



LAKE COUNTRY SCHOOL  
**WILDCATS**



## **2024 SPRING ELECTION**

April 2, 2024

Packet for candidates for the  
(2) School Board of Education Seats

# SCHEDULE AT-A-GLANCE

# 2024 SPRING ELECTION

## NOVEMBER 2023

- 28
  - Deadline for Publication of Type A Notice of Election
- On or About 28
  - Prepare Packet of Information for Potential Candidates

## DECEMBER

- 1
  - Earliest Date for Circulation of Nomination Papers, If Required  
(NOTE: Nomination Papers Are Not Required in Many School Districts)
- 1 - Jan. 2
  - Most Candidates Will File Campaign Registration Statements, Declarations of Candidacy, and Nomination Papers (If Required) During this Period
- 22
  - Deadline for Incumbents to File Notice of Noncandidacy (5:00 p.m.)
  - Deadline for Clerk to Give Public Notice of Incumbent Noncandidacy (If Any)
- On or About 31
  - Clerk Notifies Non-Exempt Committees of Deadline for Filing Campaign Finance January Continuing Report (for Period Ending December 31)

## JANUARY 2024

- 2
  - Candidate Deadline for Filing All Ballot Access Documents (5:00 p.m.)
  - Clerk Makes Initial Determination of Candidates' Eligibility for Ballot (The Sufficiency of Filings Should be Evaluated on a Rolling Basis)
  - Only If Applicable, Clerk Gives Public Notice of 72-Hour Filing Extension
- 9
  - Drawing of Lots for Ballot Order; Certify Ballot Eligibility to County Clerk(s)
  - When a Primary is Required, Notice to Municipal Clerks of Primary Election
- 16
  - Deadline for Non-Exempt Committees to File January Continuing Report
- 17
  - Clerk Performs Duties with Respect to Campaign Finance Reports that Have Been Filed or that Are Delinquent
- On or Before 29
  - If Primary Election is Being Held, Provide Municipal Clerk with Ballots (If Separate Paper Ballots Are Utilized)

## FEBRUARY

- On or About 5
  - If Primary Election is Being Held, Clerk Notifies Non-Exempt Committees of Deadline for Filing Preprimary Campaign Finance Report
- 6 - 12
  - Deadline for Non-Exempt Committees to File Preprimary Report
- 13
  - Clerk Performs Duties with Respect to Campaign Finance Reports that Have Been Filed or that Are Delinquent
- 16
  - Write-in Candidate Registration Deadline for Primary Election (12:00 p.m.)
- On or Before 19
  - If Primary Election is Being Held, Choose Board of Canvassers
- 19
  - If Primary Election is Being Held, Publication of Notice of Primary Election (May Occur Earlier If the Newspaper Does Not Publish on Mondays)
- 20
  - Spring Primary Election
- On or About 20
  - If Primary Election Held, Issue Open Meetings Law Notice of Board of Canvassers Meeting(s)
- On or About 21
  - If Primary Election Held, Receipt of Election Materials and Related Duties

## **FEBRUARY** *(continued)*

- On or About 21 - 27
  - If Primary Election Held, Canvass of Primary Returns and Written Determination of Primary Results
- On or About 21 to March 1
  - If Primary Election Held, Recount Request May Be Filed by a Qualifying Aggrieved Party (If any)
- On or About 22 to March 1
  - If Primary Election Held, Drawing of Lots for Ballot Order
  - If Primary Election Held, Certify Nominations and Ballot Order to County Clerk(s)

## **MARCH**

- On or Before 11
  - Provide Municipal Clerk with Ballots (If Separate Paper Ballots Are Utilized)
- On or About 18
  - Clerk Notifies Non-Exempt Committees of Deadline for Filing Preelection Campaign Finance Report
- 19 - 25
  - Deadline for Non-Exempt Committees to File Preelection Report
- 26
  - Clerk Performs Duties with Respect to Campaign Finance Reports that Have Been Filed or that Are Delinquent
- 29
  - Write-in Candidate Registration Deadline for Spring Election (12:00 p.m.)

## **APRIL**

- On or Before 1
  - Choose Board of Canvassers (Consider Appointing Canvassers Multiple Weeks in Advance)
- 1
  - Newspaper Publication of the Notice of Spring Election (May Occur Earlier if the Newspaper Does Not Publish on Mondays)
- 2
  - Spring Election
- On or About 2
  - Issue Open Meetings Law Notice of Board of Canvassers Meeting(s)
- After 2
  - Some Campaign Committees May File a Campaign Finance Termination Report
- On or About 3
  - Receipt of Election Materials and Other Related Duties
- 3 - 9
  - Canvass of Election Returns and Written Determination of Election Results
- On or About 3 - 12
  - Recount Request May Be Filed by a Qualifying Aggrieved Party (If any)
- On or About 3 - 12
  - Clerk Issues Certificate(s) of Election
  - Clerk Notifies Municipal and County Clerks of School District Officers
- On or Before 22
  - School Board Members Take and File Official Oath
- 22
  - School Board Members Take Office
- 22 - May 22
  - Election of School Board Officials (i.e. Board Officers)

## **JUNE**

- On or About June 30
  - Clerk Notifies Non-Exempt Committees of Deadline for Filing Campaign Finance July Continuing Report (for Period Ending June 30)

## **JULY**

- 15
  - Deadline for Non-Exempt Committees to File July Continuing Report
- 16
  - Clerk Performs Duties with Respect to Campaign Finance Reports that Have Been Filed or that Are Delinquent



Lake Country School District  
1800 Vettelson Road, Hartland, WI 53029  
Phone: 262-367-3606 | FAX: 262-367-3205  
[www.mylakecountryschool.org](http://www.mylakecountryschool.org)

## Memo to School Board Candidates

Two seats will be on the ballot to elect Lake Country School Board Members. The spring election is held on the first Tuesday in April, [Wis. Stat. 5.02\(21\)](#), which is Tuesday, April 2, 2024. Winners of these seats will serve three-year terms beginning on Monday, April 22, 2024, and expiring on Sunday, April 25, 2027.

Candidates are required to file a Campaign Finance Registration Statement (CF-1L) and a Declaration of Candidacy (EL-162SD by 5:00 p.m. on Tuesday, January 2, 2024. The District Office located at 1800 Vettelson Road, Hartland, WI 53029 shall be the designated filing location for all forms, petitions, oaths of office, and other filings related to Board elections. The District Office is open Monday-Friday from 7:30 a.m. to 4:00 p.m. The filing office will be closed from November 22-24, 2023, and from December 25, 2023, through January 1, 2024. The filing office will be open until 5:00 p.m. on Tuesday, January 2, 2024, for the candidate filing deadline. Original forms must be filed with the Filing Officer; Nicole Brown, 262.367.3606 x108, [brownn@mylakecountryschool.org](mailto:brownn@mylakecountryschool.org). Contact information for the Board Clerk, Steve Maurer is 414.587.6866, [maurersteve@mylakecountryschool.org](mailto:maurersteve@mylakecountryschool.org).

Forms and Manuals published by the [Wisconsin Ethics Commission](#) (campaign finance) and the [Wisconsin Elections Commission](#) (Local Candidate>Non-Partisan>School District Candidates) for the making of reports and statements under the campaign finance laws are available on the following websites, and copies of such forms and certain manuals will be made available to candidate committees at no charge upon request:

<http://elections.wi.gov/forms> - 608-266-8005

<http://ethics.wi.gov/forms> - 608-266-8123

A packet is available to pick up from the District Office and contains the following documents:

- Memo to School Board Candidates
- [ELIS-5 SD Ballot Access Checklist for 2024 School District Candidates \(Rev. 2023-5\)](#)  
(NOTE: Nomination Papers are not required for the Lake Country School Board Candidates)
- [EL-162sd Declaration of Candidacy SD Candidates \(Rev. 2019-08\) Fillable.pdf](#)
- [CF-1L Campaign Finance Registration Statement - Local Candidate Fillable PDF](#)
- [ETIS-8 Campaign Finance Checklist for 2024 School District Candidates](#)
- [Campaign Finance Overview - Local Candidate Committees \(September 2023\)](#)
- [2024 Guide for Candidates](#) from Wisconsin Association of School Boards (WASB)
- Time Commitment of a Board of Education Member/Current Board of Education Contacts
- [Policies](#) - 110, 131, 141, 141 Rule, 150, 163, 165, 170, 185
- Lake Country School District's Annual Meeting Packet



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1800 Vettelson Road, Hartland, WI 53029  
Phone: 262-367-3606 | FAX: 262-367-3205  
[www.mylakecountryschool.org](http://www.mylakecountryschool.org)

### Who is eligible to be a school board candidate?

A school board candidate is non-partisan which means the candidate does not run as a member of a political party. The minimum qualifications to hold an office are:

- United States Citizenship
- At least 18 years of age (or older for certain offices)
- A candidate for school district office must be a qualified elector of the school district at the time of filing a Declaration of Candidacy (EL- 162sd). Wis. Stats. §§ 120.05(1)(d), 120.06(2), (6)(b)2, 120.06(7)(a). Therefore, a candidate for school board must have satisfied the 28-day residency requirement before filing.
- May not have been convicted of a felony in any court in the United States unless pardoned of the conviction.
- Candidate may not be disqualified by virtue of one or more of the impediments described in s [6.03](#), Wis. Stats.

### Primary Election

If there are more than four candidates that file for the open seats, the spring primary is held on the third Tuesday in February [Section 5.02\(22\)](#), which is Tuesday, February 20, 2024. The four highest-ranking candidates from the Primary Election will have their names placed on the ballot for the Spring Election.

### Candidate Profile

Candidates will be asked to provide a link to candidate information to be posted on our District's website and available to the community.

### Campaigning, Campaign Signs, Handouts/Flyers, and Mailers

To remain neutral in the candidate selection process and to protect the use of our District logo and brand, use of the district logo is not allowed.

Please review sign ordinances for the City of Delafied, Town of Delafied, Town of Merton, Village of Chenequa, Village of Hartland, and Village of Nashotah. The District's custodial staff have been instructed to remove any campaign signs placed on District property.

In 1934, Congress enacted a law, [18 U.S.C. 1725](#), known as the "mailbox restriction" that prohibits anyone from placing mailable matter without postage into any mailbox, which includes campaign materials.

### Campaign Finance Contribution Limits for School Board Candidates

In early 2022, the Ethics Commission's staff provided the Wisconsin Association of School Boards with a [spreadsheet](#), based on the 2020 federal census, that shows each district's total population and calculates a limit that applies to (1) contributions from any individual or another candidate committee (the yellow column); or (2) contributions from a political action committee (the gray column). Please note that unless the legislature amends the campaign finance laws, the 2020 census data will be used to determine the applicable campaign contribution limits until the results of the 2030 census are available. All candidate committees must adhere to the applicable contribution limits, even if the committee has registered as "exempt" from filing campaign finance reports. All questions should be directed to the Ethics Commission. Campaign Finance Report Filing Deadlines: <https://ethics.wi.gov/Pages/CampaignFinance/ReportPeriods.aspx>

### Additional Information

Annual Compensation for Lake Country Schools' Board Members is currently \$1,100 for 2023-2024.

Board of Education webpage: <https://www.lcs.k12.wi.us/schoolinfo/about-lcs-board.cfm>

Board agendas website: <https://www.lcs.k12.wi.us/schoolinfo/board-of-education-meeting-agendas.cfm>

Board policies website: <https://www.lcs.k12.wi.us/schoolinfo/policies.cfm>

Board Meetings are held in person: <https://www.lcs.k12.wi.us/schoolinfo/board-of-education-meeting-schedule.cfm>

Candidates' Filing Status and Election Information is here: <https://www.lcs.k12.wi.us/schoolinfo/school-board-election.cfm>

## 2024 BALLOT ACCESS CHECKLIST FOR SCHOOL DISTRICT CANDIDATES



Each of the following forms must be completed and filed on time by a candidate for School District office in order for the candidate's name to be placed on the ballot at the **February 20, 2024 Spring Primary** and the **April 2, 2024 Spring Election**.

The filing officer for School District offices is the School District Clerk. Candidates should contact their filing officer for further information or to obtain any of the necessary forms.

### All School District Candidates must:

- Complete and Submit a Campaign Registration Statement (Form CF-1)** to the filing officer prior to raising or spending any funds, and no later than **5 p.m. on Tuesday, January 2, 2024**, or the candidate's name will not be placed on the ballot. If the form is faxed or emailed, the original document must follow postmarked no later than January 2, 2024. Wis. Stat. §§ 8.10(5), 8.21, 8.30(4), 120.06(6)(b), Wis. Admin. Code EL § 6.04.

- **New Candidates**

- File a campaign registration statement before campaign funds are collected or spent or before submitting nomination papers. Wis. Stat. §§ 11.0202(1)(a), 11.0101(1).

- **Continuing Candidates**

- Amend your current registration, including the office sought and the new election and primary dates. Wis. Stat. §§ 11.0202 (1)(a), 11.0101(1).

