

**LEGISLATIVE REFERENCE BUREAU**

L.R.B. Form No. 4 (Rev. 1/11/17)

No. \_\_\_\_\_

**A Resolution adopting Financial  
Operating Rules of the Senate.**

**Legislative Reference Bureau**

**INTRODUCED** \_\_\_\_\_

By Williams, Lindsey M. District  
NO. \_\_\_\_\_

By \_\_\_\_\_ District  
NO. \_\_\_\_\_

By \_\_\_\_\_ District  
NO. \_\_\_\_\_

By \_\_\_\_\_ District  
NO. \_\_\_\_\_

See next page for additional co-sponsors.

Prior Session \_\_\_\_\_

**Referred to Committee on**

**Date** \_\_\_\_\_

**Reported** \_\_\_\_\_

**As Committed-Amended**

**Recomendation**  
\_\_\_\_\_

**By Hon.** \_\_\_\_\_

## A RESOLUTION

1 Adopting Financial Operating Rules of the Senate.

2 RESOLVED, That Financial Operating Rules of the Senate be  
3 adopted for the governing of the 207th and 208th Regular  
4 Session.

5 2023-2024

6 FINANCIAL OPERATING RULES OF THE SENATE

7 Rule 1. Personnel.

8 (a) Central office.--The office of the Chief Clerk of the  
9 Senate shall serve as the central office of the Senate for all  
10 personnel and payroll matters.

11 (b) Employees of the Senate.--

12 (1) Personnel files.--Before any individual is placed on  
13 any payroll of the Senate, there must be in the office of the  
14 Chief Clerk a payroll file containing:

15 (i) Full name of employee.

16 (ii) Full address.

17 (iii) Date of employment or job transfer.

1 (iv) Actual functional job title or description to  
2 include general hours of work, general job  
3 responsibilities and primary work location.

4 (v) The name of the Senator or Officer responsible  
5 for monitoring the employee's performance.

6 (vi) Notification of appointment signed by the  
7 authorizing Senator or Officer including a delineation of  
8 the account from which the employee is to be paid.

9 (vii) The current compensation level with signature  
10 approval of the authorizing Senator or Officer. Overtime  
11 payments may be authorized only in emergency maintenance  
12 and security situations with the signature approvals of  
13 the Senator or Officer responsible for monitoring  
14 performance, the authorizing Senator or Officer and the  
15 President Pro Tempore.

16 (viii) All information necessary for tax withholding  
17 and benefit eligibility.

18 (ix) Employment Eligibility Verification Form.

19 (2) Maintenance.--It is the responsibility of the Chief  
20 Clerk to develop procedures necessary to maintain this  
21 payroll file information on a current basis. All payroll  
22 changes shall be reflected by the next appropriate payroll  
23 period providing said change is received in the office of the  
24 Chief Clerk prior to processing of the payroll.

25 (3) Reclassification of employees.--Any reclassification  
26 of employees under the Senate of Pennsylvania Pay Management  
27 Plan shall be submitted by the Senator or Officer authorizing  
28 such reclassification to the Senate Committee on Management  
29 Operations for approval or disapproval. The Senate Committee  
30 on Management Operations is authorized to establish a

1 bipartisan subcommittee to consider and approve or disapprove  
2 all such requests subject to an appeal by the Senator or  
3 Officer for consideration of the reclassification by the  
4 Senate Committee on Management Operations.

5 (c) Contract for services.--

6 (1) Service contracts.--For any person retained on a  
7 contractual basis by any Officer or Senator to provide  
8 services, the following documents shall be filed with the  
9 office of the Chief Clerk:

10 (i) A copy of the contract signed by the authorizing  
11 Senator or Officer including:

12 (A) Full name, address and Federal tax  
13 identification number of the contractor.

14 (B) Duration of the contract.

15 (C) Maximum cost of the contract and terms of  
16 payment.

17 (D) Clear, detailed description of the type of  
18 service to be performed or product to be delivered.

19 (ii) The name of the Senator or Officer responsible  
20 for monitoring the contractor's performance.

21 (iii) Additional information as required by policies  
22 of the Senate Committee on Management Operations.

23 (2) Limitation on contracts.--Except as authorized by  
24 policies of the Senate Committee on Management Operations, no  
25 contract may extend beyond the expiration of the term of  
26 office of the Senator.

