grant this authorization by completing a form prepared by the Senate Sergeant at Arms. This form may be accessed on Anchor, the Senate intranet site.

Media Access for the Wisconsin State Legislature

The Wisconsin State Legislature has established a process for members of the media to apply for Legislative credentials to gain access to the floor during legislative sessions of the Assembly and Senate for the 2023-24 legislative session. The recommendations for credentialing media put forth by the Wisconsin Capitol Correspondents Board (WCCB) are used to determine who receives credentials.

WCCB recommends that the applicant is or represents an organization whose core function is gathering news in one of the following categories:

- Newspapers of general circulation, including college student publications.
- Wire services that routinely have material published on a regular basis.
- Paid, subscription-based information services published on a regular basis.
- Radio stations.
- Radio networks.
- Television stations.
- Cable television stations offering public affairs programming.
- Magazines of general interest.
- Photo service companies or paid stringers working on behalf of a qualified organization.
- Online news services.

The credentials issued for use in the Legislature are not to be used outside of these entities. Journalists must only submit materials for the media outlet for which they seek credentialing. The Senate and/or Assembly can revoke and/or remove credentials at any time. All credentialed members of the media are representing their organization. Each house has their respective rules that govern conduct in their Chambers. (Chapter 2 in the Senate outlines Order and Decorum and Rule 26 in the Assembly outlines Conduct in the Chamber.)

Members of the media granted access to either Chamber are expected to abide by the rules and expectations laid out by the body. In addition, the

WCCB's recommendations on Conduct and Ethics (as outlined below) are to be followed.

All registrants must abide by the rules of the applicable legislative chamber, which includes the following. Registrants shall not act as an agent in the prosecution of claims, become engaged or assist, direct or indirectly, in any lobbying, promotion, advertising, or public activity intended to influence legislation or any other action of the Legislature, nor any matter before any independent agency, or any department or instrumentality of the Governor's office.

All registrants shall hold the highest journalism standards, including:

- Avoid conflicts of interest, real or perceived.
- Remain free of associations and activities that may compromise integrity or damage credibility.
- Refuse gifts, favors, fees, and special treatment, and shun secondary employment, political involvement, public office and service in community organization if they compromise journalistic integrity.
- Deny favored treatment to advertisers and special interests and resist their pressure to influence news coverage.

A violation of these rules may result in the revocation of a credential or a denial of an application.

Proof of employment (business card, company photo I.D., or letter with media outlet letterhead) must be attached at the time of application. Credentials must be submitted 24 hours in advance for special events (such as State of the State, Budget Address, and Inauguration). Please submit all other requests for credentials by 5 p.m. the day prior to a legislative session day; any request made after that time may be subject to a delay. Sessional credentials are good for all legislative days including the special legislative events held during a floor session.

*Appeals can be made in writing to the Joint Committee on Legislative Organization (JCLO). Please send appeals to the JCLO chairs. Confirmation of receipt of appeal will be issued in writing by the offices of the JCLO chairs. If the committee does not act on the appeal within 30 days of confirmation, the initial judgment will stand.

Seating for credentialed media is available on a first-come, first-serve basis. The Senate Parlor and vestibule is not available to members of the media.

Still camera and video photographers should remain in designated areas. Photos and videos are not to be taken from the vestibule, parlor or any other non-designated press areas.

The full written policy and media credentialing process is available at <http://presscredentials.legis.wisconsin.gov/>.

Membership Dues/ Registration Fees

At the request of a Senator, the Senate will pay membership dues for the American Legislative Exchange Council (ALEC), National Organization of Black Elected Legislative/Women (NOBEL/WOMEN), Wisconsin Women in Government, and chambers of commerce within the Senator's district. The Senate will pay membership dues for the Chief Clerk, Sergeant at Arms, and their staffs, for membership in their respective professional organizations. All other dues payments on behalf of an individual Senator or staff person are prohibited unless approved by the Senate Chief Clerk. Committee on Senate Organization must preapprove any dues that cost over \$200.

Miscellaneous Expenditures

Any proposed expenditure on behalf of a Senator that is not specifically authorized under Senate policy must be approved by the Committee on Senate Organization as directly related to the affairs of state government prior to payment by the Chief Clerk.

Newspapers, Periodicals, and Other Publications

Senators may subscribe to or purchase newspapers, periodicals and other publications if, in the opinion of the Senator, the purchase is directly related to the affairs of state government. For district-based publications, Senate staff should contact the subscription office directly. For publications outside the district, contact the Chief Clerk's office. All statements for newspapers and periodicals must include the Senator's name. These statements should

be sent to the Chief Clerk’s office for payment and deduction from the Senator’s office expense account.

Major newspapers are available to Senate offices via delivery by the Sergeant at Arms’ staff. Senators may authorize subscriptions, not to exceed the Senator’s term of office. Costs are charged to the Senator’s office expense account.

Certain publications, both printed and on-line, require membership or registration in order to subscribe. Costs of such memberships and registrations may be paid from the Senator’s office expense account.

Office Access

The Chief Clerk’s and Sergeant at Arms’ offices may access any Senate office, whether staff are present or not, when performing official Senate business (e.g., delivering newspapers, mail, or messages).

Office Walls and Windows

If a Senator desires to hang an item on the walls of his or her office, the Senator must contact the Sergeant’s office to facilitate the use of a proper mounting device consistent with policies of the State Capitol and Executive Residence Board. Generally, items are mounted by DOA using the picture rail.

Senate office windows and patios must be kept clear of any obstructions. In addition, nothing may be mounted or affixed to Senate office windows. Any unauthorized material shall be removed and disposed of by the DOA in accordance with Adm 2.07.

Opening Prayer for Session

The Senate invites anyone, regardless of their religious beliefs, to give the opening prayer of a session day, and does not discriminate against any member, staff, or visitor on the basis of their participation or non-participation in the opening prayer.

If a Senator would like to arrange for an individual to deliver the opening prayer for session, the Senator shall write a letter to the Senate President indicating the name and address of the individual and the date on which the Senator requests the prayer to be offered. The Senator should provide a copy of the letter to the Chief Clerk. Once the President approves

of the request, the President notifies the Chief Clerk and the Senator, and mails the guidelines and parking information. The guidelines shall indicate all of the following:

- That the prayer should be approximately two to three minutes in length.
- That the prayer should be respectful of those who may hold different religious beliefs, and prohibits prayers that intentionally proselytize or disparage any person, religion, or religious sect.
- That the prayer should avoid contentious subject matter and should not be political.

In addition, the President shall notify the individual that parking may be arranged by contacting the Sergeant at Arms 24 hours before the scheduled floor session.

Package Express

Package express services are available. Contact the office of the Sergeant at Arms for additional information. All package express costs are charged to the Senator’s office expense account.

Parking Spaces

Payment for parking is made through a monthly payroll deduction.

Parking spaces allotted to the Senate are distributed as follows:

OFFICE	SPACES ALLOTTED
Majority Leader	5
Minority Leader	5
President	4
Co-Chair of JFC	4
Assistant Majority Leader	3
JFC Members	3
Senator	2

The Sergeant at Arms office facilitates the process of distributing and reclaiming unused spaces. Each office controls the use of parking spaces allotted to it. If an office will not use all of its allotted spaces, they should notify the Sergeant at Arms immediately. These unused spaces will be made available only to Senators that are not in leadership positions, based

upon seniority. The office that initially chose to make the space available may reclaim each unused space at any time.

Personal Property Liability

The Wisconsin State Senate is not responsible for loss, theft, or damage of personal items brought by employees to the office.

Photos

The Legislature has two photographers available for school groups, meet and greets, press conferences, and any other legislative event in either house of the Legislature. The phone numbers to schedule a photography appointment are 261-9476 and 267-0897.

Photocopying

The Sergeant at Arms office maintains the equipment and will assign one account number to each office that can be used on all Senate photocopying equipment. Contact the Sergeant at Arms office for special projects that require large numbers of copies.

Poll Lists, Professional Lists, and Other Lists

The office of the Chief Clerk does not house or process list data. The single source for list processing and list data is LTSB. Please make your requests by calling the LTSB Technical Support at **267-9528**.

Statewide or Multi-District Lists

The Wisconsin Elections Commission maintains the Statewide Voter Registration System which is Wisconsin's official list of registered voters. It contains voter id, name, address, county, municipality, ward, year of birth, sex, and elections voted. LTSB obtains this list after each election once the Wisconsin Elections Commission is prepared to release it. The cost of the list is split between the Senate and Assembly. Once received, LTSB standardizes and geocodes the addresses adding Assembly and Senate districts. Offices may request the raw data or have it added to their Forward database by LTSB for use in the conduct of legislative business.

The Chief Clerk may provide LTSB with funds to purchase other statewide lists commonly used in the Senate for use by all Senators and non-partisan legislative agencies in the conduct of legislative business. Senators may purchase lists applicable to their districts for the purpose of distributing communications that are directly related to the affairs of state government. For any such list, the list's cost is charged to the Senator's office expense account.

If authorized as a valid state expenditure by the Committee on Senate Organization, a Senator may purchase a list that covers more than one district. A copy of any such list shall be retained at LTSB until at least the end of the biennium in which it was purchased.

Polling and Robocalls

A Senator may contract to have a telephone poll or robocall conducted within the boundaries of his or her Senate district. The Committee on Senate Organization must approve all contracts as valid state expenditures. The statement to be used by the pollsters and questions to be asked must be filed with the Chief Clerk prior to approval of the contract. Costs for such polling shall be charged to the Senator's office expense account. However, polling by candidates for re-election or election to another office may not be conducted after the candidate is eligible to circulate nomination papers.

Purchasing

All Senate purchases, except lease agreements for district offices, are made through the Chief Clerk's office. Senate purchasing and procurement is governed by s. 16.74, Stats. The Chief Clerk or his or her designee shall sign all necessary contracts and requisitions.

Purchases of less than \$10,000 may be made from any vendor who, in the opinion of the Chief Clerk or the Senator requesting the purchase, is able to supply the requested goods or services in a timely manner.

Purchases of \$10,000 to \$24,999 shall be made only after the Chief Clerk has solicited bid quotes from at least three vendors. The bid quotes may be from published list prices, verbal quotes, or written quotes. Contracts shall be awarded in response to solicitation



of bid quotes to the bidder who, in the opinion of the Chief Clerk, is the lowest responsible bidder meeting the specifications. Cost is not the sole determining factor.