- Complete and Submit a Declaration of Candidacy (Form EL-162sd)** to the filing officer no later than **5:00 p.m. on Tuesday, January 2, 2024** or the candidate's name will not be placed on the ballot. If the form is faxed or emailed, the original document must follow, postmarked no later than January 4, 2023. Wis. Stat. §§ 8.10(5), 8.21, 8.30(4), Wis. Admin. Code EL § 6.04.

### If nomination papers are used, a school district candidate must also:

- Circulate and Submit Nomination Papers for Nonpartisan Office (Form EL-169)** to the filing officer no later than **5:00 p.m. on Tuesday, January 2, 2024**. Only original nomination papers (no photocopies, faxes, or emailed documents) will be accepted. Nomination papers may not be circulated before December 1, 2023. Wis. Stat. § 8.10(2), Wis. Admin. Code EL § 6.04(2).

The number of signatures required is as follows:

Board of School Directors - 1st Class Cities	400 - 800
School District Officer - with Territory within a 2nd Class City	100 - 200
School District Officer - with no Territory within a 1st or 2nd Class City	20 - 100

FOR OFFICE USE ONLY

# Declaration of Candidacy

## School Board Candidates

(See instructions for preparation on back)

Is this an amendment?

**Yes** (if you have already filed a DOC for this election)

**No** (if this is the first DOC you have filed for this election)

I, \_\_\_\_\_, being duly sworn, state that  
Candidate's name

I am a candidate for the office of School Board Member \_\_\_\_\_  
Include seat number or name of apportioned area, if applicable

and, at the time of filing this document, I will meet the applicable age, citizenship, residency and voting qualification requirements, if any, prescribed by the constitutions and laws of the United States and the State of Wisconsin, and that I will otherwise qualify for office, if nominated and elected.

I have not been convicted of a felony in any court within the United States for which I have not been pardoned.<sup>1</sup>

**My present address, including my municipality of residence for voting purposes is:**

House or fire no.	Street Name	Mailing Municipality and State	Zip code	Municipality of Residence for Voting

Town of   
Village of   
City of

**My name as I wish it to appear on the official ballot is as follows:**

\_\_\_\_\_  
(Any combination of first name, middle name or initials with surname. A nickname may replace a legal name.)

STATE OF WISCONSIN

County of \_\_\_\_\_  
(County where oath administered)



SS.

\_\_\_\_\_  
(Signature of candidate)

Subscribed and sworn to before me this \_\_\_\_\_ day of \_\_\_\_\_.

\_\_\_\_\_  
(Signature of person authorized to administer oaths)

Notary Public or  other official \_\_\_\_\_  
(Official title, if not a notary)

If Notary Public: My commission expires \_\_\_\_\_ or  is permanent.  
(date commission expires)

**NOTARY SEAL  
REQUIRED, IF OATH  
ADMINISTERED BY  
NOTARY PUBLIC**

EL-162SD For School District Candidates | 2019-08 | Wisconsin Elections Commission, P.O. Box 7984, Madison, WI 53707-7984 |  
| 608-261-2028 | web: gab.wi.gov | email: [elections@wi.gov](mailto:elections@wi.gov) |

<sup>1</sup> A 1996 constitutional amendment bars any candidate convicted of a misdemeanor which violates the public trust from running for or holding a public office. However, the legislature has not defined which misdemeanors violate the public trust. A candidate convicted of any misdemeanor is not barred from running for or holding a public office until the legislature defines which misdemeanors apply.

## Instructions for Completing the Declaration of Candidacy

All candidates seeking ballot status for election to school district office in the State of Wisconsin must properly complete and file a **Declaration of Candidacy**. This form must be **ON FILE** with the proper school district clerk no later than the deadline for filing nomination papers or the candidate's name will not appear on the ballot. A facsimile will be accepted if the FAX copy is received by the school district clerk no later than the filing deadline and the signed original declaration is received by the school district clerk with a postmark no later than the filing deadline.

### **Information to be provided by the candidate:**

- Type or print your name on the first line.
- The title of the office and any seat number or apportioned district for which you are seeking election must be inserted on the second line.
- **Felony convictions: Your name cannot appear on the ballot if you have been convicted of a felony in any court in the United States for which you have not been pardoned. Please see footnote on page 1 for further information with respect to convictions for misdemeanors involving a violation of public trust. These restrictions only apply to candidates for state and local office.**
- Your current address, including your municipality of residence for voting purposes, must be inserted on the fourth line. This must include your entire mailing address (street and number, municipality where you receive mail) and the name of the municipality in which you reside and vote (town, village, or city of ). If your address changes before the election, an amended Declaration of Candidacy must be filed with the School District Clerk. Wis. Stat. §.8.21.
- Type or print your name on the fifth line as you want it to be printed on the official ballot. You may use your full legal name, former surname, or any combination of first name, middle name, and initials, surname or nickname with last name.

**Note:** The Wisconsin Elections Commission has determined that, absent any evidence of an attempt to manipulate the electoral process, candidates are permitted to choose any form of their name, including nicknames, by which they want to appear on the ballot.

No titles are permitted. In addition, names such as "Red" or "Skip" are permitted, but names which have an apparent electoral purpose or benefit, such as "Lower taxes," "None of the above" or "Lower Spending" are not permitted. It is also not permissible to add nicknames in quotes or parentheses between first and last names. For example, John "Jack" Jones or John (Jack) Jones are not acceptable, but John Jones, Jack Jones or John Jack Jones are acceptable.

This form must be sworn to and signed in the presence of a notary public or other person authorized to administer oaths, such as a county, municipal or school district clerk. Wis. Stat. §§ 8.21(2), 887.01(1).

### **Information to be provided by the person administering the oath:**

- The county where oath was administered.
- The date the Declaration of Candidacy was signed and the oath administered.
- The signature and title of the person administering the oath. If signed by a notary public, the date the notary's commission expires must be listed, and *the notary seal is required*.

All school district candidates must file this form with the appropriate school district clerk no later than the deadline for filing nomination papers. Wis. Stats. §§ 8.10 (5), 8.15 (4)(b), 8.20 (6), 8.21, 8.50 (3)(a), 120.06 (6)(b).





**CAMPAIGN FINANCE REGISTRATION STATEMENT —  
LOCAL CANDIDATE COMMITTEE  
STATE OF WISCONSIN**

This form is used to register a local candidate committee under Chapter 11 of the Wisconsin Statutes. Committees required to register and report with a local filing officer must register using this form or a Form CF-1. This form will be made available to the public upon request. All information you provide is available to the public.

1. Is this an Amendment?  No  Yes

**SECTION A: GENERAL INFORMATION**

<b>A1. Committee Name</b> (Required for all Candidates - must be included in disclaimer on all communications)				
<b>A2. Email</b>		<b>A3. Phone</b>		
<b>A4. Mailing Address</b>		<b>A5. City</b>	<b>A6. State</b> WI	<b>A7. Zip</b>
<b>Depository Institution Information</b>				
<b>A8. Institution Name</b>		<b>A9. Street Address</b>	<b>A10. City</b>	<b>A11. State</b> WI
<b>Treasurer/Administrator Information</b>				
<b>A13. Name</b>		<b>A14. Email</b>	<b>A15. Phone</b>	
<b>A16. Mailing Address</b>		<b>A17. City</b>	<b>A18. State</b> WI	<b>A19. Zip</b>
<b>Other Officers (Optional)</b>				
<b>A20. Name</b>	<b>A21. Title</b>	<b>A22. Email</b>	<b>A23. Phone</b>	
<b>A24. Name</b>	<b>A25. Title</b>	<b>A26. Email</b>	<b>A27. Phone</b>	
<b>Filing Exemption</b> <i>Registrants which do not anticipate accepting or making contributions, making disbursements, or incurring obligations in an aggregate amount exceeding \$2,500 in a calendar year may claim an exemption from filing campaign finance reports. This exemption applies until the registrant exceeds the \$2,500 aggregate activity threshold, amends its registration, or is terminated.</i>			<b>A28. Exemption Affirmation</b> <input type="checkbox"/> Yes, this registrant is eligible for exemption. <input type="checkbox"/> No, this registrant is not eligible for exemption.	

**SECTION B: CANDIDATE INFORMATION**

<b>B1. Office Sought (include District/Branch)</b>		<b>B2. Political Party</b>	<b>B3. Election Date</b>	
<b>Candidate Information</b>				
<b>B4. Name</b>		<b>B5. Email</b>	<b>B6. Phone</b>	
<b>B7. Mailing Address</b>		<b>B8. City</b>	<b>B9. State</b> WI	<b>B10. Zip</b>
<b>Second Candidate Committee</b> <i>An individual who holds a state or local elective office may establish a second candidate committee to pursue another state or local office.</i>			<b>B11. Is this your only registered candidate committee in Wisconsin?</b> <input type="checkbox"/> Yes, this is my only candidate committee in Wisconsin. <input type="checkbox"/> No, this is my second candidate committee in Wisconsin.	
<b>B12. Other Office Held or Sought (include District/Branch)</b> Only complete B12 if you responded "No" to B11.				

## SECTION C: CERTIFICATION

### Accurate Information

I certify that I am an authorized representative of the candidate committee and that to my knowledge all of the information contained within this registration is true, correct, and complete.

### Timely Amendments

I am aware of the requirement to amend this registration statement within 10 days of any change of information contained within, including any change to the candidate committee's eligibility for exemption from campaign finance reporting.

### Records Retention

I acknowledge the requirement to maintain the records of the candidate committee in an organized and legible manner for three years from the close of the most recent contribution limit period (June 30 following the April election, December 31 following the November election).

### Continuing Compliance

I acknowledge that I am required to continue to comply with all applicable requirements under Chapter 11 of the Wisconsin Statutes until this registration is terminated. I understand that I am not released from any liability simply because the election date has passed.

### Treasurer

C1. Printed Name

C2. Signature

C3. Date

### Candidate

C4. Printed Name

C5. Signature

C6. Date

## Form Instructions

Candidates must complete all sections A, B, and C.

**Item 1. Is this an amendment?** Have you registered with this local clerk to run for office in a prior election?

**Item A1: Committee Name.** All candidates are required to register a committee. It is not required that the name include the candidate's name, but it is recommended. This committee name is required to be part of the disclaimer on all communications with express advocacy: 'Paid for by ...'

**A28: Exemption.** Candidates claiming exemption may not have more than \$2,500 of activity, in the aggregate per year. In a calendar year, if you raise \$1,600 and spend \$1,000 you have \$2,600 of aggregate activity and are not eligible to claim exemption.

**Depository Institution Information.** All candidates must designate a depository institution. While it is recommended that all candidates have a designated campaign depository account, candidates who will serve as their own treasurer may designate a single personal account to serve as the committee depository account while claiming a filing exemption and may intermingle personal and campaign funds (Wis. STAT. § 11.0201(2)(b)).

**Treasurer Information.** Each committee must appoint a treasurer. Any adult may serve as a treasurer. A candidate may serve as his or her own treasurer. If you are serving as your own treasurer, please write "Self" or "Candidate." A candidate serving as their own treasurer does not need to provide their name, address and contact information here because that information will already be provided in section B.

### Section B: Candidate Information

**B1.** Be sure to include the name of the county, municipality, or school district. There are 72 counties with county supervisors, 100's of school boards, and 1000's of municipal boards.

**B2.** Party - "N/A" or "None" for nonpartisan offices (April). Democrat, Republican, Constitution, Green, Independent, or other ballot status party for partisan (fall) primary/election.

**Section C: Certification.** All candidates must complete section C. If the candidate is serving as their own treasurer, they would only need to sign once, as either the candidate or treasurer.

# CAMPAIGN FINANCE CHECKLIST FOR 2024 MUNICIPAL AND SCHOOL DISTRICT CANDIDATES



Candidates should determine if they are required to make financial disclosure reports.

For Milwaukee City offices, the filing officer is the Milwaukee City Board of Election Commissioners. For all other municipal offices the filing officer is the municipal clerk. For school district offices, the filing officer is the school district clerk. Candidates should contact their filing officer for further information or to obtain any of the necessary forms.

## If NOT claiming the exemption from reporting requirements:

- Obtain a copy of the ***Campaign Finance Overview – Local Candidates*** (Revised 2023) Manual from your filing officer and carefully review it with your treasurer.
- Complete and submit a ***January Continuing Campaign Finance Report (Form CF-2L)*** to the filing officer no later than **January 16, 2024**, if registered before January 1, 2024. This report covers activity from July 1, 2023, or the date of registration (whichever is later), through December 31, 2023.
- Complete and submit a ***Pre-Primary Campaign Finance Report (Form CF-2L)*** to the filing officer no later than **February 12, 2024**, if a primary is held. This report covers activity from January 1, 2024, through February 5, 2024.
- Complete and submit a ***Pre-Election Campaign Finance Report (Form CF-2L)*** to the filing officer, no later than **March 25, 2024**. This report covers activity from February 6, 2024, through March 18, 2024, if a primary is held, or January 1, 2024, through March 18, 2024, if no primary is held.
- Complete and submit a ***July Continuing Campaign Finance Report (Form CF-2L)*** to the filing officer no later than **July 15, 2024**. This report covers activity from March 19, 2024, through June 30, 2024.