27 (3) Contract review.--All contracts for services shall  
28 be submitted to the Chief Clerk for review and approval  
29 regarding conformity with applicable laws, rules and policies  
30 adopted by the Senate Committee on Management Operations.

1 (4) Payment.--Payments under contract shall be made in  
2 accordance with provisions of the contract provided that a  
3 voucher for such payment is received in the office of the  
4 Chief Clerk before the applicable processing deadline.

5 Contractor performance shall be reviewed by the monitoring  
6 individual designated pursuant to paragraph (1)(ii), who  
7 under conditions of satisfactory performance and conformity  
8 to the contract shall approve the voucher prior to  
9 processing.

10 (d) Authorized accounts.--Salaries, wages and related  
11 benefits shall be paid from accounts so authorized by the  
12 General Appropriation Act. The authorized accounts may pay  
13 expenses related to contracts for services.

14 Rule 2. Travel allowances and reimbursements.

15 (a) Senator travel.--Travel allowances or reimbursements may  
16 be paid to a Senator who is engaged in travel in the performance  
17 of legislative duties. Except as provided in subsection (c),  
18 Senators are not authorized to lease vehicles on a long-term  
19 basis and no payments will be made with respect to long-term  
20 lease vehicle expenses incurred by Senators. Travel payments may  
21 be claimed in connection with the following:

22 (1) Mileage between home district and Harrisburg for  
23 attendance at a session of the Senate.

24 (2) Round trip travel between home district and  
25 Harrisburg for other legislative activities.

26 (3) All travel in the Commonwealth for legislative  
27 business.

28 (4) All travel to attend committee meetings, hearings,  
29 conferences and seminars.

30 (b) Employee travel.--Travel reimbursement may be paid to

1 employees engaged in travel while away from their primary  
2 workplace provided that the travel is necessary for the  
3 performance of official business. Except as provided in  
4 subsection (c), employees are not authorized to lease vehicles  
5 on a long-term basis, and no payments will be made with respect  
6 to long-term lease vehicle expenses incurred by employees. When  
7 away from the Harrisburg area and from their workplace,  
8 employees may, subject to approval of the supervising Senator or  
9 officer, rent cars on a short-term basis for a period not in  
10 excess of that needed to carry out official business.

11 (c) Rental of vehicle or conveyance.--

12 (1) Short-term rental of vehicle or conveyance.--A

13 Senator whose Senate-provided leased vehicle is unavailable  
14 may be reimbursed the actual legislative percentage expenses  
15 for a short-term rental. A Senator or employee who rents a  
16 vehicle or conveyance on a short-term basis, other than a  
17 Senator's temporary replacement of a Senate-provided leased  
18 vehicle, may be reimbursed only on an actual cost basis for  
19 the legislative percentage of rental payments and expenses of  
20 operation.

21 (2) Long-term vehicle rental by Chief Clerk.--The Chief

22 Clerk is authorized to enter into a master lease agreement  
23 with the Department of General Services for the long-term  
24 lease of automobiles to be used by Senators and in the  
25 operation of the Senate. The actual expenses of the lease and  
26 operation shall be paid by the Senate's Incidental Expense  
27 Account.

28 (d) Allowable transportation expenses.--

29 (1) Common or chartered carrier.--A Senator or employee

30 may be reimbursed for reasonable actual costs of carriage

1 when traveling by common or chartered carrier, including  
2 expenses for parking, taxis, limousines and tolls. Claims for  
3 payment based on miles traveled cannot be paid.

4 (2) Personal vehicle or conveyance.--A Senator or  
5 employee who uses a personal vehicle may be reimbursed on  
6 such mileage basis as may be established by the Senate  
7 Committee on Management Operations. Reimbursement for use of  
8 other noncommercial vehicles or noncommercial aircraft shall  
9 be made on such basis as may be established by the Senate  
10 Committee on Management Operations.

11 (3) Out-of-State travel.--

12 (i) Nonmember Officers of the Senate and their  
13 employees may claim expenses for travel outside the  
14 Commonwealth, provided that such travel is approved in  
15 the manner described in Rule 11. All claims for Senators'  
16 and employees' travel outside the Commonwealth shall be  
17 filed with the Office of the Chief Clerk in the manner  
18 described in Rule 11.