Purchases of \$25,000 or more, other than postage, shall be made only after the Committee on Senate Organization, or the chairperson, has approved the purchase and the Chief Clerk has solicited written responses to a request for proposals. Contracts shall be awarded in response to a request for proposals to the bidder who, in the opinion of the Committee on Senate Organization, or the chairperson, is the lowest responsible bidder meeting the specifications. Cost is not the sole determining factor.

Requirements for solicitation of bids or requests for proposals do not apply if the product or service is available from only one source, if the product or service is purchased off of a state contract, an emergency exists such that time would not permit solicitation of bids, substantial time pressure beyond the control of the Chief Clerk exists to obtain the product or service, the purchase is for legal services, or the intrinsic value of the product or service is determined by its historic, artistic, or educational value.

In the case of a good or service that is jointly purchased with the Assembly or another agency, the amount of the total purchase that will be paid by the Senate is the amount that determines which of the above requirements applies.

This policy does not prohibit the Chief Clerk from requesting that a particular purchase be made through the Department of Administration, in which case the Department of Administration would be

responsible for following procurement laws that are applicable to executive branch agencies.

Lease agreements for district office space are not subject to the requirements above. They are governed by the “District Office” section on page 18.

Contracts for the Senate Purchases

In addition to the Chief Clerk, the Majority Leader is designated by the Committee on Senate Organization, pursuant to s. 16.74 (2) (b), Stats., to sign all contracts for the purchase of supplies, materials, equipment, and permanent personal property, and for all contractual services required for use by the Senate.

Contract Sunshine

Wis. Stat. § 19.48(11) requires the Wisconsin Ethics Commission to “maintain an internet site on which the information required to be posted by agencies under Wis. Stat. § 16.753(4) can be posted and accessed. The information on the site shall be accessible directly or by linkage from a single page on the internet.” This information has historically been available at <http://sunshine.wi.gov/>. Since the enactment of the Wisconsin Contract Sunshine Act, other sites maintained by the State of Wisconsin provide the vast majority of the required information. Those sites are:

- Vendor Net: <https://vendornet.wi.gov/>
- Public Notices: <http://publicnotices.wi.gov>, and
- Open Book Wisconsin: <http://openbook.wi.gov/>

If state agencies notify Ethics Commission staff of information they believe is required to be posted under Wis. Stat. § 16.753(4), but that is not displayed on any other site, that information will be posted on this website here.

Agencies can report information to contract.sunshine@wi.gov using this form: [contract_sunshine_agency_reporting_form.xlsx](#).



Printing and Communications

Materials to be Directly Related to the Affairs of State Government. All printing and communication designed by the Chief Clerk’s office, Senate staff, or at the direction of a Senator, must be directly related to the affairs of state government. The Chief Clerk reviews the content of all printing and other communications that are designed by the Chief Clerk’s office in an effort to help ensure compliance with this policy. While the Chief Clerk provides advice in this regard, it is ultimately the responsibility of each Senator to ensure that the content of all printing and communications designed or distributed at his or her request are directly related to the affairs of state government.

The Chief Clerk’s office shall provide design and printing services on behalf of Senators only for the following printing and communications, all of which are directly related to the affairs of state government:

- Advertisements for listening sessions or similar meetings to discuss public policy issues, current laws and regulations, or other state government issues.
- Advertisements for educational seminars that are coordinated with executive branch or federal government agencies and at which attendees will learn about a specific regulated activity and the applicable governmental regulations.
- Communications that discuss a Senator’s legislative agenda, legislative achievements, constituent service, or legislative office; activities of the Senate; district community activities or information;

current laws or regulations; public policy issues under debate; or other state government issues.

- Photographic portraits or other photographs depicting a Senator engaging in Wisconsin legislative activities, activities related to his or her duties as a Senator, or activities in his or her district (provided they are not political campaign-related).
- Maps showing the state or a Senator’s district.
- “Saw you in the news,” school group photograph templates, and similar items.
- Citations authorized under Senate rules.
- Commemorative resolutions.
- Senate office stationery and like materials.
- Surveys relating to public policy issues, the activities of the Senate, current laws or regulations, other state government issues, or the performance of public officials.

Election Campaign Season Restrictions. The following policies are likewise intended to ensure that Senate printing and communications are not designed or distributed for a political campaign purpose:

- If a Senator is up for reelection and he or she distributes a mass-mailing between January 1 and April 14 of the year of the election, they may invite individuals to obtain free publications from the Senator (e.g., Blue Books and maps). The office may provide those publications up to April 15. After April 15, they may only provide up to 49 pieces of each item. Once that limit has been reached, the Chief Clerk shall fulfill such requests

without a label or other information identifying the item as being provided by the Senator.

- After the date on which nomination papers may be circulated for a public office, no Senator may distribute a mass-mailing or similar communication within the jurisdiction of that public office that prominently contains the image of, discusses the individual achievements of, or specifically criticizes another individual who holds that public office, or who has announced a candidacy for that public office or another public office within the jurisdiction of that public office. For example, none of the three Assembly members' pictures may be prominently displayed or be mentioned in a mailing whose districts resides within the jurisdiction of that Senate district, whether or not that Senator is up for re-election. Exceptions are school group pictures and bill signing ceremonies if the Assembly member is not named.
- No Senator who becomes a candidate for national, state, or local office may use Senate funds to produce or distribute 50 or more pieces of substantially identical material after the first day for circulation of nomination papers, unless an exception to s. 11.1205, Stats., applies. An electronic copy of a document counts as a single copy for the purpose of determining the total distributed. A copy posted to a web page counts as a single copy for purposes of determining the total distributed. Senators who are subject to this limitation may forward requests for free publications to the Chief Clerk's office. The Chief Clerk shall fulfill such requests without a label or other information identifying the item as being provided by the Senator. Exceptions to this policy are "Saw You in the News" correspondence, as they are for different people, different dates, and different events. These are not considered substantially similar to each other for this purpose; and school group photos of a single school or classroom even if the total number of students and teacher equal 50 or more, as this is only considered one class.

Advertisement Communication. A Senator may purchase services to promote listening sessions or similar meetings within the district to discuss public policy issues, current laws and regulations, or other state government issues. Examples of such

services include, but are not limited to, the use of telemarketing services, print advertising, etc.

Decorum in Senate Publications. All printing and other communications that are designed or distributed at the request of a Senator must conform to the Senate's rules and customs of debate in the same manner as if the Senate were sitting in session.

Distributions to be Made in District. A Senator may not distribute postal patron mailings outside of his or her district. It is acceptable for a minimal number of copies to be distributed outside the district due to postal routes.

Methods of Distributing Hard Copies. Hard copies of communications may be distributed as follows:

1. By hand by a Senator, the Senator's staff, the staff of another Senator, or volunteers.
2. Via the United States Postal Service, after processing by the Sergeant at Arms' staff.
3. Via the United States Postal Service, after processing by an independent contractor, provided the use of the contractor is more cost-effective or timely.
4. Via insert in local publications.

All contracts for distribution shall be arranged via the Chief Clerk's office and are subject to applicable policies concerning procurement. In addition, please see the "Alternative to State Contract Printer or Senate Mail Distribution" policy below.

Office Expense Account. Printing and communications expenses are charged to a Senator's office expense account.

General Printing Procedure. The following procedures are recommended when a Senator requests printing:

1. Notify the Chief Clerk's Print Coordinator of the request for printing.
2. Request the mailing list from LTSB. Determine mail universe (i.e., individual name and addresses, residential customer, or postal customer). Final list to be sent to Mail Coordinator and Print Coordinator.
3. Contact a Graphic Designer in the Chief Clerk's office for design layout assistance. Paper costs can vary greatly depending on design layout.

Every consideration should be given to using the most economical layout.

4. After the design layout is completed, the Graphic Designer will contact the Print Coordinator for a printing requisition. The printing requisition will include all the necessary information to be approved by the Chief Clerk.
5. Printing time, from requisition to delivery, is an estimated maximum of 13 working days. Re-run orders take approximately 10 working days.
6. The Print Coordinator is responsible for all printing-related correspondence and communication with state contract printers.
7. Senate staff using an outside bid printer must coordinate such efforts with the Print Coordinator. A state purchase order approved by the Chief Clerk must accompany all printing orders with a non-state contract printer. Section 35.05 (5) (e), Stats., provides that no identification of the printer may appear on printed material paid for by the State of Wisconsin. Legislative printing may include the words “printed with union labor.”
8. Business cards for staff may be printed on in-house laser printers for a minimal charge to the Senator’s office expense account. The Chief Clerk’s office has a program for business card design. Contact a Graphic Designer for this service.

Alternative to State Contract Printer or Senate Mail Distribution. All pertinent information must be determined before a valid bid can be obtained from a state contract printer or a non-state contract printer. The Print Coordinator is responsible for completion of the off-contract printer’s bid forms. The bid submitted by an off-contract printer must be the same as, or lower than, the state contract printer, inclusive of fees and charges (i.e., delivery).

In addition, if the print job is for a Senator who is up for reelection and if the print job is to take place in April of an even-numbered year and the distribution will not be coordinated by the Chief Clerk’s office, the printer and/or independent contractor processing the distribution must provide the Chief Clerk’s office with a letter indicating that the publication will be printed and distributed prior to April 15. If the distribution is

via the United States Postal Service, an official signed stamped copy of PS Form 3602-R1 shall be provided to the Chief Clerk indicating that the mailing date is no later than April 14.

All forms must be submitted before the Chief Clerk will sign the necessary printing requisition.

Professional Development Coursework

The Senate supports the professional development of Senators and legislative staff. Except as provided below, a Senator or a member of his or her staff may attend classes for purposes of obtaining instruction directly related to the Senator’s or staff person’s duties or proposed duties in the Senate. The Committee on Senate Organization must approve any such reimbursement or payment in advance of payment by the Chief Clerk, following the process for approval of out-of-district staff travel. The cost of attending such classes is charged to the Senator’s office expense account. This policy is intended to permit intermittent professional development coursework and does not permit a Senator or staff person to enroll part-time or full-time in a degree-granting institution.

Receptions

If funds are available, the Chief Clerk shall allocate a portion of the Senate’s operating budget for holding an inauguration reception, uniform fallen hero receptions, receptions paid for out of applicable leadership account, and any receptions approved by the Committee on Senate Organization as valid state expenditures. All such receptions shall be held in the Capitol and be open to the public.