***Committees must file “Continuing Reports” until a termination report (CF-2L) is filed.***

For further information or to obtain any of the necessary forms, please contact:  
Wisconsin Ethics Commission.



**Wisconsin Ethics Commission**

PO Box 7125

Madison, WI 53707-7125

Phone: (608) 266-8123

Email: [campaignfinance@wi.gov](mailto:campaignfinance@wi.gov)

Websites: <https://cfs.wi.gov>

<https://ethics.wi.gov>

# CAMPAIGN FINANCE OVERVIEW

## Local Candidate Committees

**Published: September 2023**

This reflects the statutory changes effective January 2023  
(2021 Act 265).

This manual has been updated to include specific statutory citations and  
clarify basic reporting requirements for  
local candidate committees.

Provided pursuant to WIS. STAT. § [11.1304\(3\)](#) and  
in compliance with WIS. STAT. § [227.112](#).

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## REGISTRATION REQUIREMENTS

### **Who is Required to Register?**

Under Wisconsin campaign finance law, a candidate for election to public office must register a candidate committee with the appropriate filing officer. A candidate for local office must register with the appropriate filing officer as soon as is practicable after any of the following occur:

- (a) The individual takes any of the following affirmative actions to seek nomination or election to a state or local office:
  - 1. Files nomination papers with the appropriate filing officer;
  - 2. Is nominated as a candidate for state or local office by a caucus or by a political party and the nomination is certified to the appropriate filing officer;
  - 3. Receives a contribution, makes a disbursement, or gives consent for another person to receive a contribution or make a disbursement in order to bring about the individual's nomination or election to a state or local office;
- (b) The individual holds a state or local office and is the subject of a recall petition; or
- (c) The individual holds a state or local office.  
WIS. STAT. §§ [11.0101\(1\)](#), [11.0202\(1\)\(a\)](#).

Appropriate filing officers are as follows:

<b><u>Office:</u></b>	<b><u>Filing Officer:</u></b>
County Executive	County Clerk
County Supervisor	County Clerk
County Clerk or County Treasurer	County Clerk
Clerk of Circuit Court	County Clerk
Coroner	County Clerk
Register of Deeds	County Clerk
Sheriff	County Clerk
Multi-Jurisdictional Judge*	County Clerk
Mayor, Village President	Municipal Clerk
Aldersperson, Village Trustee, Town Board Member	Municipal Clerk
Municipal Clerk or Municipal Treasurer [if elected]	Municipal Clerk
Municipal Judge	Municipal Clerk
School District Board Member	School District Clerk

If a multi-jurisdictional judge serves a district with municipalities in more than one county, the filing officer is the County Clerk in the county with the largest population within the district.

[WIS. STAT. § 11.0102\(1\)\(b\)-\(g\)](#).

A candidate who receives no contributions, makes no disbursements, and incurs no obligations need not designate a campaign depository account until the first contribution is received, disbursement is made, or obligation is incurred. [WIS. STAT. § 11.0202\(1\)\(b\)](#). The only activities allowed prior to registration are: the minimum amount of money needed to open an account can be deposited at a financial institution, a

post office box can be rented, and contributions and disbursements needed for the production of nomination papers can be made. [WIS. STAT. § 11.0202\(2\)\(b\)](#).

After filing the registration statement, a candidate may begin receiving and disbursing campaign funds. [WIS. STAT. § 11.0202\(2\)\(a\)](#). The candidate committee's financial activities must be reported to the appropriate filing officer on campaign finance reports, unless the committee has claimed an exemption from filing reports. WIS. STAT. §§ [11.0103](#), [11.0104](#). These reports will disclose information on the receipts, expenditures, incurred obligations, and loans of the campaign. [WIS. STAT. § 11.0204\(1\)](#).

### **Completing a Registration Statement**

Registration statements are to be filed with the appropriate filing officer using the Ethics Commission's Campaign Finance Registration Statement ([CF-1 Local Candidate](#)). [WIS. STAT. § 11.1304\(1\)](#).

### **Required Information**

1. The name and mailing address of the candidate committee.
2. The name and mailing address of the candidate committee treasurer and any other custodian of books and accounts. Unless otherwise directed by the treasurer on the registration form and except as otherwise provided in this chapter or any rule of the commission, all mailings that are required by law or by rule of the commission shall be sent to the treasurer at the treasurer's address indicated upon the form.
3. In the case of a candidate committee of an independent candidate for partisan office or a candidate for nonpartisan county or municipal office, a list of the members of the committee, if any, whom the filing officer shall recognize as eligible to fill a nomination vacancy if the candidate dies before the election.
4. The name and address of the depository account of the candidate committee and of any other institution where funds of the committee are kept.

[WIS. STAT. § 11.0203](#).

### **Guide for Filing the Campaign Finance Registration Statement (CF-1)**

#### **Section A. General Information**

This section must be completed by all candidate committees. It contains the information identifying the candidate committee.

##### **A1. Candidate Committee Name**

This is the name used for the attribution/disclaimer statements on advertisements and yard signs. Common options include "First Name Last Name for Wisconsin" or "Friends of First Name Last Name."

##### **A2-12. Contact and Depository Institution Information**

If the candidate committee does not have a separate address/PO box, phone number, or email for the candidate committee, then the candidate should use their personal address, phone number, and email. Candidates claiming exemption may use a personal bank account as the committee depository account. Candidates not claiming the exemption are required to set up a separate bank account for their committee.

##### **A13-19. Treasurer Information**

If the candidate is serving as their own treasurer, they should include their own contact information here.

#### A20-27. Other Officers

This section is intended to list other individuals that are helping on the campaign and is entirely optional. Local non-partisan candidates can list an individual here with an asterisk by their name which indicates they are to fill a vacancy if the candidate were to pass away before the election.

#### A28. Exemption

Indicate whether the candidate committee will not accept contributions, make disbursements, or incur obligations in aggregate of more than \$2,500 in a calendar year and therefore is eligible to claim an exemption from filing campaign finance reports. If a committee raises \$1,600 and spends \$1,000, this is \$2,600 of aggregate activity, and it is not eligible to claim exemption.

### Section B. Candidate Information

#### B1-3. Election Information

List the office sought, including the district and branch and the election date. If the race is nonpartisan, then “nonpartisan” or “N/A” can be listed in B2. An amended registration must be filed for every election, listing the correct election date in B3.

#### B4-10. Candidate Information

This section should list the personal contact information of the candidate.

#### B11-12. Second Candidate Committee

If the candidate currently holds an elective office and has an additional candidate committee, they should indicate it in this section.

### Section C. Certification

Both the candidate and treasurer shall certify the initial registration here with their signatures. If the candidate serves as the treasurer, they only need to sign once, under “Candidate,” in C5. By signing the certification, the candidate and treasurer are certifying each of the following statements listed on the registration:

- I certify that I am an authorized representative of the candidate committee and that to my knowledge all of the information contained within this registration is true, correct, and complete.
- I am aware of the requirement to amend this registration statement within 10 days of any change of information contained within, including any change to the candidate committee’s eligibility for exemption from campaign finance reporting.
  - When any information reported on the registration statement changes, an amendment to the registration statement must be filed with the appropriate filing officer within **ten days**. [WIS. STAT. § 11.0203\(3\)\(a\)](#). The amended registration only requires either the candidate or treasurer to certify.
- I acknowledge requirement to maintain the records of the candidate committee in an organized and legible manner for three years from the close of the most recent contribution limit period (June 30 following the April election, December 31 following the November election).
  - The treasurer must maintain all records from each contribution limit period for 3 years following the end of each period. See the [Records Retention Requirement](#) section in this guide for more information.
- I acknowledge that I am required to continue to comply with all applicable requirements under Chapter 11 of the Wisconsin Statutes until this registration is terminated. I understand that I am not released from any liability simply because the election date has passed.



- A committee remains active until termination is requested pursuant to [WIS. STAT. § 11.0105](#). Even if the election has passed, the committee must continue to file reports and comply with all other requirements until the committee is terminated. [WIS. STAT. § 11.0207](#). See the [TERMINATION OF CAMPAIGN FINANCE REGISTRATION](#) section in this guide for more information on termination.

### **Candidates Seeking More Than One Office**

An individual who holds a state or local elective office may establish a second candidate committee to pursue another state or local office. [WIS. STAT. § 11.0202\(2\)\(d\)](#). If a second committee is established, that committee will register and file reports with the appropriate filing officer. [WIS. STAT. § 11.0102](#).

### **Failure to File a Registration Statement**

Failure to file a registration statement by the deadline for filing nomination papers may prevent a candidate's name from appearing on the ballot. WIS. STAT. §§ [8.15\(4\)\(b\)](#), [8.30\(2\)](#). If a statement or amendment is not filed on time, the registrant may be subject to a civil penalty. [WIS. STAT. § 11.1400\(1\)](#).

## **EXEMPTION FROM FILING CAMPAIGN FINANCE REPORTS**

### **Eligibility**

Committees may be eligible for an exemption from filing campaign finance reports if the committee anticipates that it will not accept or make contributions, make disbursements, or incur loans and other obligations in an aggregate amount exceeding \$2,500 in a calendar year. [WIS. STAT. § 11.0104](#). This includes the candidate's personal funds contributed and spent on campaign expenses. For example, if a committee receives \$1,600 in contributions and spends \$1,000 in disbursements, the committee's aggregate activity is \$2,600, and it would not be eligible for exemption.

A local candidate eligible for exemption may claim exemption at any time. A local candidate claiming exemption can remain on exemption until they exceed the threshold or request termination. [WIS. STAT. § 11.0104\(1\)\(c\)](#).

### **Financial Records During Exemption**

When a committee is exempt, it is not required to file any campaign finance reports until it requests termination. However, the candidate or treasurer is still required to keep financial records of all contributions to the committee and of all expenditures for three years after the end of the contribution limit period. [WIS. STAT. § 11.0201\(4\)](#). See the [Records Retention Requirement](#) section in this guide for more information.

A candidate committee that is exempt from filing campaign finance reports and for which the candidate serves as the treasurer may use a personal account as the campaign depository and intermingle campaign funds with personal and other funds. [WIS. STAT. § 11.0201\(2\)\(b\)](#). While permissible, intermingling funds can cause confusion about whether the funds were received or spent for personal or for campaign purposes. It can also make it more difficult to track contribution limits. Therefore, the best practice is to have a separate account for the candidate committee.

### **Revoking Exemption**

If the committee exceeds the \$2,500 aggregate limit on contributions, disbursements, or obligations, the committee must amend its campaign registration statement by checking in Box A28, "No, this registrant is not eligible for exemption." An amendment to the registration statement must be filed with the appropriate filing officer immediately. [WIS. STAT. § 11.0104\(5\)\(a\)](#). The committee is then required to file campaign finance reports beginning with the next regular report due after the earlier of either the date that the amended registration was filed or the date that the committee exceeded \$2,500 in aggregate contributions, disbursements, or obligations. [WIS. STAT. § 11.0104\(3\)](#).

If an exempt committee receives and accepts a contribution that results in the committee exceeding \$2,500 in aggregate activity, the committee shall do one of the following:

1. Immediately file an amended registration revoking the exemption; or
2. Within 15 days of receiving the contribution, return the contribution to the contributor or donate it to the common school fund or to a charitable organization.
3. If the candidate had been serving as their own treasurer and using a personal account while the committee was on exempt status, the committee must open a separate bank account when exempt status is revoked and transfer all campaign funds in the personal account to the new account.

## CONTRIBUTION LIMITS

All candidates running for elected office must abide by contribution limits that vary depending on the office sought and the population of the district.

Receiving Committee	From an Individual	From a Candidate Committee	From a PAC	From a Corporation/ Union
Local Candidate	Greater of \$500 or 2¢ times the population in the district. Not to exceed \$6,000.	Greater of \$500 or 2¢ times the population in the district. Not to exceed \$6,000.	Greater of \$400 or 2¢ times the population in the district. Not to exceed \$5,000.	\$0; Illegal

Districts of 20,000 inhabitants or less have an individual or candidate committee limit of \$500 and a PAC limit of \$400.

Districts with 300,000 inhabitants or more will have an individual or candidate committee limit of \$6,000 and a PAC limit of \$5,000.

Districts with more than 20,000 but less than 300,000 inhabitants will have varying individual and candidate committee limits between \$500 and \$6,000 and PAC limits between \$400 and \$5,000.

WIS. STAT. §§ [11.1101](#), [11.1104](#).

The number of inhabitants in the jurisdiction or district is determined by the latest federal census or the census information on which the district is based, as certified by the appropriate filing officer. [WIS. STAT. § 11.1101\(2\)\(h\)2](#).

### **Applicable Periods for Contribution Limits**

For the purpose of calculating contribution limits, a new candidate's campaign begins on the date she or he becomes a candidate. [WIS. STAT. § 11.1103\(2\)](#). The campaign period includes both the primary and election. For a candidate at the spring election, the contribution limit period ends the June 30<sup>th</sup> immediately following the spring election. For candidates at the general election, the contribution limit period ends the December 31<sup>st</sup> immediately following the general election. [WIS. STAT. § 11.1103\(2\)](#).