19 (ii) Senators and their employees may claim ordinary  
20 and necessary expenses for travel outside the  
21 Commonwealth provided that the travel is necessary to  
22 attend a conference, seminar or meeting regularly or  
23 specially scheduled by an organization which conference,  
24 seminar or meeting has a legislative purpose. Senators  
25 and their employees shall submit a copy of a registration  
26 and agenda, in addition to any other documentation  
27 required by these rules.

28 (iii) Senators may also claim ordinary and necessary  
29 expenses for travel outside the Commonwealth when the  
30 travel has a legislative purpose, but is not for

1 attending a conference, seminar or meeting, provided the  
2 purpose is approved by the Senate Committee on Management  
3 Operations, and provided further that approval is not  
4 required for legislative business in Washington, DC.

5 (4) No duplication.--If a Senator or employee is  
6 entitled to reimbursement from more than one source for  
7 legislative business performed on behalf of more than one  
8 committee or group, payment shall be received from only one  
9 source.

10 (e) Documentation.--

11 (1) Expense voucher.--All requests for travel payments  
12 must be made on an expense voucher showing:

13 (i) Dates of travel.

14 (ii) Legislative purpose of travel described in  
15 reasonable specificity. Claims for out-of-State travel  
16 shall also include such information as may be required  
17 under subsection (d) (3).

18 (iii) The number of miles traveled when claiming  
19 reimbursement on a mileage basis. Such mileage claims  
20 also should reflect an itinerary including point of  
21 origin, furthest destination, and intermediate points and  
22 the legislative purpose of the trips.

23 (2) Receipts.--Receipts must be submitted to support the  
24 cost associated with claims for:

25 (i) Travel by common or chartered carrier.

26 (ii) Leased vehicle or conveyance operation.

27 Receipts for gasoline and maintenance shall include the  
28 license number of the vehicle and the location of the  
29 purchase.

30 (iii) Parking, limousine, toll charges and other



1 miscellaneous incidental items when any of these items  
2 exceeds \$25.

3 (f) Authorized accounts.--Travel payments can be made from  
4 any of the following accounts. Long-term vehicle or conveyance  
5 rental payments may be made from all accounts except paragraph  
6 (5). Authorized accounts are:

7 (1) Appropriations Committee Accounts.

8 (2) Senators' Legislative Accountable Expense Accounts.

9 (3) Incidental Expense Account.

10 (4) Caucus Operations Accounts.

11 (5) Committee and Contingent Expenses Accounts.

12 (6) Computer Services Accounts.

13 Rule 3. Meals and lodging.

14 (a) General.--A Senator may receive payments attributable to  
15 ordinary and necessary expenses for meals, lodging and  
16 incidental items provided that the Senator is engaged in the  
17 performance of legislative duties. Depending on the nature and  
18 location of the activity, as explained below, payments may be  
19 made in one of the following forms: per diem allowance or  
20 reimbursement for actual costs incurred.

21 (b) Per diem allowance.--

22 (1) A per diem allowance is an allowance for meals and  
23 lodging expenses incurred in the course of a Senator's  
24 duties. It is paid in lieu of reimbursement for actual  
25 expenses in accordance with Internal Revenue Service  
26 regulations. A Senator is entitled to receive a full or  
27 partial per diem allowance for each day the Senator is in the  
28 performance of legislative duties while in the Harrisburg  
29 area (defined as within Dauphin County or otherwise within a  
30 10-mile radius of the Capitol) or elsewhere in the

1 Commonwealth but away from home. Specific legislative duties  
2 include attendance at sessions of the Senate, attendance at  
3 official committee meetings and participation in all other  
4 activities necessary or appropriate to the carrying out of  
5 the responsibilities of the Senator. Payment of a per diem  
6 allowance is authorized only when the legislative duties  
7 performed by the Senator occur more than 50 miles from the  
8 Senator's residence.

9 (2) Types of per diem allowance.--

10 (i) A full per diem allowance not to exceed such  
11 amount as may be established by the Senate Committee on  
12 Management Operations may be claimed as an allowance for  
13 meals and lodging and is in lieu of reimbursement for  
14 actual expenses.

15 (ii) When the per diem entitlement derives from the  
16 performance in the Harrisburg area of the specified  
17 legislative duties set forth in paragraph (1), a Senator  
18 may receive a partial per diem allowance in accordance  
19 with policy established by the Senate Committee on  
20 Management Operations for meals and incidentals.