Records

Disposition of Records

A departing Senator controls the disposition of the records of his or her office. The Senator should complete the proper form provided by LTSB concerning disposition of electronic records. Generally, a Senator may choose to delete electronic records, transfer them to a successor in office, or delete and receive a copy of the records. For additional information, contact the Chief Clerk or LTSB.

Senators who are committee chairpersons shall maintain any electronic versions of official committee hearing notices, records of committee proceedings, and committee reports that are saved within the databases used by the Legislature’s committee clerk software. Senators should not destroy these records.

Open Records

Custodian

Each Senator is the custodian of the records of his or her office and of the records of any committee of which he or she is the chair. The Chief Clerk is the custodian of the records of his or her office (e.g., personnel, per diem, purchasing, telephone records, travel records, and documents that are part of the permanent historical record of the Senate). Note that when a Senator leaves office prior to the expiration of his or her term, the Senator may choose to allow his or her staff to continue to have access to records of the office. In this situation, after the Senator leaves office, the leader of his or her party caucus (i.e., Majority or Minority Leader) is the custodian of those records and controls their disposition. See “Records Management” on page 30.

Assistance with the Response

Responding to a records request often requires a complex legal analysis. Offices may contact the Chief Clerk, Legislative Council, or the Legislative Reference Bureau for assistance whenever a records request is received. For example, the Legislative Council or Legislative Reference Bureau may help an office interpret a request, help determine if redactions may be appropriate, and provide guidance concerning response letters.

The Chief Clerk’s office and LTSB offer Senate offices assistance in facilitating delivery of records responsive to public records requests. This assistance is optional. In general, a Senator or staff person may convert all responsive records to PDF using a system offered by LTSB and then work with the Chief Clerk’s office to transmit all responsive records to the requestor. If a Senate office charges a fee for the actual, necessary, and direct cost of locating requested records, the Chief Clerk’s office will collect the amount charged to the requestor.

The Wisconsin Legislature considers each office the owner of their electronic data. As such, if LTSB



receives an open records request for data from a legislative office, that request is denied and the requester is referred to the legislative office in question. Please note that LTSB is not authorized to perform open records request searches, to make determinations about which search results meet the open records request, or to answer legal questions. If you receive an open records request and have questions, please contact the Senate Chief Clerk’s office, Legislative Council, Legislative Reference Bureau, or seek other legal counsel. LTSB will provide the following open records request support upon request:

- a. Identify legislative data sources, with an explanation of the type of data stored in each location.
- b. Provide documentation and one-on-one training on how to search each legislative data source.
- c. Produce data from the email backup system.
- d. Provide email confirmation of which of these services an office has received and when the services were rendered.

An office may invoice the requester for location fees as further described below.

Confidentiality

Pursuant to the holding in *State v. Zien*, Dane County Case No. 05 CV 2896, proposed legislation that has not been introduced may be withheld from public inspection under the public records law as a draft document, regardless of whether the proposed legislation was shared with other individuals or entities. To accomplish the public policy objectives of this exception from disclosure, it is likewise the policy of the Senate that any information that identifies, discusses, or refers to such proposed legislation may be withheld from public inspection.

Pursuant to *Schill v. Wis. Rapids Sch. Dist.*, personal emails and similar documents are not subject to disclosure under the public records law if the content of the email or document is unrelated to public business and the document does not evidence a violation of law or policy.

Hours of Inspection and Fees

Offices are open for business and inspection of records from 9:00 a.m. to 4:00 p.m., Monday through Friday, excluding holidays. Requests for records may be made at any time during normal business hours. The cost for copying documents is \$.15 per page. In addition, a Senate office may charge the actual, necessary, and direct cost of locating requested documents if the cost exceeds \$50.00. Fees may not be charged for redaction (*Milwaukee Journal Sentinel v. City of Milwaukee*, 2012 WI 65). Prepayment of fees may be required if the total amount exceeds \$5.00 (see s. 19.35 (3) (f), Stats). These fees may be waived.

Records Management

The records of the Senate, whether held by a Senator or the Chief Clerk, are governed by s. 16.61 (2) (b) 1., Stats. Neither a Senator nor the Chief Clerk is under any duty to preserve any records, except those that are subject to an open records request, an investigation, a litigation hold, or a court order prohibiting their destruction and except those that are otherwise required to be preserved as provided below. The Chief Clerk shall preserve all personnel, per diem, purchasing, and travel records of the Senate for three biennia plus the current session, except that records maintained in the LHRO shall be preserved as required by the Internal Revenue Service. Any other records of the Chief Clerk's office may be destroyed at his or her discretion. The Chief Clerk may contact the Wisconsin Historical Society prior to destruction. For further information, contact the Chief Clerk.

Scholar Program and Civics Education

The Chief Clerk shall administer civics educational programs. If funds are available, the Chief Clerk shall allocate a portion of the Senate budget to pay for the costs of the program. Otherwise, the Chief Clerk shall assess a tuition fee to cover the major costs of the

program. The Senate may assess a reasonable tuition fee not to exceed \$250 to cover a portion of the costs of the program and may seek grant funds and donations to underwrite all or part of the costs of the program. The Senate may pay for other program costs that are not covered by tuition or grant funds.

Senate Space Use

Many Senate spaces are available for use by groups and individuals outside of the Legislature. However, only persons who comply with the application procedures published by the Chief Clerk and administered by the Sergeant at Arms may reserve available Senate space for private use.

A member of the Senate must sponsor any non-government organizations or individual's use of any Senate space. The sponsoring Senator shall be responsible for that group's use of the facility. The Sergeant at Arms shall refer any request for use of Senate space that is not sponsored by a member of the Senate, or for which the sponsor is not going to be present, to the chair of the Committee on Senate Organization and the Minority Leader for review.

A \$50.00 per hour fee will be assessed to non-governmental entities and individuals for reservation and use of the Senate Chamber, Senate Parlor, and meeting spaces for non-legislative events that are held after 5:00 p.m. or on the weekends. The fee is intended to offset the cost of staff time devoted to assisting with the use of these spaces, and to offset the cost of maintenance and repair of the furnishings. The minimum number of hours assessed per reservation is three hours. Prepayment of the minimum fee is required along with a damage deposit of \$500.00. Any fee balance due at the conclusion of the event will be deducted from the damage deposit. Furnishings in Senate spaces shall not be moved to accommodate use by non-governmental entities or individuals.

The days of public availability for the Senate Chamber and Senate meeting spaces are Monday through Friday from 8:00 a.m. through 6:00 p.m., excluding holidays. The Senate Parlor is available Monday through Friday from 8:00 a.m. through 6:00 p.m. and Saturday and Sunday from 8:00 a.m. through 4:00 p.m., excluding holidays.

Chamber

Lighting or special media equipment may not interfere with the decorum of the Senate.

Extraordinary lighting in the Senate Chamber for the purposes of taking photographs should be coordinated between the Majority and Minority Leaders. The Senate membership should be afforded a minimum of one week's notice of such lighting.

No persons other than members of the chief clerk's staff, members of the staff of the Sergeant at Arms, members of a Senator's staff, and accredited correspondents of the news media may engage in any audio or video recording of the proceedings of the Senate without permission of the Committee on Senate Organization. Senators shall be notified of any such permission.

No food is allowed in the Senate Chamber.

A member or other person may consume beverages within the Senate Chamber, however the presiding officer may prohibit or restrict beverage consumption to preserve decorum. The presiding officer shall

designate an appropriate beverage container and an appropriate location to store the container, which may not include the top of a member's desk.

Legislative staff may not access the Senate Chamber while the Senate is sitting in session unless the legislative staff person presents his or her state issued identification card to the Sergeant at Arms or an employee in the office of the Sergeant at Arms. Senators and Representatives to the Assembly are not subject to this requirement. Additionally, this requirement does not extend to accessing the Senate Gallery.

Access to the Senate Chamber floor when the Senate is not in session is limited to individuals accompanied by official Capitol tour guides, legislators, Senate staff, or those authorized to access the floor by the President. Sitting in the chairs in the Senate Chamber is prohibited unless the individual is accompanied by legislators, Senate staff, or those authorized to access the floor by the President. The Senator or staff shall ensure that backpacks are removed before individuals are allowed to sit in the chairs.



Hearing Rooms

The Sergeant at Arms shall schedule the use of Senate hearing rooms in the following priority:

1. Party Caucuses
2. Senate Standing Committees
3. Senate Select Committees
4. Joint Committees
5. Senators
6. Assembly Standing Committees
7. Assembly Special Committees
8. Legislative or State Agency Groups
9. Groups or individuals sponsored by a Senator
10. Representatives to the Assembly

Parlor

The only persons admitted to the Senate Parlor during floor session shall be legislators, staff, constitutional officers, members of Congress, former members of the Senate, and invited guests of the members. No person involved in promoting or defeating legislation shall be invited into the Parlor.

Meetings of the Committee on Senate Organization held in the Parlor are open to the public. The Committee on Senate Organization may preempt any other use of the Senate Parlor. Any Senator may reserve the Parlor if there is no conflict with the Committee on Senate Organization or session.

Vestibule

The only persons admitted to the Senate Vestibule during floor session shall be legislators, staff, representatives of the media, constitutional officers, members of Congress, former members of the Senate, and invited guests of the members. No person involved in promoting or defeating legislation shall be allowed into the Vestibule unless the person is being escorted by a Senator or staff person in the office of the Senate Majority Leader, Senate Minority Leader, or Senate President, to their respective office.

Senate Space Approval

The approval of the President is required for use by any non-government organization or individual outside of the Legislature to reserve the Senate Chamber or Senate Parlor. The steps below must be followed to request approval:

- A letter of request by the sponsoring Senator must be written to the President. This letter should include: who wants to use the Senate Chamber or Senate Parlor; when they want to use the Chamber or Parlor; and for what purpose they want to use the Chamber or Parlor.
- Upon receipt of the letter, the President will mark the letter indicating its approval or denial. The President must then provide a copy of the marked letter to the Majority Leader, Minority Leader, Chief Clerk, and Sergeant at Arms. The Sergeant at Arms will notify the Senator whether the room request has been approved and make the reservation.
- Allow at least 10 business days to have this process completed.

Smoking Policy

Smoking is prohibited in the Capitol building and all state-owned buildings.