For an incumbent candidate whose office is elected at the spring election, the new contribution limit period begins on July 1 following the spring election. For an incumbent candidate whose office is elected at the general election, the new contribution limit period begins January 1 following the general election. [WIS. STAT. § 11.1103\(1\)](#). The contribution period runs through the primary and election for the next term of that office. For an incumbent candidate whose office is elected at the spring election, the period ends June 30<sup>th</sup> following the spring election. For an incumbent candidate whose office is elected at the general election, the contribution limit period ends December 31<sup>st</sup> following the general election. [WIS. STAT. § 11.1103\(2\)](#)

For a candidate at a special election, the campaign period runs from the date an individual becomes a candidate through the 22<sup>nd</sup> day after the election. [WIS. STAT. § 11.1103\(3\)](#).

## **Records Retention Requirement**

The treasurer of a candidate committee is required to maintain all records of the candidate committee in an organized and legible manner for three years following the end of each contribution limit period. [WIS. STAT. § 11.0201\(4\)](#) For example, a candidate is running for office at the Spring 2024 election. The applicable period runs from the date they become a candidate until June 30, 2024. The treasurer must maintain all records from that period until June 30, 2027. The candidate wins the election for a four-year term. The next applicable contribution limit period runs from July 1, 2024, through June 30, 2028. The treasurer must maintain the records from that period until June 30, 2031. This requirement also applies to committees on exemption.

## **Exceptions to Contribution Limits**

The following contributions to candidate committees may be made in unlimited amounts:

1. Contributions that a candidate makes to his or her own candidate committee from the candidate's personal funds or property; ([WIS. STAT. § 11.1104\(7\)](#));
2. Contributions made by a political party committee or legislative campaign committee to a candidate committee ([WIS. STAT. § 11.1104\(5\)](#)); or
3. Contributions used to pay legal fees and other expenses incurred as a result of a recount or petitions to recall an officer. To qualify for this exclusion, recall expenses must occur before the recall election is ordered, or in contesting or defending the order ([WIS. STAT. § 11.1104\(9\)-\(11\)](#)). Contributions used to pay these recount or recall expenses must be reported on the regular campaign finance reports. Both the contributor and the candidate should indicate which contributions are being used for this purpose.

## **CONTRIBUTIONS AND DISBURSEMENTS**

Candidate committees are required to make full reports of all contributions, disbursements, and obligations received, made, and incurred by the committee. Each report needs to include information covering the period since the last date covered on the previous report. [WIS. STAT. § 11.0204\(1\)\(a\)](#).

### **Contributions**

“Contribution” means any of the following:

1. A gift, subscription, loan, advance, or transfer of money to a committee;
2. With the committee's consent under [WIS. STAT. § 11.1109](#), a transfer of tangible personal property or services to a committee, valued as provided under [WIS. STAT. § 11.1105](#);
3. A transfer of funds between committees; or
4. The purchase of a ticket for a fundraising event for a committee regardless of whether the ticket is used to attend the event.

[WIS. STAT. § 11.0101\(8\)\(a\)](#).

“Contribution” does not include any of the following:

1. Services that an individual provides to a committee, if the individual is not specifically compensated for providing the services to the committee;
2. Any unreimbursed travel expenses that an individual incurs to volunteer his or her personal services to a committee;
3. The costs of preparing and transmitting personal correspondence;
4. Interest earned on an interest-bearing account;
5. Rebates or awards earned in connection with the use of a debit or credit card;
6. A loan from a commercial lending institution that the institution makes in its ordinary course of business;
7. The reuse of surplus materials or the use of unused surplus materials acquired in connection with a previous campaign for or against the same candidate, political party, or recall if the materials were previously reported as a contribution;
8. The cost of invitations, food, and beverages in connection with an event held in a private residence on behalf of a candidate committee;
9. Any communication that does not expressly advocate for the election or defeat of a clearly identified candidate;
10. A communication made exclusively between an organization and its members. In this subdivision, a member of an organization means a shareholder, employee, or officer of the organization, or an individual who has affirmatively manifested an interest in joining, supporting, or aiding the organization;
11. Any cost incurred to conduct Internet activity by an individual acting in his or her own behalf, or acting in behalf of another person if the individual is not compensated specifically for those services, including the cost or value of any computers, software, Internet domain names, Internet service providers, and any other technology that is used to provide access to or use of the Internet, but not including professional video production services purchased by the individual; or
12. Any news story, commentary, or editorial by a broadcasting station, cable television operator, producer, or programmer, Internet site, or newspaper or other periodical publication, including an

Internet or other electronic publication unless a committee owns the medium in which the news story, commentary, or editorial appears.

[WIS. STAT. § 11.0101\(8\)\(b\)](#).

### Required Information for Contributions

1. The date, full name, and street address of each person who has made a contribution to the candidate committee, together with the amount of the contribution. [WIS. STAT. § 11.0204\(1\)\(a\)1](#).
2. The occupation, if any, of each individual contributor whose cumulative contributions to the candidate committee for the calendar year are in excess of \$200. [WIS. STAT. § 11.0204\(1\)\(a\)3](#).
3. An itemized statement of each contribution made anonymously to the candidate committee. If the contribution exceeds \$10, the candidate committee shall specify whether the candidate committee donated the contribution to the common school fund or to a charitable organization and shall include the full name and mailing address of the donee. [WIS. STAT. § 11.0204\(1\)\(a\)4](#).
4. A statement of totals during the reporting period of contributions received and contributions donated. [WIS. STAT. § 11.0204\(1\)\(a\)5](#).

### In-Kind Contributions

An in-kind contribution is any good, service, or property offered to the candidate committee free of charge or at less than the usual cost, or payment of the candidate committee's obligations for such goods, services, or property. [WIS. STAT. § 11.0101\(8\)\(a\)2](#). Before making an in-kind contribution, the contributor is required to notify the candidate, candidate's agent, or the administrator or treasurer of the committee, and obtain either oral or written consent to the contribution. [WIS. STAT. § 11.1109](#). In-kind contributions are subject to the same itemization thresholds and the same contribution limits as monetary contributions. [WIS. STAT. § 11.0101\(8\)](#). Monetary contributions and in-kind contributions from a single contributor are added together for the purposes of determining compliance with contribution limits and the year-to-date amount for a specific contributor. [WIS. STAT. §§ 11.0101\(8\), 11.1103](#). If the contributor does not know the actual value of the contribution, a good faith and reasonable estimate of the fair market value should be provided to the candidate committee before the closing date of the next campaign finance report in which the contribution is required to be listed. [WIS. STAT. § 11.1105](#), [WIS. ADMIN. CODE ETH 1.20\(5\)](#).

For example, if a campaign worker purchases stamps that are used for a mailing and is not reimbursed for the cost of the stamps, the value of the stamps is an in-kind contribution to the candidate committee from that campaign worker. When an individual is paid to work on behalf of a candidate by a person other than the candidate committee, the payment for those services is an in-kind contribution to the candidate committee. If a person offers to provide food and beverages for a fundraiser at less than the ordinary market price, the difference between the ordinary market price and the cost to the candidate committee is an in-kind contribution from the person. If another person pays for a newspaper, radio, or TV ad, and coordinates with the candidate committee about the content, timing, or other details of that ad, that ad would be an in-kind contribution.

### Reporting In-Kind Contributions

An in-kind contribution received by the campaign committee is reported by the committee as **both a receipt and expenditure**. Reporting the amount of the in-kind contribution as a contribution allows the campaign to disclose the receipt of the contribution on its campaign finance report along with monetary contributions received and track year-to-date and campaign period totals. To keep the committee's cash

balance accurate, the amount of the in-kind received is also reported as an expenditure. The two entries offset each other so as to not affect the committee's cash balance.

If an estimate of the value of an in-kind contribution is the only value available at the time the candidate is required to file a report, the committee must report the estimated value of the contribution. [WIS. ADMIN. CODE ETH 1.20\(7\)](#). When the actual value of the estimated in-kind contribution is known, the actual amount is reported as an amendment to the original campaign finance report. *Id.*

### **Reporting of Joint Advertisements**

When committees engage in joint advertising with other committees, there is an exchange of in-kind contributions between the committees. The committees are receiving something of value from the other committee: they are receiving the full value of the ad, but they are only paying for a portion of it. Each committee will report giving in-kind contributions in the amount that they paid and receiving in-kind contributions in the amount paid for by the other committee.

For example, Committee A and Committee B split the cost of a \$500 ad, paying \$250 each to the vendor. Each committee will report a \$250 disbursement to the vendor covering their half of the ad. Each committee must also report an in-kind contribution received from the other committee and an outgoing in-kind disbursement to the other committee. Committee A will report making an in-kind disbursement of \$250 to Committee B and receiving a \$250 in-kind contribution from Committee B. Committee B will report likewise.

These in-kind contributions count towards the contribution limits. For instance, if the contribution limit for Committee A is \$500, Committee B has now contributed \$250 to Committee A, assuming this is their first contribution. Committee B can contribute a maximum of \$250 more to Committee A for the applicable period. See the [CONTRIBUTION LIMITS](#) section in this guide for more information.

The in-kind contributions likewise count towards determining whether a committee has reached the threshold to remain on exempt status. In this example, each committee has reported \$500 of disbursements and \$250 of contributions, for a total of \$750 of aggregate activity. Joint advertising can cause a committee to rapidly reach the contribution limit and the exemption threshold, so be careful when considering such activity.

### **Contributions and Other Income from Businesses**

Businesses may make contributions under some circumstances, but the restrictions vary by the type of business. A candidate should never list the name of a business as the contributor unless it is reported as "other income."

1. Corporations **may not contribute** to local or state candidates in the State of Wisconsin. [WIS. STAT. § 11.1112](#).
2. Sole proprietorships may contribute. The contribution must be reported under the name of the individual owner. This contribution counts toward the contribution limits from that individual to the candidate. [WIS. STAT. § 11.1113\(1\)](#).
3. Partnerships may contribute. The contribution must be reported under the names of the individual partners. The partnership may agree beforehand on how to allocate a portion of the contribution to each partner. If the partnership does not inform the candidate how the contribution should be allocated

between the partners, then the contribution should be divided up according to each partner's share of the partnership's profits. [WIS. STAT. § 11.1113\(2\)](#).

4. LLCs taxed as a sole proprietorship or partnership may contribute. The contribution must be reported under the name(s) of the individual owner(s). If there is more than one owner, contributions should be allocated as described in the partnership section above. [WIS. STAT. § 11.1113\(3\)](#). However, a candidate committee may not accept a contribution from an LLC taxed as a corporation.

Occasionally, a candidate committee may receive other income, like interest on a savings or checking account, or a refund of a security deposit, from a business. This other income is not a contribution and may be accepted from any type of business. [WIS. STAT. § 11.0101\(8\)\(b\)](#). The income should be reported as "Other Income" in campaign finance reports. [WIS. STAT. § 11.0204\(1\)\(a\)10](#).

### **Contributions Transferred through Conduits**

A conduit is any individual, committee or group that receives contributions from individuals, deposits those contributions in a financial institution, and then transfers the contributions to a candidate or political committee selected by the original contributor. [WIS. STAT. § 11.0101\(7\)](#). The conduit may not exercise any discretion over the amount or ultimate recipient of the contributions. [WIS. STAT. § 11.0701\(3\)](#). A conduit is required to register with the Ethics Commission. [WIS. STAT. § 11.0702](#).

### **Reporting Conduit Contributions**

Conduits are required to provide a transmittal letter with contribution checks sent to a receiving committee. The transmittal letter must identify the organization as a conduit, and list the individual contributors, the amount of each individual's contribution, and the date the individual authorized the contribution. [WIS. STAT. § 11.0704\(1\)](#). Contributions transferred through conduits are reported as contributions received from the individuals listed in the transmittal letter. [WIS. STAT. § 11.1106\(2\)](#). These contributions are reported under the individual's name. [WIS. STAT. § 11.1106\(1\)](#). They are subject to itemization on the same basis as other individual contributions. [WIS. STAT § 11.0204\(1\)\(a\)](#).

### **Returned Contributions**

A committee may return a contribution at any time before or after it has been deposited. [WIS. STAT. § 11.1110\(1\)](#), [WIS. ADMIN. CODE ETH 1.26](#). Any contribution a committee returns to the donor after depositing it in the campaign account must be reported as a returned contribution to the contributor. A committee that accepts an unlawful contribution, reports that contribution, and returns that contribution within 15 days of the filing date for that report does not violate the contribution or source limits. [WIS. STAT. § 11.1110\(2\)\(b\)](#). For example, a candidate receives a contribution from an individual on October 1, 2023. The candidate committee properly reports the contribution on the January 2024 Continuing Report, which was due and was filed on January 15, 2024. While preparing the January 2024 Continuing Report, the candidate realizes that the individual had already contributed the maximum amount for that contribution limit period. So, the candidate committee returns the contribution to the contributor on January 20, 2024. In this instance, the committee would not be in violation for exceeding the contribution limits. However, if the committee did not return the contribution until February 1, 2024, the subsequent return of the illegal contribution would not constitute a defense to the violation. [WIS. STAT. § 11.1110\(2\)\(a\)](#).