21 (c) Actual costs.--A Senator may claim actual costs for  
22 lodging, meals and other incidental items incurred in the  
23 performance of legislative duties in lieu of a per diem  
24 allowance. Expense claims for costs of lodging, meals and other  
25 incidental expenses incurred in the performance of legislative  
26 duties outside of the Commonwealth may be reimbursed on an  
27 actual expense basis or through a per diem allowance.

28 (d) Employees' travel.--If an employee is engaged in travel  
29 away from the normally assigned place of work necessary for the  
30 performance of official business, the employee may be reimbursed

1 for ordinary and necessary actual expenses for lodging, meals  
2 and other incidental items. For rules regarding out-of-State  
3 travel, see Rule 11.

4 (e) Payment from one source.--If a Senator is entitled to a  
5 meal and lodging claim from more than one source for legislative  
6 business performed on behalf of more than one committee or  
7 group, payments shall be received from only one source.

8 (f) Review.--All authorized and approved meals and lodging  
9 claims shall be reviewed for inadvertent duplication by the  
10 Office of the Chief Clerk prior to processing and payment.

11 (g) Recordkeeping.--Where a per diem allowance or  
12 reimbursement is paid by a legislative service agency cofunded  
13 between both Houses of the General Assembly, a copy of the  
14 approved claim shall be furnished to the Office of the Chief  
15 Clerk.

16 (h) Documentation.--

17 (1) Per diem allowance.--For payment of a per diem  
18 allowance, a Senator must submit a voucher showing the date,  
19 the legislative activity in which the Senator was engaged on  
20 that date, the location of the activity and an affirmative  
21 statement that the Senator incurred overnight lodging  
22 expense.

23 (2) Actual expenses of a Senator or an employee.--For  
24 payment of actual expenses, a Senator or employee must submit  
25 a voucher showing the date, amount, place and the legislative  
26 activity in which the Senator or employee was engaged and  
27 must submit a vendor or credit card receipt or invoice for  
28 each item exceeding \$10. Tips for meals may not exceed 20% of  
29 the value of the meal.

30 (i) Authorized accounts.--

1           (1) Payments shall be made from the Incidental Expense  
2 Account for authorized per diem allowances only for sessions  
3 of the Senate during which a Senator is recorded as present  
4 on any roll call vote.

5           (2) Payment may be made from the following accounts for  
6 other authorized per diem, meal and lodging claims:

7           (i) Appropriations Committee Accounts.

8           (ii) Senators' Legislative Accountable Expense  
9 Accounts.

10          (iii) Incidental Expense Account.

11          (iv) Caucus Operations Accounts.

12          (v) Committee and Contingent Expenses Accounts.

13          (vi) Computer Services Accounts for actual expenses  
14 only.

15 Rule 4. Equipment and furnishing control and inventory.

16          (a) Purchases, improvements and renovations.--The Office of  
17 the Chief Clerk shall act as the sole agent for improvements or  
18 renovations to Senate facilities at the Capitol Complex and for  
19 the purchase, rental, control and inventory of durable  
20 equipment, furniture and furnishings with a useful life of one  
21 year or more and a cost greater than the limit established by  
22 the Senate Committee on Management Operations for utilization in  
23 both the Capitol and District Offices. Nonrecoverable items  
24 including, but not limited to, carpeting, draperies and air  
25 conditioners for use in and improvements or renovations to  
26 district office facilities shall be purchased pursuant to  
27 standards developed by the Senate Committee on Management  
28 Operations.

29          (b) Approval of purchase or rental.--All requests for the  
30 purchase or rental of such equipment, furniture and furnishings

1 must be reviewed and approved by the Chief Clerk.

2 (c) Senate inventory.--All approved requests shall be  
3 processed by the Office of the Chief Clerk, which shall maintain  
4 a full and current inventory of all durable equipment, furniture  
5 and furnishings secured on behalf of a Senator, Officer or  
6 employee of the Senate.

7 (d) Pricing and service.--The Chief Clerk shall take all  
8 necessary and reasonable steps to ensure that the purchase or  
9 rental of durable equipment, furniture and furnishings with a  
10 useful life of one year or more and a cost greater than the  
11 limit established by the Senate Committee on Management  
12 Operations shall be transacted at the lowest available price for  
13 the quality, compatibility, availability and service of the  
14 items being purchased or leased.