Stamps

Stamps may be requested from the Chief Clerk's office. A Senator may not purchase more than \$10,000 in stamps each biennial session unless approved by the Committee on Senate Organization. The stamp costs are deducted from the Senator's office expense account. Stamps purchased may not be returned to receive a credit to the office expense account. Any unused stamps must be returned to the Chief Clerk's office when leaving office.

Storage

Each senator has access to limited storage located outside of his or her Senate office. The Sergeant at Arms will periodically conduct an inventory of each Senator's storage and report the findings to each Senate office. The Sergeant at Arms will notify a Senate office prior to conducting an inventory of items in storage.

Supplies

The Chief Clerk shall maintain an inventory of office supplies which are available to every Senate office. Offices are permitted to special order office supplies at the discretion of the Senator. Office supplies may be obtained through the Chief Clerk's office. The cost of supplies is charged to the Senator's office expense account. "Office Supplies" includes writing utensils, desk/office accessories, filing, organizing and ergonomic accessories. Ergonomic accessories which cost over \$500 must be preapproved by the Committee on Senate Organization. No office supplies may be reimbursed without prior approval.

Event Supplies

The Chief Clerk shall maintain a small inventory of event supplies which are available to every Senate office to be used for receptions as defined on page 28 or a small meeting or reception for legislative purposes only. Offices are permitted to special order event supplies at the discretion of the Senator. Event supplies may be obtained through the Chief Clerk's office. The cost of supplies is charged to the Senator's office expense account. No event supplies may be reimbursed without prior approval.

Telephone Policy

1. The Senate uses a VoIP phone solution hosted by LTSB. More information can be found here: <https://ltsb.cms.wisleg.root.local/phones>
2. Each Senator and FTE will have an option between a handset or headset. LTE's and interns will only have the option of a handset.
3. Each office will have one voicemail. When your office receives a new voicemail, the Sen. LastName mailbox will receive an email with the voicemail as an attachment. You can then listen to the voicemail on your computer using headphones or your computer's speakers.
4. The state will pay long-distance calls placed to fulfill Senate responsibilities.
5. Collect telephone calls should not be accepted. Contact the Chief Clerk if you are receiving such calls.
6. Teleconference lines are available for use by Senators or employees for legislative teleconferences. Contact the Sergeant at Arms Office for the access code and host password.



Cellular Phones

The State of Wisconsin has entered into agreements with multiple cellular companies to provide cellular services to state agencies. Contact the Chief Clerk's office for information related to service options. The cost for cellular phone service, as well as any associated equipment, is charged to the office expense account of the applicable Senator. Per state contract, individuals will only be allowed one phone per two-year contract at the discounted price.

Personal Use of Telephones, Cellular Phones, and State Tablets

As a benefit of employment, the Senate allows each Senator and employee to engage in limited personal use of state telephones and cellular phones, provided the use does not impinge upon the Senator's or employee's completion of his or her duties and is consistent with the policies below. In addition to providing a quality work environment for Senators and employees, allowing limited personal use of the telecommunications system will help ensure that employees are proficient in the use of these communication tools.

While using state telephones and cellular phones, a Senator or employee is acting as a representative of the Senate and an employee is acting as a representative of his or her appointing authority. As such, Senators and employees should act accordingly so as not to damage the reputation of the institution. Senators and employees may not use state telephones and cellular phones to communicate under a hidden, false, or alternate identity.

Senators and employees may not use state telephones and cellular phones to promote their personal business interests, engage in discrimination or sexual harassment, engage in political campaign activity, or engage in any unlawful activity.

If personal cellular phone calls or long distance phone calls are made, the applicable Senator shall ensure that the cost of the calls is reimbursed to the state. As an alternative to reimbursing specific personal calls, a Senator may choose to reimburse a set amount per month, provided the Senator chooses an amount that covers the cost of any personal calls. The

reimbursement must be delivered to the Chief Clerk. The Chief Clerk shall not accept cash. The cost of local phone calls of a personal nature, other than cellular phone calls, need not be reimbursed.

Home and/or District Telephone, Fax, and Computer Connections

Senate business telephone lines may be installed in a Senator's home and/or district office. Appropriate communications equipment (telephone, computer, printer) will be provided. Any authorized computer and printer are provided by LTSB. Line costs, Internet, special features, and printer toner cartridges are charged to the Senator's office expense account. If the service is for a mix of state use and anything more than incidental personal use, the Senate will pay 50% of the cost of service. The State Telephone System (STS) or the State Defined Network (SDN) provides long distance service. Senators who use their personal phone lines for state business may be reimbursed for official calls.

There are several options for computer connections to a Senator's home and/or district office. All fees are charged to the Senator's office expense account. Contact the Chief Clerk's office to coordinate installation with LTSB and the provider.

District offices are allowed two land lines and Internet accessibility (U-Verse, Spectrum, etc.).

Videoconferencing

The Senate has the capability to conduct videoconferences. A request to use the equipment for committee hearings must be submitted to the Sergeant at Arms one week prior to the videoconference. It is recommended that videoconferences for other purposes be scheduled a minimum of 7 working days in advance.

Virtual and Tele-Town Hall Meetings and Roundtable Events

Senators and committees may conduct hearings, town hall meetings, or other meetings via virtual meeting technology, including Skype or Zoom. For virtual meetings hosted in the Capitol, it is recommended

that a Senator or committee contact the Sergeant at Arms at least three days in advance to ensure that room space capable of hosting a virtual meeting is available. A Senator may obtain a Zoom account from LTSB that may be used for any meeting directly related to the affairs of state government. A Senator or committee's use of virtual meetings technology does not require approval from the Committee on Senate Organization.

Webpages for Senators

The Chief Clerk's office provides custom website design for any Senator who requests it. The Chief Clerk's office follows the guidelines generally applicable to Senate publications when posting information to custom-designed webpages. See "Printing and Communications" on page 25 and ***Appendix III – Guidelines Regarding Legislator and Legislative Staff; Use of State-Supported Websites and Social Media Technology.***

Senate staff may have the Chief Clerk's web design staff post new content to their site. Staff may also post

content themselves. Staff wishing to post their own content should contact the Chief Clerk's web design staff for assistance.

Note that it is possible to obtain a domain name to use to redirect web users to the Senator's site. The name shall be in the form determined by the Chief Clerk. A domain name and redirector shall be obtained by the Senate Chief Clerk's Office and be paid for out of the Senator's office expense account.

In addition to designing websites for individual Senators, the Chief Clerk's office shall provide website design services to the Majority Leader, for purposes of creating a Senate majority website, and the Minority Leader, for purposes of creating a Senate minority website. Content may be posted to these websites only at the direction of the applicable leader's office. The purpose of these websites is to provide the public with a convenient source of information concerning the Senate majority's and minority's membership, legislative agenda, and legislative activities. The same standards apply with regard to the content of these websites as apply to other Senate-designed websites.



PER DIEM AND TRAVEL

Per Diem and Round-Trip Mileage

Section 13.123 (1) (a) of the Wisconsin Statutes authorizes a legislator to sign an affidavit certifying the necessity of establishing a temporary residence at the State Capitol for the period of any legislative session. It is the policy of the Senate that, for purposes of signing this affidavit, it is necessary to establish a temporary residence at the State Capitol if the legislator's permanent residence is outside of Dane County and the legislator expects to incur occasional or ongoing food and lodging expenses in Madison as a result of performing legislative business during the legislative session. With certain limited exceptions, a legislator who signs such an affidavit may then receive a per diem allowance for each day that he or she is in Madison on legislative business. A legislator may not receive a per diem allowance for Saturdays and Sundays unless the legislator is in actual attendance on such a day at a session of the Legislature or a meeting of a standing committee of which the legislator is a member. For the 2023-24 session, the maximum allowable per diem is \$140 per day. Members must sign an affidavit at the beginning of each legislative session authorizing the amount to be paid. This amount may not be changed during the session.

Alternatively, a legislator may sign an affidavit certifying that it is not necessary to establish a temporary residence at the State Capitol. Such a legislator is then entitled to one-half the maximum per diem allowance.

On floor session days, a legislator must be recorded as present at the session in order to receive a per diem payment for that day.

A Senator may not receive reimbursement of expenses from the state for any day for which the Senator claims per diem, except:

- Mileage, as permitted under the committee travel policy
- Travel expenses, other than meals and lodging, for travel outside of the district as permitted under the in-state leadership travel policy

- Travel expenses, other than meals and lodging, for travel outside of the district, incurred with the prior approval of the Committee on Senate Organization
- Authorized weekly round-trip travel expenses to and from Madison

Per diem and travel is submitted using a web-based program for all Senator's and staff. You will use your legislative login to access the program located at: <http://reimburse.wisleg.root.local/Home/Index> and can be accessed anywhere Internet access is available.

The Chief Clerk's office will process per diem/ travel the first working business day of the month. Subsequent processes will occur on Tuesdays with an email sent out each month from the Chief Clerk's office with the processing dates. All reimbursement will be a direct deposit.

TAXATION OF PER DIEM AND TRAVEL EXPENSES

Requests for per diem and reimbursement for travel expenses submitted to the Chief Clerk's Office later than 60 days after being incurred will be taxed in accordance with IRS publication 463.

<https://www.irs.gov/pub/irs-prior/p463--2021.pdf>

When submitting travel please be sure to include any required documentation needed (i.e., receipts, agenda and/or registration forms, etc.).

Members whose permanent residence is outside of Dane County may be reimbursed for one round trip per week to and from Madison for any week during which a member claims per diem.

A member of the Senate who wishes to claim reimbursement for a round-trip must so indicate on his or her per diem claim form.

A certificate of mileage must be signed and submitted to the Chief Clerk at the beginning of the biennium, giving the exact round-trip mileage from the Senator's home to the Capitol.



Travel Approval

Except as provided below, if a Senator or staff will be traveling outside of the district on business directly related to the affairs of state government, written approval must be obtained in advance of the travel from the Committee on Senate Organization. This requirement applies regardless of whether the travel expenses are paid or reimbursed by the Senate or another individual or entity. Except as provided below, the Senate will not pay or reimburse travel expenses until the Chief Clerk's office receives written approval from the Committee on Senate Organization.

As described below, the approval of the Committee on Senate Organization is often required for Senators and staff to travel. The steps below must be followed to request approval:

1. A letter of request must be written to the Chair of the Committee on Senate Organization. This letter should include: who is going to be traveling; where are they traveling to; when are they traveling; for what purpose are they traveling; and whether they will be requesting full, partial, or no reimbursement.
2. Supporting documentation needs to be sent along with the letter (i.e., conference information, registration materials, agenda, etc.).
3. If approved by the Chair, the Chair will forward the letter and supporting documents to the Chief Clerk who will then prepare and circulate ballots

to the members of the Committee on Senate Organization. When the ballots are returned, the Senator will be notified whether his or her travel request has been approved.