## **Prohibited Contributions**

Certain contributions are prohibited by Wisconsin law. A candidate committee may not accept the following types of contributions:

1. Anonymous contributions of more than \$10 ([WIS. STAT. § 11.1108](#));
2. Contributions in cash of more than \$100 ([WIS. STAT. § 11.1107](#));
3. Contributions given in the name of someone other than the contributor ([WIS. STAT. § 11.1204\(1\)](#));
4. Contributions from corporations, associations organized under ch. 185 or 193, labor organizations, or federally recognized American Indian Tribes ([WIS. STAT. § 11.1112](#));
5. Contributions in excess of the aggregate limits set by law ([WIS. STAT. §§ 11.1101, 11.1204\(3\)](#)); or
6. Contributions from foreign nationals. [WIS. STAT. § 11.1208\(4\)](#).

Licensed lobbyists can make personal contributions to candidates for local office and their candidate committees, provided that the local candidate is **not** currently holding or a candidate for a partisan state elective office. [WIS. STAT. § 13.625\(1m\)](#). Lobbyists are prohibited from making campaign contributions to state candidates for partisan state office except between the first day authorized to circulate nominations papers and the day of a special or general election. Additionally, if the legislature is in session during that period, lobbyists may not make contributions to legislators or candidates or legislative office. *Id.* For further information on lobbyist contributions, visit the [Campaign Finance Prohibited Contributions](#) page on the Ethics Commission's website (<https://ethics.wi.gov>) or contact the Ethics Commission.

A candidate committee should monitor contributions carefully. If the candidate committee is aware that a contribution was received from a potentially prohibited source, the committee should confirm that the contribution is lawful. [WIS. STAT. § 11.1204\(3\)](#). It is recommended that a committee not accept any contributions if the committee cannot determine whether the contribution is lawful.

## **Disbursements**

“Disbursement” means any of the following:

1. An expenditure by a committee from the committee's depository account;
2. The transfer of tangible personal property or services by a committee;
3. A transfer of funds between committees; or
4. The purchase of a ticket for a fundraising event for a committee regardless of whether the ticket is used to attend the event.

[WIS. STAT. § 11.0101\(10\)\(a\)](#).

“Disbursement” does not include any of the following:

1. A communication made exclusively between an organization and its members. In this subdivision, a member of an organization means a shareholder, employee, or officer of the organization, or an individual who has affirmatively manifested an interest in joining, supporting or aiding the organization;
2. A communication or Internet activity by an individual acting in his or her own behalf, or acting on behalf of another person if the individual is not compensated specifically for those services, including the cost or value of computers, software, Internet domain names, Internet service

providers, and any other technology that is used to provide access to or use of the Internet, but not including professional video production services purchased by the individual;

3. Any news story, commentary, or editorial by a broadcasting station, cable television operator, producer, or programmer, Internet site, or newspaper or other periodical publication, including an Internet or other electronic publication unless a committee owns the medium in which the news story, commentary, or editorial appears; or
4. A nominal fee paid for a communication to the general public.

[WIS. STAT. § 11.0101\(10\)\(b\).](#)

#### **Required Information for Disbursements**

1. The date, full name, and street address of each committee to which the candidate committee has made a contribution, together with the amount of the contribution. [WIS. STAT. § 11.0204\(1\)\(a\)2.](#)
2. An itemized statement of every disbursement exceeding \$20 in amount or value, together with the name and address of the person to whom the disbursement was made, and the date and specific purpose for which the disbursement was made. [WIS. STAT. § 11.0204\(1\)\(a\)8.](#)
3. A statement of totals during the reporting period of disbursements made. [WIS. STAT. § 11.0204\(1\)\(a\)10.](#)

#### **Obligations and Loans**

Candidate committees are required to make full reports of all obligations received, made, and incurred by the committee. The committee needs to include in each report information covering the period since the last date covered on the previous report. [WIS. STAT. § 11.0204\(1\)\(a\).](#) A loan received by a committee from any person or committee, other than a loan of money by a commercial lending institution in the ordinary course of business, is considered a contribution while outstanding and counts towards the contribution limit of the creditor. After repayment, the loan is no longer counted towards the limit. [WIS. STAT. § 11.0101\(8\)\(a\)1., WIS. ADMIN. CODE ETH 1.25.](#)

“Obligation” means any express agreement to make a disbursement, including the following:

1. A loan or loan guarantee;
2. A promise to purchase, rent, or lease tangible personal property; or
3. A promise to pay for a service that has been or will be performed.

[WIS. STAT. § 11.0101\(23\).](#)

#### **Required Information for Obligations**

1. An itemized statement of every obligation exceeding \$20 in amount or value, together with the name of the person or business with whom the obligation was incurred, and the date and the specific purpose for which each such obligation was incurred must be reported in campaign finance reports. [WIS. STAT. § 11.0204\(1\)\(a\)9.](#)
2. A statement of the balance of obligations incurred as of the end of the reporting period. [WIS. STAT. § 11.0204\(1\)\(a\)11.](#)

### Required Information for Loans

Each loan of money made to the candidate committee must be reported with all of the following:

1. The full name and mailing address of the lender;
2. A statement of whether the lender is a commercial lending institution;
3. The date and amount of the loan;
4. The full name and mailing address of each guarantor, if any;
5. The original amount guaranteed by each guarantor; and
6. The balance of the amount guaranteed by each guarantor at the end of the reporting period.

WIS. STAT. § 11.0204(1)(a)7.

### Cash Balances

Candidate committees are required to provide a statement of the cash on hand at the beginning and end of each reporting period. WIS. STAT. § 11.0204(1)(a)6. The beginning cash balance should match the ending cash balance of the prior report. The ending cash balance should equal the beginning cash balance plus all receipts and minus all expenditures.

## CAMPAIGN FINANCE REPORTS

All registrants that are not exempt from filing must file campaign finance reports. [WIS. STAT. § 11.0103\(1\)](#).

The information listed on the campaign finance report discloses the financial activity of the candidate committee. The law requires disclosure of income, disbursements, and incurred obligations. [WIS. STAT. § 11.0204\(1\)\(a\)](#). For all contributors, the report must disclose the individual's name and address. [WIS. STAT. § 11.0204\(1\)\(a\)1](#). If the individual's year-to-date total exceeds \$200, the report must also provide the individual's occupation. [WIS. STAT. § 11.0204\(1\)\(a\)3](#). Treasurers and candidates are required to make a "good faith effort" to obtain all information required on the reports. [WIS. STAT. § 11.0103\(1\)\(a\)](#).

### Types of Reports

Candidates on the ballot must file a pre-primary and a pre-election report which is due eight days before the primary or general election. [WIS. STAT. §§ 11.0204\(3\)\(a\), \(5\)\(a\)](#). Candidates for local nonpartisan office do not have to file pre-primary reports if they do not appear on a primary ballot. [WIS. STAT. § 11.0204\(2\)\(a\)](#). Candidates that lose in the primary or general election must continue to file reports until they are eligible for, and request, termination of their committee. [WIS. STAT. § 11.0207](#). Candidates must also file continuing reports in January and July of each year until they terminate their candidate committee, even if not on the ballot. [WIS. STAT. §§ 11.0204\(3\)\(b\), \(5\)\(b\), \(c\)](#).

With some restrictions, candidate committees that will not spend or receive more than \$2,500 in a calendar year may amend their registration and claim "exempt" status, which means they do not have to file campaign finance reports. [WIS. STAT. § 11.0104](#). See the [EXEMPTION FROM FILING CAMPAIGN FINANCE REPORTS](#) section in this guide for more information.

All candidates wishing to terminate are required to file a termination report. [WIS. STAT. § 11.0105\(1\)\(a\)](#). If a candidate claims exemption and wishes to terminate after the election, they must file a report showing all contributions and all disbursements for the calendar year. *See [Id.](#)*

### Reporting Periods and Elections

**Spring Primary:** A candidate at the spring primary must file: (1) a pre-primary report; (2) a pre-election report; and (3) annually in each year of an election cycle, a report on January 15 and July 15. [WIS. STAT. § 11.0204\(2\)](#).

**Spring Election:** A candidate at the spring election must file: (1) a pre-election report; and (2) annually in each year of an election cycle, a report on January 15 and July 15. [WIS. STAT. § 11.0204\(3\)](#).

**Partisan Primary:** A candidate at a partisan primary must file: (1) a pre-primary report; (2) a pre-election report; (3) in an odd-numbered year, a report on January 15 and July 15; and (4) in an even-numbered year, a report on January 15, July 15, and September 30. [WIS. STAT. § 11.0204\(4\)](#).

**General Election:** A candidate at a general election must file: (1) a pre-election report; (2) in an odd-numbered year, a report on January 15 and July 15; and (3) in an even numbered year, a report on January 15, July 15, and September 30. [WIS. STAT. § 11.0204\(5\)](#).

**Special Election:** A candidate at a special election must file: (1) a pre-primary report if a primary is held; (2) a pre-election report; (3) a report on January 15 and July 15; and (4) unless a continuing report is required within 45 days after the special election, a post-election report.

Reporting deadlines can be found on the Ethics Commission's website at:  
<https://ethics.wi.gov/Pages/CampaignFinance/ReportPeriods.aspx>.

### **How to Complete Campaign Finance Reports**

The Ethics Commission requires local candidate committees to file all necessary reports with the appropriate filing officer with the Local Campaign Finance Report (<https://ethics.wi.gov/Resources/CF-2L>) or the Electronic Local Campaign Finance Report (<https://ethics.wi.gov/Resources/CF-2LE>), if the filing officer accepts reports in an electronic format. WIS. STAT. §§ [11.0204\(1\)\(a\)](#), [11.1304\(1\)](#).

When completing the reports, each schedule shall begin with the first contribution received, disbursement made, or obligation incurred. [WIS. STAT. § 11.0204\(1\)\(b\)](#). All contributions received by the committee must be reported in Schedule 1 (Receipts) of the campaign finance report. Contributions and loans from individuals are listed in Schedule 1-A (Contributions Including Loans from Individuals). Contributions from other committees, such as political action committees, political party committees, and other candidate committees, are reported in Schedule 1-B (Contributions from Committees). All other income, such as loans from financial institutions, contributions returned from other registrants, refunds, returns of deposits or interest on investments are reported in Schedule 1-C (Other Income and Commercial Loans). The date which must be provided for all contributions is the date the committee received the contribution, that is, the date it acquired possession and control of the contribution, **not** the date of deposit or date on the check (unless all dates are the same). [WIS. STAT. § 11.0103\(2\)\(a\)1](#).

All money spent by the committee is reported in Schedule 2 (Disbursements) of the campaign finance report. General operating expenditures are listed in Schedule 2-A (Gross Expenditures). Contributions to other political committees are listed in Schedule 2-B (Contributions to Committees).

Additional information required to be disclosed is reported in Schedule 3 (Additional Disclosure) of the campaign finance report. All obligations of the committee such as unpaid debts are listed in Schedule 3-A (Incurred Obligations Excluding Loans). Loans and the individuals who guarantee loans for the committee are listed in Schedule 3-B (Loans).

A Termination Request ([CF-13](#)) is used for requests to terminate a committee. This form should be filed along with the candidate's final report. See the [TERMINATION OF CAMPAIGN FINANCE REGISTRATION](#) section in this guide for more information.

### **No-Activity Report ("Postcard Report")**

If a candidate committee receives no contributions, makes no disbursements and incurs no obligations during a reporting period, the committee may file a "No-Activity Report," or "Postcard Report," ([https://ethics.wi.gov/Resources/CF-2NA\\_Statement\\_of\\_No\\_Activity.pdf](https://ethics.wi.gov/Resources/CF-2NA_Statement_of_No_Activity.pdf)). This form should be used **only** when there has been no financial activity and the cash balance remains unchanged during the reporting period. [WIS. STAT. § 11.0103\(3\)\(d\)](#).

## **ATTRIBUTION STATEMENTS (DISCLAIMERS)**

Attribution statements, commonly referred to as disclaimers, are statements required to be placed on any communication containing express advocacy in order to identify the person(s) who paid for and/or authorized the communication. [WIS. STAT. § 11.1303\(2\)](#).

Express advocacy refers to a communication that references a clearly identified candidate and unambiguously relates to the election or defeat of that candidate. Examples include “Vote for John Doe,” “Reelect your Incumbent Mayor,” or “Doe for City Council.” [WIS. STAT. § 11.0101\(11\)](#).

No disbursement by a candidate committee may be made anonymously and no contribution or disbursement may be made in a fictitious name or by one person or organization in the name of another. [WIS. STAT. § 11.1303\(1\)](#).