15 (e) Documentation required.--Required documentation shall  
16 include:

- 17 (1) Request for purchase or rental showing:
- 18 (i) Date of request.
  - 19 (ii) Item requested.
  - 20 (iii) By whom request made.
  - 21 (iv) Purpose.
  - 22 (v) Signature approvals.
  - 23 (vi) Record of subsection (d) actions taken.
- 24 (2) Vendor's invoice or receipt detailing:
- 25 (i) Date of purchase or rental.
  - 26 (ii) Vendor's identity.
  - 27 (iii) Description of item purchased or rented.
  - 28 (iv) Length of rental contract when applicable.
  - 29 (v) Cost and payment terms of the purchase or  
30 rental.

1 (f) Authorized accounts.--Authorized accounts shall include:

2 (1) Legislative and Printing Expense Account.

3 (2) Computer Services Accounts.

4 (3) Senators' Legislative Accountable Expense Accounts.

5 (4) Chief Clerk Employees' Salary and Expense Account.

6 Rule 5. District office expenses.

7 (a) Authorized expenses.--Expenses authorized shall include:

8 (1) Aggregate office rental in accordance with policies  
9 as may be established by the Senate Committee on Management  
10 Operations. No Senator, nor a member of the Senator's  
11 immediate family, may have a financial interest in a district  
12 office. For purposes of this paragraph, a financial interest  
13 shall not include ownership in a publicly traded investment  
14 vehicle, including a corporation, mutual fund, REIT or  
15 limited liability partnership in which the Senator or a  
16 member of the Senator's immediate family is not a managing  
17 partner. Prior to entering into a district office lease  
18 agreement, the Chief Clerk shall obtain and maintain a  
19 written verification from the Senator that neither the  
20 Senator nor a member of the Senator's immediate family has a  
21 financial interest in the property. This Rule shall not  
22 prohibit a district office from being located in a building  
23 in which a Senator or a member of the Senator's immediate  
24 family has a financial interest if rent, utilities or any  
25 expenses that may inure to the benefit of the property or  
26 landlord are not paid for by the Senate.

27 (2) Insurance.

28 (3) Printing services.

29 (4) Telephone and data services.

30 (5) Postage and mailing services.

- 1 (6) Publications and subscriptions.
- 2 (7) Nondurable supplies.
- 3 (8) Senator, employee and visitor parking.
- 4 (9) Janitorial maintenance and cleaning services.
- 5 (10) Utility services.
- 6 (11) Other items authorized for expenses as defined in
- 7 the General Appropriations Act and policies of the Senate
- 8 Committee on Management Operations.

9 (b) Documentation required.--A copy of the district office  
10 lease indicating the amount and payment terms shall be  
11 maintained in the Office of the Chief Clerk. Vouchers shall  
12 appropriately document expenses and legislative purpose for each  
13 expenditure. Receipts or invoices shall be included for all  
14 expenditures in excess of \$25 per occurrence.

15 (c) Authorized accounts.--Accounts authorized include:

- 16 (1) Senators' Legislative Accountable Expense Accounts.
- 17 (2) Chief Clerk Employees' Salary and Expense Account.
- 18 (3) Legislative and Printing Expense Account.
- 19 (4) Computer Services Accounts.
- 20 (5) Caucus Operations Accounts.
- 21 (6) Postage and Communication Expense Account of the
- 22 Chief Clerk.

23 Rule 6. Capitol office expenses.

24 (a) Types of expenses authorized.--Expenses authorized shall  
25 include:

- 26 (1) Utility services.
- 27 (2) Insurance.
- 28 (3) Printing services.
- 29 (4) Telephone and data services.
- 30 (5) Postage and communication.

- 1 (6) Publications and subscriptions.
- 2 (7) Nondurable supplies.
- 3 (8) Employee parking.
- 4 (9) Janitorial maintenance and cleaning services.
- 5 (10) Other items authorized for expenses as defined in
- 6 the General Appropriations Act and policies of the Senate
- 7 Committee on Management Operations.

8 (b) Documentation required.--Documentation required shall  
9 include vouchers appropriately documenting expenses and  
10 legislative purpose for each expenditure. Receipts or invoices  
11 shall be included for all expenditures in excess of \$25 per  
12 occurrence.