4. Allow at least 10 business days to have this process completed.

Leadership Travel

The Majority Leader, Minority Leader, and any member of leadership designated by the Majority or Minority Leader may travel within the state outside of their respective districts on business directly related to the affairs of state government without separate approval of the Committee on Senate Organization and may obtain reimbursement for such travel. In the case of a member of leadership other than the Majority or Minority Leader, the member shall submit to the Chief Clerk a letter from the appropriate leader approving the reimbursement.

Reimbursement by the Senate is not permitted for travel within the jurisdiction of any office which the Leader or designated Senator seeks beginning on the first day for circulation of nomination papers for that office, unless, in the Senator's discretion, the travel is directly related to the affairs of state government, the travel is not for political campaign purposes, and the travel is substantially similar to travel for which reimbursement was previously received. A Senator may not receive reimbursement on a day for which the Senator claims per diem, except as permitted

under the per diem and round trip mileage policy, above. In addition, the Majority Leader and Minority Leader may authorize their staff to travel within the state outside of their respective districts without separate approval of the Committee on Senate Organization (see “Staff Travel” on page 40).

Travel Accounting and Reimbursement

To obtain authorized reimbursement for travel expenses incurred while on state business, Senators and staff must submit their reimbursement request using the online reimburse website to the Chief Clerk’s office. Reimbursement can be made only for actual and necessary expenses. Those actual and necessary expenses will be reimbursed up to the maximum amounts established by the State of Wisconsin Division of Personnel Management.

The Chief Clerk’s office maintains records of individual Senator’s per diem and travel electronic reimbursement for tax purposes. Travel approved by the Committee on Senate Organization is charged to the Senator’s office expense account. Authorized travel by the Majority Leader, Minority Leader, or other member of leadership within the state outside of their respective districts on business directly related to the affairs of state government may be charged to the Senator’s office expense account or the appropriate leadership account, as directed by the Senator. If out-of-state or out-of-district travel is not pre-approved by the Committee on Senate Organization, the claimant will not be reimbursed for the expenses, except in the case of the Majority Leader, Minority Leader, or other member of leadership. No retroactive request for reimbursement is allowed.

Senator Travel

Travel During Floor Session

All travel approval is contingent upon the Senate not being in session. Travel must commence after adjournment of the session and end prior to the reconvening of the Senate. In the situation where a special or extraordinary session is called after travel has commenced, all efforts must be made to return prior to the convening of session. In such a case, the Senate will reimburse travel expenses to return prior

to the convening of session only if the travel is out-of-state and was approved by the Committee on Senate Organization prior to the Senator’s departure.

If a Senator fails to return from authorized travel during a scheduled session, expenses are not reimbursable for the time the Senate is in session.

In-District Travel

A Senator may travel to in-district meetings, conferences, events, etc. if, in the Senator’s discretion, the travel is directly related to the affairs of state government. This policy does not permit attendance at professional development classes or seminars. “In-district” means any portion of a county that is part of a Senator’s district and an area not to exceed 40 miles from those county boundaries. A map of these boundaries may be accessed on Anchor, the Senate’s intranet site. Separate approval by the Committee on Senate Organization is not required for reimbursement under this policy. Reimbursement is for actual and necessary expenses and is charged to the Senator’s office expense account. ***A Senator may not receive reimbursement from the Senate for in-district travel for a day for which the Senator claims per diem.*** In addition, reimbursement from the Senate for in-district travel is not permitted for a Senator beginning on the first day for circulation of nomination papers for any office with jurisdiction over all or part of the Senator’s district, unless in the Senator’s discretion, the travel is directly related to the affairs of state government, the travel is not for political campaign purposes, and the travel is substantially similar to travel for which reimbursement was previously obtained.

Other Travel

Except as provided below, a Senator may receive reimbursement for actual and necessary expenses incurred for out-of-state travel and in-state travel (other than in-district travel) only if the travel is authorized by the Committee on Senate Organization as directly related to the affairs of state government. The request for reimbursement must be made to the Committee on Senate Organization prior to the date of the travel, and must be accompanied by supporting documentation evidencing the benefit to the State of Wisconsin and/or the Senate. The Committee on

Senate Organization may refuse to authorize travel if supporting documentation is insufficient.

A Senator cannot receive reimbursement from the Senate if expenses are paid by an individual or by an entity other than the Senate. If an honorarium is received and the Senate pays expenses, the honorarium must be given to the Senate. Honoraria and expenses paid by individuals or entities other than the Senate are required by the Wisconsin Ethics Commission to be reported in writing or on the Statement of Economic Interest. A Senator may not receive reimbursement on a day for which the Senator claims per diem, except as permitted under the per diem and round-trip mileage policy, above.

Announced candidates for office are not eligible for in-state travel expense reimbursement within the district of the office the Senator seeks, unless, in the Senator's discretion, the travel is directly related to the affairs of state government, the travel is not for political campaign purposes, and the travel is substantially similar to travel for which reimbursement was previously obtained. Reimbursements for in-state and out-of-state travel that are paid by the Senate are charged to the Senator's office expense account.

In-state, out-of-district travel expenses for the Majority Leader, Minority Leader, and other members of leadership may be reimbursed without prior approval of the Committee on Senate Organization as described in the in-state leadership travel policy.

A Senator must submit requests for travel reimbursement that require approval by the Committee on Senate Organization through the Reimburse website, available at: <http://reimburse.wisleg.root.local/Home/Index>. The request for approval must include a description of the proposed travel, including all of the following information:

1. The name of the person travelling.
2. The location of the event to which the person is travelling.
3. The dates that the person will be travelling.
4. The purpose for which the person will be travelling, including an explanation of the benefit to the state.

5. Supporting documentation (e.g., conference information, registration materials, an agenda, etc.).
6. The approximate or actual costs related to the travel (airfare, lodging, registration, etc.).

Standing Approval to Attend Certain Meetings

A Senator's appointment by the Senate, the Governor, or pursuant to statute to a committee, board, commission, task force, etc., provides approval for attendance at official meetings and reimbursement of actual and necessary expenses. When submitting for reimbursement the Senator shall attach a copy of agenda, or other official documentation describing the activity for which reimbursement is claimed. (See policy "Committee Meetings Out of Capitol" on page 40 for standing committee travel approval.) Reimbursement is not charged to Senator's office account.

Lame Duck Travel

Pursuant to s. 13.123 (3) (b) 1., Stats., provides, in pertinent part: no member of the Legislature may be reimbursed for attendance at any meeting held outside this state, other than a meeting of the Legislature, a legislative committee, committee of the Joint Legislative Council or a statutory body of which the person is a duly constituted member, after the Chief Clerk of the member's house determines one of the following:

- After the day of the August primary, that the member either has not filed nomination papers for reelection or election to another legislative seat or has sought a party nomination for a legislative seat but it is generally acknowledged that the member has not won nomination.
- After the day of the general election, that it is generally acknowledged that the member has not been elected to a legislative seat for the succeeding session.

In making the determination under subd. 1., the Chief Clerk is bound by the determination of the administrator of the Wisconsin Elections Commission or the administrator's designee if such determination has been issued.

Committee Travel

Committee Meetings in Madison

Except as provided below, all committee meetings must be held in the Capitol or in legislative service agency facilities. All available state facilities within walking distance of the Capitol are to be used before any other facility may be used for committee meetings in the City of Madison. Prior approval by the Committee on Senate Organization must be obtained before any other space may be used. Approval of committee meetings in Madison is contingent upon the Senate not being in session. Expenses are not reimbursable during the time the Senate is in session.

Committee Meetings Out of Capitol

Senate committee chairpersons must receive prior approval by the Committee on Senate Organization for any committee activity out of the Capitol or legislative service agency facility. This approval must be obtained before notice of the meeting is published. A minimum of five business days should be allowed. Contact the Sergeant at Arms before scheduling the meeting. Room rental fees, reimbursement of actual and necessary expenses, and mileage should be included in the request to the Committee on Senate Organization for out of Madison meetings. It may also be necessary to request the use of a non-standard room set-up (see below). Travel expenses for committee meetings out of Madison are not charged to the chairperson's office expense account. A committee member who is in Madison on legislative business and attends an authorized committee meeting outside of Madison may receive reimbursement for mileage between Madison and the committee meeting and still claim that day as a per diem day. If meals or lodging are provided to a committee member by the state on a per diem day, the member shall reimburse the state the cost of the meal or lodging.

A chairperson may be accompanied by no more than one of his or her staff people. In extraordinary situations, the Committee on Senate Organization may authorize additional staff of committee members to attend. The messengers assigned to the committee meeting by the Sergeant at Arms shall

also attend. (See "Transportation" on page 43 for the reimbursement policy regarding the necessity to use a state-owned vehicle.) At the discretion of the Sergeant at Arms, additional members of the Sergeant at Arms' personnel may staff hearings.

Staff Travel

In-District Travel

A Senator's staff person may travel to in-district meetings, conferences, events, etc. or may travel to and from the Capitol if, in the Senator's discretion, the travel is directly related to the affairs of state government. This policy does not permit attendance at professional development classes or seminars. "In-district" means any portion of a county that is a part of a Senator's district and an area not to exceed 40 miles from those county boundaries. A map of these boundaries may be accessed on Anchor, the Senate's intranet site. Reimbursement is for actual and necessary expenses and is charged to the Senator's office expense account.

An employee may also travel to in-district meetings, conferences, events, etc. for a Senator who is not the employee's appointing authority with prior written authorization from both the employee's appointing Senator and the Senator whose district the employee will be traveling to. Reimbursement is for actual and necessary expenses and is charged to the office account of the Senator whose district the employee traveled to.

Separate approval of the Committee on Senate Organization is not required for reimbursement under this policy. This policy does not authorize reimbursement for the ongoing commuting expenses of a Senator's staff member. In addition, reimbursement for in-district travel is not permitted for a Senator's staff beginning on the first day for circulation of nomination papers for any office with jurisdiction over all or part of the Senator's district, unless, in the Senator's discretion, the travel is directly related to the affairs of state government, the travel is not for political campaign purposes, and the travel is substantially similar to travel for which reimbursement was previously obtained.