Every printed advertisement, billboard, handbill, sample ballot, television or radio advertisement, or other communication containing express advocacy which is paid for by any contribution or disbursement shall clearly identify its source. [WIS. STAT. § 11.1303\(2\)\(a\)](#).

Every communication containing express advocacy the cost of which is paid for or reimbursed by a committee, or for which a committee assumes responsibility, whether by accepting a contribution or making a disbursement, shall identify its source by the words "Paid for by" followed by the name of the committee making the payment or reimbursement or assuming responsibility for the communication and may include the name of the treasurer or other authorized agent of the committee. [WIS. STAT. § 11.1303\(2\)\(b\)](#).

Attribution statements are not required on communications containing express advocacy printed on small items on which the information required cannot be conveniently printed, including text messages, social media communications, and certain small advertisements on mobile phones. [WIS. STAT. § 11.1303\(2\)\(f\)](#). Attribution statements are also not required on business cards, buttons, pencils, pens, pins, skywriting, tickets, or small online ads and similar electronic communications where the language required could not conveniently be included, and that either link directly to a website that includes the required attribution, or provide an automatic display that includes the attribution. [WIS. ADMIN. CODE ETH 1.96\(5\)](#).

### **Formats for Disclaimers**

When a communication is paid for by a candidate committee, the disclaimer must include the words “Paid for by,” followed by the name of the committee:

“Paid for by Friends of Mary Smith.”

The disclaimer may also include the name of the treasurer or other authorized agent:

“Paid for by Friends of Mary Smith for Mayor, James Jones, Treasurer.”

When a communication is paid for by another in coordination with a candidate committee, both the person making the payment and the committee accepting the in-kind contribution should be listed:

“Paid for by Citizens for Government, Authorized by Mary Smith for Governor.”

Attribution statements must be readable, legible, and readily accessible. [WIS. STAT. § 11.1303\(2\)\(g\)](#). That is, each individual letter or character must be clearly printed so that it can be easily understood, it can be read easily, and it can be seen without much difficulty. [WIS. ADMIN. CODE ETH § 1.96\(1\)](#). A disclaimer is evident to be readable, legible, and readily accessible if it meets all of the following requirements:

1. It appears in a sans-serif font.
2. The font is sufficiently large. On a written communication no larger than 8.5 inches by 11 inches, it is printed in at least 10-point font. On a written communication larger than 8.5 inches by 11 inches but smaller than 24 inches by 36 inches, it is printed in at least 12-point font. On a larger written communication, the letters are at least four percent of the vertical height of the written communication.
3. It appears in black text on a white background, or the contrast between the background color and the text color is at least as great as between the background color and text color of the largest text in the communication.
4. It remains visible for a period of at least four seconds.

[WIS. ADMIN. CODE ETH 1.96\(3\)](#).

All attribution statements shall be presented in a clear and conspicuous manner that gives the recipient of the communication adequate notice of the identity of the person making the payment or reimbursement or assuming responsibility for the communication. [WIS. ADMIN CODE ETH 1.96\(2\)](#).

## **TERMINATION OF CAMPAIGN FINANCE REGISTRATION**

A candidate committee may terminate its registration if it meets the following requirements [WIS. STAT. § 11.0105](#):

1. Determines that all financial activity will stop, and that she or he will no longer receive contributions, make disbursements, or incur obligations;
2. Files a termination campaign finance report showing that all incurred obligations have been paid or satisfied, and that the cash balance has been reduced to zero; and
3. Completes a request for termination using the Termination Request Form, [CF-13](#).

A candidate may not terminate his or her registration before a primary or election in which he or she is a candidate. If a candidate loses a primary, he or she may terminate before the election. [WIS. STAT. § 11.0105\(1\)\(b\)](#). Within 10 days after losing an election, the candidate or other authorized person should either: 1) Amend the registration statement to update the office sought or election date if the candidate would like to run for office at a future election; or 2) terminate the candidate committee.

Incumbent office holders are candidates. Because candidates are required to file a campaign finance registration statement, an incumbent officer holder cannot terminate his or her campaign finance registration prior to leaving office. [WIS. STAT. §§ 11.0101\(1\)\(c\), 11.0202\(1\)\(a\)](#). Incumbents with limited financial activity may file for “exempt” status, which means they would not have to file campaign finance reports during that time. See the “[EXEMPTION FROM FILING CAMPAIGN FINANCE REPORTS](#)” section in this guide for more information.

### **Disposal of Residual Funds**

Residual funds may be used for any purpose that is not for an individual’s strictly personal use and is not prohibited by law, including:

1. Repay any outstanding loans. If loans are not repaid, they must be forgiven before the committee can request termination;
2. Returning money to contributors in amounts that are not more than the contributor’s original contribution (note: the candidate or treasurer may choose which contributors to refund. The committee is not required to pro-rate and return a portion to all contributors);
3. Donating money to any tax-exempt charitable organization or the Common School Fund;
4. Transferring money to another registrant within the permitted contribution limit; or
5. Using any combination of the above.

[WIS. STAT. §§ 11.0105, 11.1208\(2\)\(a\)](#).

Prior to making these disbursements of residual funds, make sure the committee does not have any pending settlement offers.





# GUIDE FOR CANDIDATES

**2024 Spring Election Edition**

(Published October 2023)



*Supporting, Promoting and Advancing Public Education*

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## A MESSAGE FROM THE WASB PRESIDENT

Congratulations! You have made the important decision to run for your local board of education. Whatever the outcome of your election, your community is grateful that you made the decision to step up and get involved to make your local school district even better.

Wisconsin has 421 public school districts, each one governed by locally elected school board members. Their job is to make the policy decisions that will provide all of their students with the best education possible and to hire, supervise, and evaluate the superintendent. There are numerous state and federal laws that must be observed, and many of them need community decision makers to fine-tune the requirements to fulfill the spirit of the law, as well as the letter, for each district. Working with superintendents, administrators, and teachers, school board members go about building effective educational systems to benefit their students and their communities.

As a community member, you have always had the opportunity to voice your thoughts, concerns, goals and desires to enhance your school district. As an elected board member, you have the added responsibility to be involved in the full decision-making process. Working with the other members of your board, you will have the responsibility of approving policy for administration and staff to follow, evaluating the superintendent, setting annual budgets, and advocating for your students and your district.

As a member of the Wisconsin Association of School Boards, your district has the opportunity to utilize the many tools developed by the WASB to follow good governance guidelines including webinars, podcasts, workshops, conferences, and the annual State Education Convention held every January.

Best wishes to you in your election journey, and thank you for stepping up to make your local district a great one.

*Rosanne Hahn*

Rosanne Hahn, WASB President  
Burlington Area

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# QUALITIES OF A SCHOOL BOARD MEMBER

There are many qualifications and qualities that experienced school board members have indicated are important to school board membership. These include:

- A commitment to the belief that all children of the school district are entitled to have available to them a beneficial educational program.
- An open mind and readiness to learn.
- A willingness to attend seminars and workshops which can help them make intelligent decisions in school affairs.

[The first WASB events for newly elected school board members are the New School Board Member Gatherings held in mid to late April in 15 regions throughout the state to briefly review school board member responsibilities and introduce the new members to the services and information provided by the WASB.]

- A vision and an ability to understand changes in our society.
- The ability to act with other school board members to advance the best interests of the school district.
- The capability to articulate the philosophy and goals of the school and to listen carefully to the criticisms offered by people with differing views.
- A willingness to invest the hours that will be necessary to faithfully discharge their duties.
- Freedom from conflicts of interest.

# WHAT DOES THE SCHOOL BOARD DO?

School boards lead and govern the schools and educational programs of our local public school districts. That leadership role is performed as part of a team that includes the district administrator (also sometimes called the superintendent). The leadership team, in turn, operates within a unique framework of authority, duties, and powers that is established by a variety of state and federal laws and that is supplemented by local policy decisions.

There are several different types of public school districts in Wisconsin, including K-12 common school districts, K-8 common school districts, union high school districts, unified school districts, and the Milwaukee Public Schools. While the different types of school districts and their boards share many general characteristics, there are also some differences in the specific powers and responsibilities that are assigned to them. All school districts and school boards are alike, however, in that student learning and student achievement constitute the centerpiece of their mission.

## ***Major Responsibilities:***

**STUDENT ACHIEVEMENT:** The school board adopts academic standards for pupils and establishes expectations for education in the district. The school board monitors student achievement and exercises general supervision over the schools.

**POLICYMAKING:** Policymaking covers the broad range of goals, expectations, rules and regulations that school boards enact, alter or repeal. Board policies are the basis of school district operations. It is through policy-making that the board takes action, directing the district administrator and staff regarding district priorities. To have a well-organized school system, the board needs a sound philosophy of education as a basis for policymaking.

**BOARD-ADMINISTRATOR RELATIONS:** Research has shown that the board-administrator relationship is central to the success of the district. Effective board members are aware of the differences between their role and that of school administrators. In essence, the school board determines *what* needs to happen and the district administrator and staff determine *how* to make it happen. The school board sets its goals and operational policies and expects the district administrator to carry them out. Although the board should refrain from becoming involved in the day-to-day operation of the schools, it should follow up on the administration and operation of the schools and require periodic reports for purposes of evaluation.

# QUESTIONS AND ANSWERS

***Q. What are the legal qualifications for being a school board member?***

A board member must be an eligible elector of the school district. According to the Wisconsin Elections Commission, in order to qualify for placement on the ballot as a candidate in a school board election, a person must:

- (a) Be a citizen of the United States;
- (b) Be 18 years of age or older;
- (c) Have no disqualifying prior criminal convictions; and
- (d) Be a resident of the school district for at least 28 consecutive days at the time of filing a declaration of candidacy.

In some school districts, school board members are elected to numbered seats, to designated and apportioned election districts, or according to a plan of apportionment of board seats among the cities, towns and villages in the district. Where a plan of apportionment is in place, the person elected to an apportioned seat must reside in the designated geographic area at the time he or she takes the oath of office. In all school board elections other than in Milwaukee and Racine, each board member is ultimately elected by the votes of the electors of the entire school district.

There are at least three different potential conflict of interest situations that a candidate should consider before filing his or her declaration of candidacy:

*Private interest in public contracts:* School board members are prohibited by a felony criminal statute from having private, pecuniary interests, either direct or indirect, in school district contracts that involve aggregate receipts or disbursements by the school district of more than \$15,000 in any year. Some limited exceptions to this prohibition are enumerated in the statutes. Significantly, abstaining from participation in particular board discussions and board votes does not always resolve this type of conflict. For example, bidding on certain school district contracts in one's private capacity while simultaneously holding office as a school board member can, by itself, trigger criminal liability under this statute. (see s. 946.13)

*Code of Ethics:* The Code of Ethics for Local Government Officials prohibits local public officials (including school board members) from engaging in specified conduct that might otherwise involve a conflict of interest, the improper use of a public position for personal gain, or other divided loyalties. For example, a local public official may neither (1) use his or her office to obtain financial gain or anything of substantial value for private benefit for himself or herself, or his or her immediate family, or for an organization with which he or she is associated; nor (2) take any official action substantially affecting a matter in which the official, a member of his or her immediate family, or an organization with which the official is associated has a substantial financial interest. (see s. 19.59)

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Notwithstanding the final January deadline for filing the forms that qualify a candidate to appear on the ballot, a candidate must also separately comply with the campaign finance registration requirement by no later than the time that he or she becomes a “candidate” as that term is defined by the campaign finance laws in Chapter 11 of the Wisconsin statutes. A person can become a “candidate” under Chapter 11 *prior to* the January ballot-access deadline.

The candidate(s) who are elected to the school board at the spring election must take and file the official, written oath of office *on or before* the 4th Monday in April. The oath of office does *not* have to be administered at or in connection with a school board meeting. Failure to take and file the oath by the deadline gives rise to a vacancy. The term of office begins on the 4th Monday in April.

***Q. What are some of the basic campaign finance requirements for candidates?***

As mentioned above, the campaign finance laws found in Chapter 11 of the Wisconsin statutes include the requirement that every person who meets the definition of a “candidate” must file a campaign finance registration statement with the school district clerk. Each candidate registers as a “candidate committee.” Requirements for designating a candidate committee treasurer and a depository (checking account) for campaign funds are also set out in Chapter 11.

While every school board candidate (defined to also include every actively serving school board member) must be registered, a candidate may claim an exemption from filing periodic financial reports. If a candidate declares on his or her current registration statement that he or she does not anticipate accepting contributions, making disbursements, or incurring obligations in an aggregate (i.e., combined total) amount exceeding \$2,500 in a calendar year, and if he or she does not actually exceed that dollar threshold, then the candidate’s committee is exempt from filing periodic financial reports. The reporting exemption does *not* encompass what is known as a termination report. See s. 11.0104 or visit the Ethics Commission website for more information (<https://ethics.wi.gov>).