13 (c) Authorized accounts.--Accounts authorized include:

- 14 (1) Legislative Printing and Expense Account.
- 15 (2) Postage and Communication Expense Account of the
- 16 Chief Clerk.
- 17 (3) Senators' Legislative Accountable Expense Accounts.
- 18 (4) Appropriations Committee Accounts.
- 19 (5) Caucus Operations Accounts.
- 20 (6) Committee and Contingent Expenses Accounts.
- 21 (7) Incidental Expense Account.
- 22 (8) Computer Services Accounts.

23 Rule 7. Official expenses.

24 (a) General.--While engaged in the performance of  
25 legislative duties, a Senator, Officer or employee expressly  
26 authorized by a Senator may claim actual expenses as set forth  
27 below.

28 (b) Participation in conferences and seminars.--Expenses,  
29 such as registration fees, incurred in participating in  
30 legislative conferences and seminars may be claimed. Related



1 travel expenses incurred are discussed in Rule 2. Related meals  
2 and lodging expenses incurred are discussed in Rule 3.

3 (c) Conducting meetings.--Expenses attributable to  
4 conducting legislative meetings or performing official duties  
5 may be claimed. Such expenses may include:

6 (1) Food and refreshment which are ordinary to the  
7 performance of a Senator's legislative duties, and for which  
8 there is a legislative purpose. In general, these expenses  
9 will be incurred during, immediately preceding or immediately  
10 following a substantial and bona fide legislative business  
11 discussion.

12 (2) Meeting room rental.

13 (3) Incidental items.

14 (d) Documentation.--

15 (1) Participation in conferences and seminars.--Vouchers  
16 shall show the amount, date, place and legislative purpose.  
17 An agenda, and a registration form or other receipts, must be  
18 attached.

19 (2) Meeting expenses.--Vouchers of meeting expenses  
20 shall include documentation regarding the amount, date, place  
21 and legislative purpose. If a meeting expense is claimed by a  
22 Senator or employee, the portion of the voucher amount  
23 attributable to that Senator or employee shall be indicated.  
24 A receipt or invoice shall be attached to the voucher.

25 (3) Official duty expenses.--Vouchers shall show or  
26 reference to records which show the amount, date, place,  
27 legislative purpose and if claimed by a Senator or employee,  
28 the portion of the expense amount attributable to the Senator  
29 or employee. Restaurant, hotel or credit card receipt or  
30 invoices must be attached.

1 (4) Claims by Senate employees.--Vouchers involving any  
2 official expenses claimed by Senate employees shall reflect  
3 formal authorization by the supervising Senator or Officer.

4 (e) Authorized accounts.--Payments shall be made from the  
5 following accounts:

6 (1) Appropriations Committee Accounts.

7 (2) Incidental Expense Account.

8 (3) Caucus Operations Accounts.

9 (4) Committee and Contingent Expenses Accounts.

10 (5) Senators' Legislative Accountable Expenses Accounts.

11 (6) Computer Services Accounts.

12 Rule 8. Special expenses.

13 (a) Authorized expenses.--Expenses authorized include:

14 (1) Flowers, baskets of fruit or other appropriate items  
15 or memorial contributions to designated charities not to  
16 exceed the amount established by the Senate Committee on  
17 Management Operations. Recipients are limited to instances of  
18 death or serious illness for Senators, Officers, employees or  
19 their immediate families, or former Senators or their  
20 immediate families, or deceased retired Senate employees, or  
21 dignitaries including both incumbent or former elected or  
22 appointed officials or their immediate families.

23 (2) Rental of common carrier and other expenditures  
24 inherent thereto for attendance at funerals of a Senator or  
25 members of a Senator's immediate family, former Senators,  
26 dignitaries, or Officers.

27 (b) Documentation required.--Required documentation shall be  
28 submitted by a member of leadership or nonmember officer and  
29 shall include a receipt or vendor invoice showing: recipient,  
30 instance, description of items delivered, date delivered and

1 cost.

2 (c) Authorized accounts.--Payment shall be made only from  
3 the Incidental Expense Account.

4 Rule 9. Miscellaneous expenses of standing and special  
5 committees.

6 (a) Committee proceedings.--Rental of meeting rooms and  
7 hearing facilities and payments to qualified court reporters or  
8 stenographers to record the proceedings authorized by the  
9 chairman of a standing or special committee of the Senate,  
10 including the cost of transcripts. Witnesses served with a  
11 subpoena to testify before such proceedings shall be paid  
12 witness fees and travel expenses as provided by Section 5903 of  
13 the Judicial Code.