In-State Travel

Travel in state, other than in-district, is permitted for staff with the prior approval of the Committee on Senate Organization. Approval for reimbursement shall be limited to issue seminars and meetings directly related to the Senator's district and/or the Senator's committee assignments, conferences, and professional development seminars. Reimbursement is for actual and necessary expenses and is charged to the Senator's office expense account.

Staff must request approval for travel reimbursement through the Reimburse website, available at: <http://reimburse.wisleg.root.local/Home/Index>. The request for approval must include a description of the proposed travel, including all of the following information and be approved by the Senator:

1. The name of the person travelling.
2. The location of the event to which the person is travelling.
3. The dates that the person will be travelling.
4. The purpose for which the person will be travelling, including an explanation of the benefit to the state.
5. Supporting documentation (e.g., conference information, registration materials, an agenda, etc.).
6. The approximate or actual costs related to the travel (airfare, lodging, registration, etc.).

Out-of-State Travel

Travel for official business out-of-state is permissible for staff with the prior approval of the Committee on Senate Organization. Senate staff is permitted to attend only meetings, conferences, or professional development seminars designed specifically for staff. A staff member may not attend a policy conference on behalf of a Senator, unless the staff member will not be seeking reimbursement for any expenses. Reimbursement is for actual and necessary expenses and is charged to the Senator's office expense account.

Staff must request approval for travel reimbursement through the Reimburse website, available at: <http://reimburse.wisleg.root.local/Home/Index>. The request for approval must include a description of the proposed travel, including all of the following information and be approved by the Senator:

1. The name of the person travelling.
2. The location of the event to which the person is travelling.
3. The dates that the person will be travelling.
4. The purpose for which the person will be travelling, including an explanation of the benefit to the state.
5. Supporting documentation (e.g., conference information, registration materials, an agenda, etc.).
6. The approximate or actual costs related to the travel (airfare, lodging, registration, etc.).

Leadership Staff Travel

The Majority and Minority Leader may each assign members of their staff to engage in in-state travel, outside of their respective districts, for purposes of attending committee hearings or legislative events and legislative activities specific to Senators. Prior to any staff member engaging in travel under this policy, the Majority or Minority Leader shall provide the Chief Clerk with a letter specifically authorizing the travel as directly related to the affairs of state government and directing the manner in which reimbursements are to be assessed pursuant to this policy. Any staff member engaging in such travel may not attend political campaign events or engage in political campaign activities while traveling. Reimbursement is not permitted for travel within the jurisdiction of any office which the Leader seeks beginning on the first day for circulation of nomination papers for that office, unless, in the Leader's discretion, the travel is directly related to the affairs of state government, the travel is not for political campaign purposes, and the travel is substantially similar to travel for which reimbursement was previously received. A staff member who engages in travel under this policy may receive reimbursement for actual and necessary expenses of the travel. Reimbursements paid under this policy are charged to the office expense or leadership account of the Majority or Minority Leader or the office expense account of the requesting Senator.

Staff Lodging During Session

Full-time Senate staff whose primary residence is outside of Dane County may be eligible for lodging reimbursement if there is inclement weather, or they will be engaged in legislative business that goes beyond 9:00 P.M., due to a late session of the Senate or a Senate committee meeting of which their appointing authority is a member, or are non-partisan staff. Parking, meals or other incidentals are not eligible for reimbursement. Reimbursement is charged to that office's expense account, or a leadership expense account, and will require a letter from the appointing authority authorizing the approval for reimbursement. All claims for lodging must be submitted through the on-line reimburse website and will require a receipt.

Reimbursement

Travel Expenses for Caucus Meetings

Senators-elect may be reimbursed for mileage, meals, and lodging expenses incurred as the result of attending respective caucus organizational meetings prior to being administered the oath of office.

Lodging

The maximum amount for in-state lodging is the current rate of reimbursement authorized under the state compensation plan. Lodging fees may exceed the maximum if it is a conference site hotel, or if lodging at the maximum amount is not available and an explanation of the higher rate is provided. All claims for lodging submitted must be accompanied by a receipt. Senators and staff will be reimbursed for lodging at the single rate only.

Senators and/or staff traveling on legislative business are exempt from Wisconsin state sales or use taxes on their motel or hotel lodging, when the sale is properly documented as sold to the state or any agency or instrumentality thereof. Contact the Chief Clerk's office for a wallet-size card documenting this policy for hotel management.

Luggage Fees

Airlines fees for checked baggage are a reimbursable expense. This is a reimbursable expense. However, the number of bags checked must be reasonable for the purpose of the trip. Employees must provide receipts to document the cost of the checked bags. If business travel is combined with vacation/personal travel, the reimbursable expense for the additional checked bags must relate to the number of bags necessary for the business portion of the trip and not the vacation/personal portion of the trip.

Meals

The maximum allowable in-state amounts that can be reimbursed for meals (including tax and tips) are as follows: breakfast \$9.00; lunch \$11.00; dinner \$21.00. The maximum allowable out-of-state amounts that can be reimbursed for meals (including tax and tips) are as follows: breakfast \$10.00; lunch \$15.00; dinner \$25.00.

Senators and staff may spend the meal allowance in the manner they choose for two or more consecutive meals in a day, provided the total reimbursement claim does not exceed the individual meal rates for that day. The maximum allowable tip is 15% of the meal cost and is included in the state maximum allowable meal amounts listed in this section. An individual can claim breakfast if he or she leaves home before 6:00 a.m., lunch if he or she leaves home before 10:30 a.m. and returns after 2:30 p.m., and dinner if he or she returns after 7:00 p.m. Non-overnight meals are taxable.

Transportation

Individuals using privately-owned automobiles and motorcycles for authorized travel may be reimbursed at the current rate of reimbursement authorized under the state compensation plan. Persons using other forms of transportation for authorized travel will be reimbursed for actual and necessary expenses when those claims are submitted accompanied by a receipt. Use of privately-owned automobiles or motorcycles for travel of great distance will be

reimbursed at the lowest airfare available, or mileage at the applicable reimbursement rate, whichever is less.

When renting a vehicle in the United States, use the state contract vendor, whose rate includes free collision and liability insurance. If the state contract vendor is unable to provide a vehicle as needed and another domestic vehicle rental vendor is used, the collision damage waiver (CDW) and liability insurance must be purchased. Contact the Chief Clerk's office for additional vehicle rental information. The Committee on Senate Organization must approve vehicle rental requests prior to travel.

Receipts are required for one-way fares exceeding \$25.00.

Travel Voucher Instructions

The travel voucher system is accessed through this website using Google Chrome: <http://reimburse.wisleg.root.local/Home/Index>. Instructions are available at the top of the online form.



APPENDIX I

BENEFIT SUMMARY

Benefited Employee Information

The benefit package for employees of the Senate is very comprehensive, covering the full range of benefits from health insurance to disability insurance to retirement. The current (2023) ratio of salary to benefits is 36.18% for staff. Below are general descriptions of each benefit. Please refer to specific plan documents that are provided during benefit orientation for further details and interpretation of these benefits. In the event the terms and conditions of the benefit plan itself conflicts with the terms as described in this policy manual, the terms and conditions of the benefit plan will control.

General questions relating to insurance and employee fringe benefits should be directed to the LHRO at 608-316-9700.

The employee is responsible for notifying the LHRO of any change in family status (i.e., marriage, divorce, birth/adoption of dependent, etc.) for insurance purposes. This must be done within 30 days of occurrence. This timely notice is required in order to have the employee complete the necessary paperwork for changes in benefits. Failure to comply with this timely notification can result in delay, alteration, or possible denial of coverage.

Wisconsin Retirement System

All benefited legislative employees must participate in the Wisconsin Retirement System. Benefited employees are required to contribute 6.8% (2023 rate) of their gross monthly salary into their retirement fund—the State of Wisconsin matches this contribution. General employees are eligible for retirement at age 55 (57 with 30 years of service to receive full benefits) with annuity amounts based on several factors including length of service, highest three years of career salary, and market performance. For more information regarding the Wisconsin Retirement system, please visit the following link:

<https://etf.wi.gov/retirement/wrs-retirement-benefit>

Health Insurance

The State of Wisconsin offers several different comprehensive health maintenance organizations (HMOs) throughout the state. In general, plans are required to provide uniform medical, dental benefits, and wellness programs at a uniform premium to the employee. Standard and maintenance plans are available, at a higher cost, for additional coverage needs. High deductible health plans are also available.

Co-pays, co-insurances, and deductibles may apply depending on the coverage chosen and the type of service provided.

Coverage may also be available for adult children. For more information regarding the available health plans, please visit the following link:

<https://etf.wi.gov/its-your-choice/2023/state-employee-retiree-health-plan>

Delta Dental Uniform and Supplemental Dental Insurance

Delta Dental provides a broad range of dental coverage options depending on your family's dental needs. For more information, please visit the following link:

<https://etf.wi.gov/insurance/dental-insurance>

DeltaVision Supplemental Insurance

Supplemental vision insurance can enhance your base vision coverage provided by your health insurance by providing discounts for eyewear and contact lenses and exams. For more information, please visit the following link:

https://dpm.wi.gov/Documents/Central%20Benefits/2021_Vision_Guide.pdf

Group Term Life Insurance

Term insurance is a life insurance policy that provides coverage during your employment with the Senate. If the insured passes away while actively employed, a death benefit will be paid. Term insurance has no cash value. In other words, the only value is the guaranteed death benefit from the policy. The maximum benefit is equal to five times an employee's annual salary. Spouse and dependent coverage is also available up to \$20,000 and \$10,000, respectively. Premium rates are based on age and salary and are updated yearly.

As required by the Internal Revenue Service, an imputed value is calculated on life insurance coverage in excess of \$50,000. The value computed appears on each employee check stub and W-2 and is added to wages for tax calculations.

<https://etf.wi.gov/benefits/benefits-provided-etf/life-insurance>

Securian Accident Plan

The Securian Accident Plan provides a cash benefit paid directly to you to help cover out-of-pocket expenses due to an accidental injury.

They also offer Identity Theft and Travel Assistance as well as Accidental Death and Dismemberment coverage, up to \$100,000.

For an extensive list of covered injuries and further detailed information on this program, please visit:

<https://etf.wi.gov/insurance/accident-plan>

Income Continuation (Disability) Insurance

This plan will replace up to 75% of your salary in the event you should become 100% disabled.