Notwithstanding the \$2,500 aggregate threshold for claiming the reporting exemption, *all* candidates and their committees (including those who have claimed the reporting exemption) must adhere to the general limits that apply to contributions from specific sources, as further specified in Chapter 11. In addition, it is very important for candidate committees to understand that claiming the exemption from filing reports does *not* relieve the candidate and his or her candidate committee from other obligations imposed by the campaign finance laws. For example, *all* candidates and their committees must (1) track and keep adequate records of all receipts and disbursements, (2) include appropriate “paid for by” attribution statements on applicable campaign materials, and (3) eventually file a termination report at the appropriate time.







**Lake Country School District**  
1800 Vettelson Road, Hartland, WI 53029  
Phone: 262-367-3606 | FAX: 262-367-3205  
[www.mylakecountryschool.org](http://www.mylakecountryschool.org)

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## **Time Commitment of a Board of Education Member**

There are time commitments of Board Members to consider beyond meeting and meeting-preparation time such as school events, workshops, board member trainings and conventions, appearances on behalf of the district, etc. Here is a breakdown of the potential minimum time commitment for your consideration:

- A minimum of one 1-2 hour board meeting, once per month.
- A minimum of one 1-2 hour committee meeting per month.
- A potential 1-2 hour work session as needed.
- A minimum of 2 hours to review the electronic board packet before each meeting.

More information for new board members can be found [online here](https://wasb.org/wp-content/uploads/2017/03/board_service_program_2page.pdf).  
([https://wasb.org/wp-content/uploads/2017/03/board\\_service\\_program\\_2page.pdf](https://wasb.org/wp-content/uploads/2017/03/board_service_program_2page.pdf))

The Wisconsin Association of School Boards annually publishes a Guide for Candidates which states that “There are many qualifications and qualities that experienced school board members have indicated are important to school board membership.” One of which includes “A willingness to invest the hours that will be necessary to faithfully discharge their duties.”

For anyone who may be interested in becoming a board member, we recommend attending our board meetings and board committee meetings to observe. This proactive approach will provide valuable insight into the expected commitment of board members.

Thank you for your consideration, support, and commitment to the Lake Country School Community.

## **Current Board Members, Committees & Delegates**

President: Peter Maurer | [maurerp@mylakecountryschool.org](mailto:maurerp@mylakecountryschool.org) | 414.852.7317  
Vice President: Monique Henry | [henrym@mylakecountryschool.org](mailto:henrym@mylakecountryschool.org) | 262.352.4020  
Treasurer: Jhawn Newman | [newmanj@mylakecountryschool.org](mailto:newmanj@mylakecountryschool.org) | 262.337.0751  
Clerk: Steve Maurer | [maurersteve@mylakecountryschool.org](mailto:maurersteve@mylakecountryschool.org) | 414.587.6866  
Member: Matt Sherman | [shermanm@mylakecountryschool.org](mailto:shermanm@mylakecountryschool.org) | 262.337.0814

Policy Chairperson: Peter Maurer  
Finance Chairperson: Matt Sherman  
Building & Grounds Chairperson: Jhawn Newman  
Curriculum & Instruction Chairperson: Steve Maurer

WASB Convention Delegate: Monique Henry  
CESA #1 Convention Delegate: Peter Maurer

**Lake Country School District Policy Statement  
Series 100 - Board Operations**

**School District Mission**

**Policy #: 110  
(Previously 100.5)**

**The Lake Country School Mission Statement:**

To inspire all students to reach their highest potential by providing a tradition of academic excellence and innovative thinking within a supportive community.

**Belief Statements:**

We believe that:

1. All people have potential to learn and be successful.
2. The school will provide a positive learning environment that is safe, challenging, and rewarding.
3. The school community will promote self-esteem and confidence.
4. Learning is enhanced through an integrated relevant curriculum and high expectations.
5. Discipline will be consistent, timely, and carried out with dignity.
6. Students and staff will assume responsibility for themselves and their surroundings.
7. Students, staff and parents should acquire an appreciation for lifelong learning.
8. To be a successful district we need to plan for our future, be proactive in the present, and continually self-assess our effectiveness and sustainability.
9. The success of Lake Country School is in direct relation to the communication and collaboration of the community, parents, students, staff, Board of Education, and administration.

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Adopted by the School Board of Education August 23, 2005  
Revised by the School Board of Education August 22, 2011  
Revised by the School Board of Education September 6, 2016  
Realigned to WASB Policy Manual Coding System 2018

**Lake Country School District Policy Statement  
Series 100 - Board Operations**

**School Board Elections**

**Policy #: 131  
(Previously 200.06 & 200.07)**

A person is legally qualified to become a member of the Board of Education who is a United States citizen and a qualified voter of the school district.

In addition, it would be desirable that members of the Board of Education have a genuine interest in and devotion to public education, a willingness to give time and effort to the work, a capacity for understanding people, and the ability to work cooperatively with others.

Employees of the school district are precluded from serving on the School Board of Education by reason of statute making it unlawful for a director to receive compensation or reward for services to the district.

The Lake Country School Board of Education shall operate as a five member Board of Education. The term of a School Board of Education member is three years.

The District Clerk is responsible for overseeing the legality and orderliness of School Board of Education elections. The Clerk shall follow all procedures as provided by law.

These deadlines shall be followed:

1. Deadline for publishing school district election notice. The Clerk shall publish notice stating the time, place and manner of filing declarations of candidacy no later than the 1st Tuesday of December.
2. Deadline for filing declarations of candidacy. Declarations must be filed with the Clerk no later than 5 p.m. of the 1st Tuesday in January. Declarations shall be filed at the District Administrator's office at the Lake Country School District Office during regular office hours. Declarations of candidacy must be verified by the Clerk no later than 5 p.m. on the 2nd Tuesday in January.
3. Determining if a primary election is necessary. The Board of Education, at a regular or special meeting shall determine if a primary election is necessary after the deadline for filing declarations of candidacy but no later than 5 p.m. on the 2nd Tuesday in January. Once filed, a declaration may not be withdrawn.
4. Notice of School Board of Education primary. A Class I notice of the School Board of Education primary shall be published at least 7 days prior to the primary election. This notice shall include the following:
  - a. Primary election date, location of polling places and hours the polls will be open.
  - b. A sample ballot.
  - c. Voter eligibility.

If there are more than twice as many candidates as there are members to be elected, the Board of Education shall require a primary election.

5. Primary election. The primary election shall be held on the 3rd Tuesday in February. Primary ballots shall be counted by election officials. The Clerk shall receive all ballots after they have been counted, reported and secured. At 8 p.m. on the day following the completion of the canvass of the primary election, if held, the Clerk shall supervise the drawing of lots to determine the order in which the names of candidates are to be printed on the ballot.
6. Notice of School Board of Education elections. A Class I notice of the election shall be published at least 7 days prior to the spring election. This notice shall be similar to the primary election notice.
7. Spring election. The spring election shall be held on the 1st Tuesday in April. Votes shall be counted by election officials.
8. Notification of persons elected. The clerk shall notify persons elected within 8 days after the election. Prior to taking office, a School Board of Education member shall take and file the official oath.
9. School Board of Education members take office. Newly elected Board of Education members shall take office on the 4th Monday in April at a regular or special Board of Education meeting.

The School District shall bear all costs for School Board of Education elections. Ballots shall be provided by the district.

Voters shall be registered according to the registration requirements of their respective municipalities within the school district.

The primary and spring elections for School Board of Education members shall be conducted by the election officials for state and municipal elections. In a School Board of Education election held in conjunction with a State, municipal or judicial election, the polling places for the State, municipal or judicial election shall be the polling places for the School Board of Education election and the municipal election hours shall apply. If no State, municipal or judicial election is held on the date of the School Board of Education election, the election hours shall be between the hours of 8:00 a.m. and 8:00 p.m. The polling places normally used for State, municipal and judicial elections shall be used.

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Reference: Wis. Stat., 120.06 (Election of School Board of Education Members at Spring Election)

Adopted by the School Board of Education September 20, 1993

02/23/18 1st Reading of Revisions

03/12/18 2nd Reading of Revisions

Revised by the School Board of Education March 12, 2018

05/14/2018 1st Reading for revisions to combine 200.6 & 200.7 & Realign to WASB Policy Manual Coding System

06/11/2018 2nd Reading

**Lake Country School District Policy Statement  
Series 100 - Board Operations**

**Board Officers**

**Policy #: 141  
(Previously 200.12)**

Board of Education officers shall be elected at the annual organizational meeting of the Board of Education. The following are to be elected officers for the Board of Education: President, Vice-President, Clerk, and Treasurer.

**Duties of President**

The District President shall:

1. Countersign all orders as provided in Wis. Stats. 120.15.
2. Defend on behalf of the district all actions brought against it; prosecute, when authorized by district meeting or Board of Education, actions brought by the district.
3. Act as Chairman of Board of Education meetings and see that minutes of the meetings are properly recorded, approved and signed.
4. Perform such duties as provided by Wis. Statutes.
5. Decide all questions of parliamentary order subject to appeal by any member of the Board of Education.
6. Sign all documents as required on behalf of the Board of Education.
7. Appoint all committees as may be at any time provided by motion of the Board of Education, and shall be an ex-officio member of each and bring before the Board of Education from time to time whatever business may require its attention.
8. The President is entitled to have their vote counted on every issue before the Board of Education.
9. Countersign all orders for disbursement of district funds.
10. Bring before the Board of Education, from time to time, whatever business may require its attention.

**Duties of Vice-President**

The vice-president will:

1. Perform the duties assigned to the president in the event the latter's absence or inability to act.

**Duties of Clerk**

The clerk will:

1. Perform duties as required by law.
2. Attend meetings of the Board of Education and cause a complete and accurate record to be kept of all proceedings of Board of Education meetings
3. Receive all communications addressed to the Board of Education and report the same to the Board of Education.
4. Sign all documents which obligate the Board of Education in any respect and letters which advise of any obligations of the Board of Education.
5. Make and keep a list of all property belonging to the Board of Education.
6. File and preserve all reports, resolutions, and documents in a manner convenient for reference and deliver these to his/her successor.
7. Serve or cause to serve all required notices.
8. Cause all members of the Board of Education and District Administrator to be notified of special meeting at least 24 hours prior thereto.

## **Duties of Treasurer**

The treasurer will:

1. Perform such duties as are provided by Wis. Statutes.
2. Be held responsible for the proper keeping of school district accounts of all monies raised and apportioned for district. Order checks shall be signed by the President, Clerk, and Treasurer.
3. Cause to be entered into the account books all monies received and disbursed by him/her.
4. Present to the annual meeting a signed written statement of all monies received by him/her during the preceding year.
5. Cause to be deposited funds received by him/her in the name of the district in the public depository by the Board of Education.
6. Cause to be entered into the account books all monies received and disbursed according to the Uniform Financial Accounting System for Wisconsin School Districts.
7. Sign all district checks.
8. Prepare and present a tentative annual budget to the Board of Education by June 1st of each year, with the assistance of the District Administrator, and shall expect the District Administrator's assistance in explaining the budget at the Annual District Meeting.
9. Approve all bills, claims, and salaries, and shall make payment by check. District checks shall be signed by the Clerk, Treasurer, President, or one other member of the Board of Education.
10. Arrange for an audit of the financial records of the district.
11. Arrange for payment of Board of Education salaries to be paid at the April and October meetings.

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Reference: Wis. Stat. 120.15, Wis. Stat. 120.16, Wis. Stat. 120.17

Adopted by the School Board September 20, 1993

Reviewed by the School Board August 15, 2012

Realigned to WASB Policy Manual Coding System Spring/2018

**Lake Country School District Policy Statement  
Series 100 - Board Operations**

**Board Officers - Rule**

**Policy #: 141 - Rule  
(Previously 200.12 Rule)**

Voting for School Board officers shall normally be done by secret ballot. The officers shall be elected in the following order: President, Vice-President, Treasurer and Clerk.

The current Board President shall have the duty of presiding over the election of officers, unless he/she is no longer on the Board, in which case the Board shall appoint a temporary chair by majority vote for purposes of presiding over the election of officers. The Board President or other presiding officer shall appoint a member of the District staff to count any paper ballots used in connection with the election process and shall then confirm with the School Board the method of voting that will be used to elect officers. The election process, to be repeated as many times for each office as is necessary to elect the officer, shall be as follows:

1. The current Board President or other presiding officer shall make a call for nominations for the officer position to be elected. Any Board of Education member may nominate any eligible person for the office, including him/herself. Nominations need not be seconded. Additional nominees (including nominees who previously declined nomination or who withdrew from consideration during a prior round of voting) may be added prior to each new round of voting for the office, if such additional rounds of voting are needed.
2. The nominees (or any new nominee(s) added in a subsequent round of voting) shall be asked to accept or decline the nomination. If a nominee accepts the nomination, his/her name shall be included in the vote(s) for the officer position in question until such time as he/she may withdraw his/her name from consideration. If a nominee declines the nomination, his/her name is not included in the vote(s) for the position.
3. Once the nominees for the particular round of voting are clearly established, a vote shall be taken by the method specified above, or by such other method as is selected by a majority vote of the Board of Education at the outset of the organizational meeting. All Board of Education members who are participating in the meeting, including all nominees for the officer position in question, shall cast a vote. In the event that there is only one nominee for an office, the Board of Education may set aside any prior decision to use secret ballots by a showing of unanimous consent, and then conduct a voice vote or other type of vote to elect the officer.
4. If a nominee earns a majority of the votes cast for the officer position in question, that nominee shall be asked whether he/she accepts the position. If the victorious nominee accepts the position, the position is filled and the process begins anew for the next officer position until all officer positions are filled. If the victorious nominee declines the position, or if no nominee earns a majority of the votes cast, the voting process repeats for that position.