14 (b) Printing and mailing.--Committee printing and mailing  
15 costs for mailings relating to legislative business.

16 (c) Publications and subscriptions.--Publications and  
17 subscriptions.

18 (d) Documentation required.--Vouchers or vendor receipts or  
19 invoices stating vendor's name, services or amount of postage,  
20 date, place, and total amount due or paid. Postage purchases  
21 shall require a receipt from the Postmaster.

22 (e) Authorized accounts.--Accounts authorized include:

23 (1) Appropriations Committee Accounts.

24 (2) Caucus Operations Accounts.

25 (3) Committee and Contingent Expenses Accounts.

26 Rule 10. Senate Committee on Management Operations.

27 (a) Duties.--In addition to duties imposed by law or  
28 otherwise by these rules, the duties of the Senate Committee on  
29 Management Operations shall be:

30 (1) To arbitrate a decision of the Chief Clerk of the

1 Senate relating to these Rules, in the event that a Senator,  
2 Officer or employee shall disagree with a decision of the  
3 Chief Clerk of the Senate.

4 (2) To make a final decision in case of a dispute on a  
5 question of legislative intent or legislative purpose  
6 regarding an expenditure.

7 (3) To make a continuing review of these Rules as to  
8 expenditures and the reporting of expenditures, and, from  
9 time to time, to make such recommendations as are  
10 appropriate.

11 (4) To adopt clarifications to these Rules through  
12 interim policy determinations.

13 (b) Records.--A record of the committee's decisions shall be  
14 maintained. The Chief Clerk shall be responsible for maintaining  
15 such records.

16 Rule 11. Out-of-State travel.

17 (a) Request for approval.--No nonmember Officer of the  
18 Senate or any employee of any nonmember Officer shall be  
19 reimbursed nor shall any of his or her expenses be paid for any  
20 travel outside the Commonwealth unless such travel has been  
21 approved by the Executive Committee or a majority of the  
22 membership of the Senate Committee on Management Operations. All  
23 requests for such approval shall be made to the Chief Clerk, and  
24 shall include information relating to the destination, the  
25 estimated cost of such travel, the number of days involved, and  
26 the relationship that the travel has to the duties of the  
27 Officer or employee making the request. In the case of an  
28 employee, the request shall also be approved by the Officer.

29 (b) Time limit for filing.--A copy of any request for  
30 reimbursement or for the payment of any expenses relating to

1 out-of-State travel by a Senator or employee assigned to a  
2 Senator shall be filed with the Office of the Chief Clerk within  
3 30 days of such travel. Copies of these requests shall be made  
4 available for public inspection in the Office of the Chief Clerk  
5 in accordance with the act of February 14, 2008 (P.L.6, No.3),  
6 known as the Right-to-Know Law.

7 Rule 12. List of employees and document access.

8 (a) Publication and distribution.--

9 (1) The Chief Clerk shall publish quarterly a listing of  
10 all employees of the Senate and its Officers, Committee  
11 Chairmen, and Senators and all persons holding contracts for  
12 services with the Senate or any of its Officers, Committee  
13 Chairmen and Senators. The list for employees shall contain  
14 the full name of the employee, the job title of the employee,  
15 the compensation of the employee, and the name of the Senator  
16 or Officer for such employee. For persons holding contracts  
17 for services with the Senate, the list shall contain the name  
18 of the contractor, the address of the contractor, a statement  
19 of the nature of the duties of the contractor, and the fee of  
20 the contractor as well as the name of the Senator or Officer  
21 responsible for monitoring the performance of the contractor.

22 (2) The list shall be published by February 1, for the  
23 quarter ending December 31; by May 1, for the quarter ending  
24 March 31; by August 1, for the quarter ending June 30; and by  
25 November 1, for the quarter ending September 30. The list  
26 shall be available for public inspection in the Office of the  
27 Chief Clerk in accordance with the act of February 14, 2008  
28 (P.L.6, No.3), known as the Right-to-Know Law.

29 (b) Public inspection of vouchers and requisitions.--All  
30 vouchers and requisitions relating to all expenditures,

1 expenses, disbursements and other obligations out of all  
2 appropriated funds of the Senate shall be available for public  
3 inspection in accordance with the act of February 14, 2008  
4 (P.L.6, No.3), known as the Right-to-Know Law. Payroll and  
5 contracts for services shall also be made available for public  
6 inspection in accordance with the Right-to-Know Law.