The plan provides replacement income for disabilities that are considered short term in nature as well as those which may last for extended periods. Depending on your age at the time disability commences, the plan may continue disability payments until age 70. Please visit the following link for more detailed information:

<https://etf.wi.gov/benefits/benefits-provided-etf/income-continuation-insurance>

Long-Term Care Insurance

This program will provide long-term care insurance for an employee, spouse, and the parents of either the employee and/or employee's spouse. The program covers care for such items as nursing home care, home health care, assisted living, and community-based living. Please visit the following link for more detailed information:

http://etf.wi.gov/members/benefits_ltc.htm

Employee Reimbursement Account Program: Flexible Spending Account (FSA) - Health Savings Account (HSA)

FSAs and HSAs allow you to set up an account to pre-fund your anticipated, eligible dependent day care expenses or medical services and supplies that are normally not covered by your insurance. You decide how much to set aside and that amount is deducted from each paycheck before your federal, state, and FICA taxes are calculated, saving you money on taxes. Please visit the following link for more detailed information:

<https://etf.wi.gov/its-your-choice/2023/state-employee-retiree-health-plan/pre-tax-savings-accounts>

Wisconsin Deferred Compensation (WDC)

The WDC is an Internal Revenue Code Section 457 deferred compensation plan. With a WDC account, you can invest pre-tax or Roth (post-tax) dollars in a variety of investment options.

Pre Tax: If you choose the pre-tax option, these deferrals reduce your taxable income, which in turn, lowers your current state and federal income taxes. Also, any interest/gains you earn are tax free (until you withdraw the funds).

Roth (Post Tax): If you choose the Roth (post-tax) option, your deferrals are taxable in the year you make

them. They are not taxed when distributed. Earnings are also not taxed, provided that your age is at least 59 1/2 and you have held your Roth account for at least five years. Please visit the following link for more detailed information:

<https://etf.wi.gov/retirement/wisconsin-deferred-compensation-program>

Commuter Benefits Program

The Commuter Benefits Program allows employees to set aside money on a pre-tax basis and use these monies to reimburse themselves for out-of-pocket transportation costs like parking, van pool fees, and bus passes. This program can be started, changed, or stopped at any time. Please visit the following link for more detailed information:

<https://etf.wi.gov/its-your-choice/2023/state-employee-retiree-health-plan/pre-tax-savings-accounts>

NOTE: Click on “Parking Account” or “Transit Account” after clicking on hyperlink above.

Metro Transit Commute Card Program

The Metro Commute Card is an annual unlimited ride pass for employees to use the Madison Metro bus to transport to and/or from work. The cost is based on a flat fee per ride of \$1.40. Employees can use the Commute Card as much or as little as needed each month.

Please report a lost or stolen Commute Card immediately to the LHRO. Your Commute Card will be deactivated and you’ll receive a new one immediately at no additional cost.

Direct Deposit

Direct Deposit of regular monthly paychecks into multiple accounts is available to all employees. Funds can be deposited at almost any financial institution in numerous accounts. Contact the LHRO for more information and/or to enroll.

Edvest College Savings Program

When you contribute to the Edvest College Savings Plan, there are potential state and federal tax savings as a result of those contributions and any interest earned. Please visit the following link for more detailed information:

<https://www.edvest.com/>

Employee Assistance Program (EAP)

Kepro EAP is a free service to all Senate employees and their dependents. This program offers a wide variety of counseling, referrals, and reference services, all designed to make your family healthier, happier, and provide for a more balanced work and home life. These services fall under HIPAA confidentially rules. Some legal and financial counseling may have associated fees. Please visit the following website for more information:

<https://sowi.mylifeexpert.com>

Password: SOWI



APPENDIX II

HARASSMENT, DISCRIMINATION, RETALIATION, VIOLENCE, AND BULLYING

Introduction

The Senate is committed to assuring that it operates in an environment that is free from harassment, discrimination, and retaliation based upon race, color, creed, sex, religion, national origin or ancestry, age (40 or older), disability, marital status, pregnancy, sexual orientation, gender identity, arrest or conviction record, military service, use or nonuse of lawful products, genetic information, or any other applicable protected classification as specified by state and federal law, except as permitted under applicable law. The Senate also prohibits violence and bullying in the workplace, as defined below. In addition, this policy contains illustrative examples of prohibited behaviors; however, the Senate has the right to determine what constitutes inappropriate behavior under this policy, and take any level of corrective action (including termination) it deems appropriate.

For these reasons, the Senate will not tolerate harassment, discrimination, retaliation, bullying or violence, as defined below, or any other behaviors that are considered inappropriate/unacceptable in the Legislature. The Senate is committed to preventing or stopping such actions/behaviors whenever it may occur. The policy presented here applies directly to the Senate (legislators and staff); however, every feasible action necessary will also be taken to protect Senate employees from harassment and discrimination from external sources as well, including but not limited to: lobbyists, the public, and employees working for other branches of government/the private sector.

In addition, it is important for legislators and employees to understand that concerns and/or complaints related to harassment, discrimination, retaliation, bullying, violence, or any other behaviors that are deemed inappropriate/unacceptable in the Legislature, may cover conduct that occurred outside of the work location and outside of work hours, and is not solely limited to conduct that occurred at the work location and/or on work hours.

Harassment, Discrimination, and Retaliation Defined

The Senate prohibits discrimination. Discrimination can include disparate treatment directed toward an individual or group of individuals based upon race, color, creed, sex (including pregnancy), religion, national origin or ancestry, age (40 or older), disability, marital status, sexual orientation, gender identity, arrest or conviction record, military service, use or nonuse of lawful products, genetic information, or any other applicable protected classification as specified by state and federal law.

The Senate also prohibits harassment. Harassment is a form of employment discrimination that violates Title VII of the Civil Rights Act of 1964, the Age Discrimination in Employment Act of 1967, the Americans with Disabilities Act of 1990 (ADA), or the Wisconsin Fair Employment Act (WFEA). Harassment is unwelcome conduct that is based on race, color, creed, sex (including pregnancy), religion, national origin or ancestry, age (40 or older), disability, marital status, sexual orientation, gender identity, arrest or conviction record, military service, use or nonuse of lawful products, genetic information, or any other applicable protected classification as specified by state and federal law.

Harassment Exists Whenever:

- Submission to harassing conduct is made, either explicitly or implicitly, a term or condition of one or more individuals' employment, internship, partnership, or services;
- Submission to or rejection of such conduct by an individual or group is used as the basis for decisions about employment, internship, partnership, or services affecting such individual; and/or,
- The conduct has the purpose or effect of substantially interfering with an individual's or group's work performance or of creating an intimidating, hostile or offensive work, or service delivery environment. (A hostile work environment exists when the conduct is such that a reasonable

person, under the same circumstances as the employee, would consider the conduct sufficiently severe or pervasive to interfere substantially with the person’s work performance or to create an intimidating, hostile, or offensive work environment.)

In addition, the Senate also prohibits retaliation against employees. Retaliation is a materially adverse action against an employee by an employer for engaging in legally protected activity, such as bringing forward a concern or making a complaint, participating in workplace investigations (as a complainant, witness, etc.), or requesting/receiving a family or medical Leave (FMLA) or reasonable accommodation. Retaliation can include any negative job action, such as demotion, discipline, firing, or salary reduction.

It is the Senate’s goal to prevent the occurrence of harassing, discriminatory and retaliatory activity and to promptly stop such conduct when we become aware of potential violations. In that respect, it is imperative that all instances of potential harassment, discrimination, and/or retaliation be reported to the appropriate supervisor or the LHRO immediately. While based on state and federal law, this policy

may cover behaviors, which may not meet the legal definition of harassment, discrimination, or retaliation but are considered unacceptable in the Legislature. This policy will be interpreted so as to avoid infringement upon First Amendment rights of free speech.

Sexual Harassment

Sexual harassment includes unwelcomed sexual advances, requests to engage in sexual conduct, and other physical and expressive behavior of a sexual nature where:

- (a) Submission to such conduct is made either explicitly or implicitly a term or condition of an individual’s employment or education;
- (b) Submission to or rejection of such conduct by an individual is used, or threatened or suggested to be used, as the basis for employment decisions affecting the individual (Quid Pro Quo);
- (c) Such conduct substantially interferes with an individual’s performance or creating an intimidating, hostile, or demeaning work environment.



Determination as to whether the alleged conduct constitutes sexual harassment should take into consideration the totality of the circumstances, including the context in which the alleged incidents occurred.

Under this policy, sexual harassment can be verbal, visual, or physical. It can be overt, as in the suggestion that a person could get a raise in salary or promotion by submitting to sexual advances. The suggestion or the advance need not be direct or explicit—it can be implied from the conduct, circumstances, and relationships of the persons involved.

Sexual harassment can also consist of persistent, unwelcome attempts to change a professional relationship to a personal one.

It can range from unwelcome sexual flirtations and inappropriate demeaning of individual persons or classes of people to physical contact/abuses such as sexual assault.

Examples could include, but are not limited to: unwelcome sexual advances; repeated and unwelcome sexually-oriented bullying, teasing, joking, or flirting; verbal abuse of a sexual nature; commentary about an individual's body, sexual prowess, or sexual deficiencies; derogatory or demeaning comments about women or men in general, whether sexual or not; leering, touching, pinching, or brushing against another's body; or displaying objects or pictures, including electronic images, which are sexual in nature and which create a hostile or offensive work environment.

The interpretation of sexual harassment in the law and the Senate's policy provides that:

- Sexual harassment generally carries a component of power differential between individuals and can occur between men and women or between members of the same sex.
- An employee does not have to suffer economically before harassment can be found.
- A person who, on the surface, consents to sexual advances might still be subjected to harassment.
- Whether conduct is welcome or unwelcome depends on the “eye of the beholder” and a “reasonable person” test.

- Offenders can be legislators, co-workers, or non-employees (including but not limited to: lobbyists, the public, and employees working for other branches of government/the private sector).
- A third person can be offended by harassing behavior among willing participants.
- Harassment does not necessarily have to be reported soon after it occurs to be addressed.
- A single incident or a few incidents may not be illegal harassment; however, a single incident of unwanted touching of a person's intimate body part could be sexual harassment.
- Non-sexual but abusive, hostile, rude, or harsh treatment of members of one gender may also constitute harassment.