7 (c) Copies of records.--Copies of financial records  
8 maintained in the Office of the Chief Clerk shall be made  
9 available in accordance with the act of February 14, 2008  
10 (P.L.6, No.3), known as the Right-to-Know Law.

11 (d) Quarterly posting.--The following apply:

12 (1) In addition to any other duty imposed on the Chief  
13 Clerk under these rules, the Chief Clerk shall post a  
14 quarterly list of the following expenses of the Senate on a  
15 publicly accessible Internet website:

16 (i) Per diems for each member of the Senate.

17 (ii) Travel allowances and reimbursements made under  
18 Rule 2.

19 (iii) Meals and lodging expenses made under Rule 3.

20 (iv) Equipment and furnishing control and inventory  
21 expenses made under Rule 4.

22 (v) District office expenses made under Rule 5.

23 (vi) Capitol office expenses made under Rule 6.

24 (vii) Official expenses made under Rule 7.

25 (viii) Special expenses made under Rule 8.

26 (ix) Miscellaneous expenses of standing and special  
27 committees made under Rule 9.

28 (2) The following information shall be included on the  
29 list of expenses required under paragraph (1):

30 (i) The member or individual for whom the expense

1 was submitted, paid and reimbursed.

2 (ii) The date the expense was incurred, submitted,  
3 paid and reimbursed.

4 (iii) The legislative purpose for the expense.

5 (iv) The account from which the expense was paid or  
6 reimbursed.

7 (3) The list of expenses required under paragraph (1)  
8 shall be in a format that is searchable by name, office,  
9 account, date and any other format authorized by the Senate  
10 Committee on Management Operations.

11 Rule 13. Personnel policies.

12 (a) Preparation of rules and regulations.--The Senate  
13 Committee on Management Operations created pursuant to Section  
14 1.1 of Act No. 417 of 1967 is authorized to prepare and adopt  
15 rules and regulations for uniform personnel policies and  
16 procedures, job specification and pay plans including periodic  
17 increments for Senate Officers and employees.

18 (b) Approval of rules and regulations.--Each such rule or  
19 regulation or any amendment thereto shall be prepared in  
20 resolution form and shall be placed on the Senate calendar for  
21 final approval or disapproval. The committee may when approved  
22 by at least five Members of the committee including both Floor  
23 Leaders implement such rules and regulations pending final  
24 Senate consideration of them. Such resolution shall have the  
25 force and effect of law in accordance with its terms when it has  
26 been approved by the full Senate.

27 Rule 14. Operations Manual.

28 (a) Preparation and approval.--The Chief Clerk shall prepare  
29 an Operations Manual of all rules, regulations, policies and  
30 procedures which are promulgated by the Senate Committee on

1 Management Operations.

2 (b) Distribution.--Upon approval, applicable sections of the  
3 Operations Manual shall be posted on the Chief Clerk's Intranet  
4 site for access by all Senators, Senate Officers and Senate  
5 employees.

6 (c) Maintenance and updating.--The Chief Clerk shall be  
7 responsible for maintaining and updating this manual as a result  
8 of revisions or amendments promulgated by the Senate Committee  
9 on Management Operations.

10 Rule 15. Effect and duration.

11 (a) Current policies.--Policies of the Senate Committee on  
12 Management Operations in effect on the date of the adoption of  
13 these rules are hereby ratified and approved by the Senate.

14 (b) Applicability.--These rules provide guidance to  
15 Senators, Senate Officers and Senate employees in performing  
16 their duties in the Senate. The changes contained in these rules  
17 are to be applied prospectively and are not intended to reflect  
18 on the propriety of past rules or practices of the Senate or its  
19 Senators, Officers or employees.

20 (c) Rules.--These rules shall be in full force and effect  
21 until altered, changed, amended or repealed as provided in Rule  
22 16.

23 Rule 16. Changes to rules.

24 The consent of a majority of the Senators elected shall be  
25 necessary to alter, change or amend these rules.

26 Rule 17. Procedure for changing rules.

27 All alterations, changes or amendments to these rules shall  
28 be by resolution which shall not be considered until first  
29 referred to and reported from the Committee on Rules and  
30 Executive Nominations.