Consensual Relationships (Supervisor/Subordinate)

Sexual, romantic, or intimate relationships between persons in a supervisor/subordinate relationship that appear to be voluntary and welcome may nonetheless constitute sexual harassment under this definition. Relationships between a supervisor and those employees whom he or she supervises may give rise to legal and ethical concerns or a conflict between personal and professional interests. Although such a relationship may be viewed by the parties involved as consensual, that fact alone does not mean that no sexual harassment exists.

Relationships between supervisors and subordinates are not allowed in the Senate.

Supervisors involved in such relationships have the obligation to remove themselves from the consensual relationship.

Racial Harassment

Harassment that is directed at a person or group of persons because of race, color, creed, national origin, or ancestry is covered under this policy. Even if actions are not directed at specific persons, a hostile environment can be created when the conduct is sufficiently severe or pervasive and objectively offensive so as to substantially interfere with the person's work or employment experience.

Harassment Based on Religion, Disability, Sex (including Pregnancy), Age (40 and older), Marital Status, Sexual Orientation, Gender Identity, Arrest or Conviction Record, Military Service, Use or Nonuse of Lawful Products, Genetic Information, or Other Protected Status

Harassment that is directed at a person or group of persons because of any characteristic protected by this policy or local, state, or federal law is also covered under this policy.

Retaliation

Retaliation against an individual for bringing forward a concern or making a complaint (even if they are not the victim), for resisting discrimination or harassment, or for assisting in the investigation of a complaint (such as witnesses) is a violation of Senate policy action and will not be tolerated.

Violence and Bullying Prohibited

Most incidents of workplace violence are not lethal, yet have devastating physical and emotional consequences for vulnerable victims. In addition, they create a negative work place dynamic and create an unacceptable workplace environment. Examples of prohibited violence and bullying include, but are not limited to:

- Teasing and practical jokes that cause anger and/or humiliation
- Intimidation
- Bullying
- Angry outbursts
- Verbal abuse, name calling, biting sarcasm or obscene language
- Threats (verbal, written, or gesticulated)
- Harassment (general and sexual)
- Theft, vandalism, and sabotage
- Throwing or breaking objects

- Hitting, pushing, poking, slapping, grabbing, and other forms of physical battery
- Romantic obsessions and stalking
- Sexual assault and rape

Concern/Complaint Resolution

In an effort to prevent or stop discriminatory, harassing, retaliatory, or other inappropriate behavior, the Senate has adopted specific avenues through which an individual can bring his or her concern or complaint forward to be resolved. With issues of discrimination, harassment, retaliation, violence, or bullying, it is important to identify and remedy the situation as soon as possible. For this reason, we have established two different resolution methods that employees may use to raise discrimination, harassment, retaliation, violence, bullying or other inappropriate behavior concerns—an Informal Concern Resolution and a Formal Complaint Resolution Process. Employees have the right to choose which process they would like to pursue (there is no requirement to engage in one process before another). In addition, employees who engage in the Informal Concern Resolution process first, may decide later to pursue the Formal Complaint Resolution process. Each process is discussed more in depth below. Questions related to each process should be addressed with the LHRO.

To best remedy a situation, complainants or witnesses (which includes legislators/staff who witness or are made aware of inappropriate behavior) are urged to promptly share concerns or complaints rather than risking their well-being or negatively affecting the Senate's ability to look into such concerns/complaints, due to the passage of time and potential departure of witnesses.

Informal Concern Resolution Process

Under the Informal Concern Resolution Process, an employee can bring his/her concern, either verbally or in writing, to a supervisor with authority over the person against whom the concern is directed, to the employee's supervisor, or the Legislative Human Resources Office (LHRO). The employee's concern will be addressed/resolved in an appropriate manner. If an employee would like his/her concern addressed



through a formal investigation, the employee should utilize the Formal Complaint Resolution Process below.

Supervisors who receive employee concerns should either:

1. Refer the employee's concern to the LHRO to resolve, if the supervisor does not have the ability to resolve the concern or would prefer for the LHRO to resolve the concern; or,
2. Meet with the employee to discuss the concern and attempt to resolve the employee's concerns as soon as possible, but consistent with the severity and complexity of the matter. Resolution of such concerns may include, but is not limited to: speaking with appropriate parties and making sure any inappropriate behavior stops (and following up at a later date to make sure the behavior has not resumed); when appropriate, working with the LHRO to provide mediation for employees; when appropriate, working with the LHRO to provide remedial training for an employee/employees; disciplinary action; termination, etc. (if discipline or termination is pursued as

a result of an informal concern, please consult with the LHRO prior to discipline/termination, when possible). Supervisors should document the concern/resolution of the concern.

Supervisors and the LHRO will take prompt and effective action on any concern received. In addition, supervisors and the LHRO will maintain confidentiality to the extent possible. Lastly, retaliation for bringing forward a concern or aiding with a concern will not be tolerated and should be immediately reported to the LHRO.

Formal Complaint Resolution Process

Under the Formal Complaint Resolution Process, an employee can bring a complaint in writing, detailing the individual(s) involved, violations/behavior, locations, dates/times, witnesses, how the complainant would like his/her complaint resolved, and any other information relevant to the complaint, to the Legislative Human Resources Office (LHRO). The employee's complaint will be reviewed, and if appropriate, formally investigated. If an investigation finds inappropriate behavior on the part of an individual involved, the inappropriate

behavior will be addressed/resolved in an appropriate manner. If an employee does not wish to pursue a formal investigation into his/her complaint/concern, the employee should utilize the Informal Concern Resolution Process above.

Once a complaint is received from an employee, the LHRO will:

1. Meet with the employee to discuss the employee's complaint, determine if the complaint meets the standards of investigation, and if so begin the complaint investigation (if the employee's complaint does not meet the standards of investigation, he/she may instead utilize the Informal Concern Resolution Process above);
2. Interview pertinent witnesses;
3. Interview the subject(s) of the complaint;
4. Come to an investigatory conclusion;
5. Share the investigatory conclusion with appropriate leadership/legislator(s); and,
6. Work with appropriate leadership/legislator(s) to address any inappropriate behavior in an appropriate manner.

The Senate will take prompt and effective action on any complaint received. In addition, the Senate will maintain confidentiality to the extent possible. Lastly, retaliation for bringing forward a complaint or aiding with a complaint will not be tolerated and should be immediately reported to the LHRO.

*** Please note that this policy does not create any legally enforceable rights, contract, timeframes or protections beyond those of the State or Federal Equal Employment Opportunity laws, even if the Senate prohibits conduct which is less than the legally defined standards for harassment/discrimination/retaliation or other actionable conduct under these laws.**

Confidentiality

Persons seeking general information or guidance about bringing forward a concern or complaint may be concerned about whether the information they share will be confidential. While the Senate strives to maintain an environment in which individuals feel comfortable bringing forward concerns and complaints, legal obligations may require us to take some action once information is brought forward indicating that harassment, discrimination, retaliation, violence, bullying, or any other inappropriate behavior is occurring. Because of their positions of authority, certain personnel are obligated to take action when they receive such concerns or complaints. Although the confidentiality of the information received and the privacy of the individuals involved cannot be guaranteed, they will be protected to as great an extent as is legally possible. The expressed wishes of the employee regarding confidentiality will be considered in the context of our legal obligations to the extent possible.

Sanctions

Employees found to have engaged in harassment, discrimination, retaliation, violence, bullying, or any other behaviors that are deemed inappropriate/unacceptable in the Legislature are subject to appropriate disciplinary action, up to and including termination of employment.

Anti-Harassment Training Requirement

All Senators and Senate staff are required to attend anti-harassment training during each biennial session (provided by LHRO).

APPENDIX III

GUIDELINES REGARDING LEGISLATOR AND LEGISLATIVE STAFF USE OF STATE-SUPPORTED WEBSITES AND SOCIAL MEDIA TECHNOLOGY

This document provides guidance regarding the applicability of Chapter 11 of the Wisconsin Statutes, relating to campaign financing, and Chapter 19 of the Wisconsin Statutes, relating to the code of ethics for public officials, to the use of state-supported websites and social media technology. This document does not attempt to capture all possible situations related to these technologies.

The use of state-supported websites and social media technology by legislators and their staff shall conform to all legislative rules and policies and all applicable federal, state, and local laws.

General Use

Legislators and their staff may use state resources to create, post information to, and maintain state-supported websites, herein referred to as legislator

home pages, to communicate for legislative purposes. Each legislator is responsible for the content of his or her legislator homepage.

Legislators and their staff may use state resources to use social media technology, such as Facebook, Twitter, LinkedIn, etc., to communicate for legislative purposes.

Legislators and their staff may not use state resources to create, post information to, or maintain campaign or business websites.

Each substantially identical posting created with state resources to a legislator homepage or social media website counts as one of the 50 pieces as specified in s. 11.1205, Wisconsin Statutes. However, messages sent directly to individuals using social media technology count as one piece per recipient. The distinction is that with posts to a legislator homepage



or social media website, individuals elect to visit the website or receive notices that the social media systems themselves distribute. Thus, creating a post is like issuing a single press release to the media, which in turn may distribute it to any number of people. Whereas with direct messages, the sender has to select the recipients which is similar to sending email or postal mail.

Legislators and their staff may add links on their legislator home pages to any content or website used to communicate for legislative purposes, including links to their legislative social media websites, except they should not contain links to websites containing campaign or business content.

Use of Legislative Social Media Websites

Legislators and their staff may use state resources to create, post information to, and maintain legislative social media websites defined as social media websites which exclusively contain material used to communicate for legislative purposes.

Each legislator is responsible for the content of his or her legislative social media websites. However, if a legislator chooses to remove inappropriate material from his or her legislative social media website, or prohibit others from posting material on his or her legislative social media website, it is recommended that the legislator take such actions pursuant to a content-neutral social media policy.

Legislators and their staff may add links on their legislative social media websites to any content or website used to communicate for legislative purposes, except they should not contain links to websites containing campaign or business content.

Use of Mixed-Content Social Media Websites

Legislators and their staff may post content to websites that contain a mix of legislative, personal, business, and campaign materials, as long as they adhere to the following guidelines:

1. State resources should not be used to create the mixed-content websites.
2. **Legislative staff may publish legislative content** to mixed-content websites, while using state resources, as long as that legislative content is also distributed more broadly to the press and public.
3. **Legislative staff may publish personal, business, or campaign material** to mixed-content websites only on personal time and without using state resources.
4. **Legislators** may post any type of content to any website at any time as long as they do not use state resources to post **campaign or business** content.

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