**Legal Reference**

**Wisconsin Statutes**

Section 17.13 [removal of officers]

Section 19.88(2) [election of officers by secret ballot]

Section 120.05 [election of board officers in common and union high school districts]

Section 120.06 [partial list of clerk duties related to school board elections]

Section 120.11(2) [special board meeting – clerk duties]

Section 120.15 [partial list of board president duties]

Section 120.16 [partial list of board treasurer duties]

Section 120.17 [partial list of board clerk duties]

Adopted by the School Board August 15, 2012

Realigned to WASB Policy Manual Coding System Spring, 2018



**Lake Country School District Policy Statement  
Series 100 - Board Operations**

**School Board Governance**

**Policy #: 150  
(Previously 200.4)**

The Board of Education shall serve as the policymaking body for the District, operate within state and federal laws, and do all things reasonable to promote the cause of education including establishing, providing and improving school district programs, functions and activities for the benefit of students.

Within these constraints, the Board of Education is required to function in these broad areas:

1. **Legislative and Policy Making:** The Board of Education is responsible for the development of policies to guide administrative action, and for employing a District Administrator to implement its policies.
2. **Education Planning:** The Board of Education is responsible for establishing educational goals which will guide both the Board of Education and the staff in working toward the continuing improvement of the educational program.
3. **Evaluation:** The Board of Education is responsible for the ongoing evaluation of the school program as related to the goals and objectives set forth by the Board of Education and by the State. The Board of Education is responsible for evaluation of the District Administrator.
4. **Provision of Financial Resources:** The Board of Education is responsible for adoption of a school budget which will enable the school district to carry out its responsibilities. All monies appropriated for school purposes shall be under the direction of Board of Education policy.
5. **Public Relations:** The Board of Education is responsible for providing adequate and direct means of keeping the local citizenry informed about the school, and for keeping itself and the staff informed about the needs and wishes of the public.

**DUTIES AND RESPONSIBILITIES OF THE BOARD OF EDUCATION:**

1. The Board of Education sets goals and policies that will guide the Board of Education and District Administrator.
2. The Board of Education shall, in cooperation with the District Administrator, adopt the District's annual operating budget and ensure there is adequate financing to achieve goals and that money is responsibly spent.
3. The Board of Education hires and manages one employee--the District Administrator. The Board of Education delegates to them the authority and responsibility to implement the Board of Education's policies and manage the District on a day-to-day basis.
4. The Board of Education allows the District Administrator to manage staff.
5. Board of Education members, in compliance with the open meetings law, attend meetings and actively serve on committees.
6. Board of Education members evaluate their role and performance, as well as that of the District Administrator, on a regular bases - identifying areas of strength and areas in need of improvement.

7. Board of Education members exercise the powers and discharge the specific duties imposed upon it by state law.

The Board of Education is responsible for adopting all major policies which affect the operation of the public schools.

Except as expressly provided by state law or as expressly authorized by the Board of Education (including through the Board of Education's duly-adopted policies), the members of the Board of Education exercise the duties and powers of the Board of Education as a collective body through motions, resolutions, and other official actions taken at Board of Education meetings. Accordingly, the primary power held by individual Board of Education members is the power to actively participate in and vote on matters that come before the Board of Education, provided that the Board of Education member is not abstaining from such participation and voting.

As an individual, a Board of Education member has no legal authority to bind the Board of Education since laws assign powers, duties and responsibilities to the Board of Education as a whole.

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### **Wisconsin Statutes**

[Section 118.001](#) [duties and powers of school Board of Education broadly construed]

[Section 120.12](#) [school Board of Education duties]

[Section 120.13](#) [school Board of Education powers]

Adopted by the Board of Education September 20, 1993

05/14/2018 1st Reading for Revisions & to Realign to WASB Policy Manual Coding System

06/11/2018 2nd Reading

**Lake Country School District Policy Statement  
Series 100 - Board Operations**

**Board Member Development Opportunities**

**Policy #: 163  
(Previously 200.35)**

In keeping with the need for continuing inservice training and development for its members, the Board of Education encourages the participation of all its members at appropriate school board conferences, workshops, and conventions. However, in order to control both the investment of time and funds necessary to implement this policy, the Board of Education establishes these principles and procedures for its guidance:

1. A calendar of school board conferences, conventions, and workshops shall be maintained by the District Administrator. The Board of Education will periodically decide which meetings appear to be most promising in terms of producing direct and indirect benefits to the School District.
2. Funds for participation at such meetings shall be budgeted for on an annual basis. When funds are limited, the Board of Education will designate which of its members should participate at a given meeting.
3. Board of Education members will be reimbursed for their travel expenses according to the existing policy for reimbursing professional staff members for travel.
4. When a conference, convention, or workshop is not attended by the full Board of Education, those who do participate will be requested to share information, recommendations and materials acquired at the meeting.

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Adopted by the School Board February 21, 1994  
Realigned to WASB Policy Manual Coding System Spring, 2018

**Lake Country School District Policy Statement  
Series 100 - Board Operations**

**Board Member Conduct/Ethics**

**Policy #: 165  
(Previously 200.09)**

The Board of Education is representative of all of the citizens in the Lake Country Area School District and is responsible for serving the best interests of the community, and its students, utilizing all available resources toward that goal. The oath of office requires that Board of Education members uphold the laws and constitution of the United States and the State of Wisconsin.

In addition, each member of the Lake Country School District Board of Education will support and operate under Board of Education policy bylaws, and rules, including the highest ethical standards. These shall include the following:

1. Recognize that Board of Education members should act in what is, in their opinion, conceived to be the best interests of the students and the entire community.
2. It is recognized that the function of the Board of Education is being legislative and judicial, and not administrative. The responsibilities for overall management and control of the property and affairs, including the development of policies, belong to the Board of Education while the responsibilities for the day-to-day operation of the school belong to the District Administrator and administrative staff in conformity with such Board of Education policies. Together, the Board of Education and administration must work to continually identify the needs, goals and priorities of the district.
3. Work with others on the Board of Education to crystallize the educational ideals, values, and goals of the community into concepts of policy and see to it that these are translated into actual practice by the District Administrator and staff.
4. Act on matters after seeking and receiving pertinent information and after full discussion by the Board of Education and the District Administrator.
5. Board of Education members shall refrain from making disparaging remarks in public about school personnel or other Board of Education members.
6. Recognize that authority to act rests with the entire Board of Education and that business shall be transacted only in official meetings; refrain from making commitments to individuals or organizations in behalf, or representing the opinion of the entire Board of Education of education.
7. Recognize that the administration of the school system is vested to the administration and no Board of Education member shall interfere with the administration of the school district as an individual or undermine the administrative, teaching, secretarial, or custodial staff by using his/her elective office by reverting to political or coercive means to force ideas on the personnel of the school district.
8. Recognize that actions of a Board of Education remain in effect until modified even though a Board of Education member may not have individually supported a motion; he/she will support

the action of the majority. Subordinate personal differences in order that actions of the Board of Education may be effective.

9. Require meetings of the Board of Education to be conducted on the basis of a planned agenda prepared by the Board of Education President and District Administrator consistent with the provisions of the Wisconsin Open Meeting Law. The agenda shall include such items as deemed necessary by the President and any members of the Board of Education in accordance with Board of Education policies. Agendas shall be made available, together with pertinent information relative to items contained in the agenda, to members of the Board of Education for study prior to the Board of Education meeting.
10. If possible, submit items to be placed on the agenda in ample time so that the District Administrator may assemble information concerning the subject.
11. Keep the District Administrator and fellow members of the Board of Education advised of community reaction to the school program and to school policies.
12. Listen courteously to questions and complaints and refer these comments to the District Administrator or building principals. After an investigation, the District Administrator or building principal will report the findings to the Board of Education member unless prohibited by state or federal law.
13. Refer personal requests and criticisms by employees directly to the District Administrator in accordance with the policies of the Board of Education. Complaints involving the District Administrator should be referred to the Board of Education President in accordance with applicable Board of Education policies.
14. Act on the selection, assignment, transfer, promotion, demotion, or dismissal of school personnel, both certified and support, only after submission of a recommendation by the District Administrator.
15. Participate in CESA, regional, state and national associations of school boards in service programs to become familiar with issues to best represent the district. The Board of Education members should be aware of educational issues.
16. Encourage open and frank discussions of all Board of Education members with the District Administrator in closed sessions of the Board of Education, as per Wisconsin Statutes, and that all information discussed in such sessions be kept confidential, except as otherwise required by law.
17. Board of Education members shall not use their office to obtain financial gain or anything of substantial value for their private benefit or for the benefit or for the benefit of their immediate family, or for any organization of which they are associated. This does not prohibit a Board of Education member from using the title or prestige of their position as a Board of Education member to obtain campaign contributions that are permitted and reported consistent with state law.

No Board of Education member shall solicit or accept from any person, directly or indirectly, anything of value if it could reasonably be expected to influence the Board of Education member's vote, official actions or judgements, or could reasonably be considered as a reward for any official action or inaction on the part of the Board of Education member.

A Board of Education member shall not take any official action substantially affecting a matter in which the Board of Education member, or a member of their immediate family or an organization in which the Board of Education member is associated has a substantial financial interest. Nor shall a Board of Education member use his or her position in a way that produces or assists in the production of a substantial benefit, direct or indirect, for the Board of Education member, or one or more members of the Board of Education member's immediate family either separately or together, or an organization with which the Board of Education member is associated. This paragraph does not prohibit a Board of Education member from taking any action concerning the lawful payment of salaries or employee benefits or reimbursement of actual and necessary expenses.

18. Encourage adequate information for the community concerning the school program.

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LEGAL REFERENCE: Wis. Stats 946.12,  
Wis. Stats. 946.13,  
Wis. Stats. 19.59  
Wis. Stats. 19.84  
Wis. Stats. 19.85

Adopted by the School Board of Education August 15, 2012  
Realigned to WASB Policy Manual Coding System Spring/2018

**Lake Country School District Policy Statement  
Series 100 - Board Operations**

**Board Meetings**

**Policy #: 170  
(Previously 200.15)**

**Regular School Board of Education Meetings:**

The Board of Education shall transact business only in a regular or other properly called meeting, of which every member has been notified in accordance with state law and Board of Education policy.

The Board of Education shall officially transact all business at legally convened meetings of the Board of Education. All meetings of the Board of Education shall be open to the public, except when provisions for closed sessions are met and deemed necessary. The Board of Education shall hold meetings in accordance with the Open Meetings Law.

**Special Board of Education Meeting:**

Special Board of Education meetings shall be held upon the request of any Board of Education member. Clerk or President shall notify each Board of Education member of the time and place of the special school Board of Education meeting in accordance with state law and Board of Education policy.

**Annual Board of Education Meeting:**

An annual meeting of the school district shall be held between May 15<sup>th</sup> and October 31<sup>st</sup> of each year at a location designated by the Board of Education. Such meetings shall include a financial review of the previous year, the receipts and expenditures estimated for the ensuing year and the amount needed to be raised by the local tax levy. In addition, other matters permitted under state law may be considered for action.

The Board of Education shall make every effort to schedule the meeting well in advance. An agenda shall be developed and public notice of the meeting shall be given in accordance with state law and established procedures.

**Executive (Closed) Session:**

The Board of Education may meet in executive session in accordance with state law. Public notice shall be given of all executive sessions. Only Board of Education members and those persons invited by the Board of Education may be present during executive sessions.

**Virtual Board Meetings in Emergency Situations:**

This policy defines procedures for calling, noticing, and conducting technology-facilitated School Board meetings that involve remote participation by Board members and/or the public's remote access to the meeting ("virtual meetings") in situations where conditions exist that make it potentially dangerous for the Board to convene in person or in the typical setting that is established for the Board's public meetings (e.g., where a number of people would be in direct proximity to one another). Examples of such dangerous conditions might include a natural disaster, a regional or national emergency, or a serious public health emergency as defined or declared by authorized public health officials, the state, and/or the federal government.

These procedures may be invoked for one or more meetings by a decision of the Board or, in the absence of any Board decision, upon the Board President's determination (in consultation, as needed, with the District Administrator and District legal counsel) that such dangerous conditions exist and that it is reasonably necessary and appropriate to hold one or more virtual meetings of the Board.

**Modified Content for the Public Notice of a Virtual Meeting**

When posting or otherwise giving public notice of a virtual Board meeting that is to occur under this policy, the District shall, in addition to all other content required by law, include the following information as part of the notice:

1. A statement that the meeting will be conducted as a virtual meeting due to an active emergency situation, meaning that multiple Board members may be participating in the meeting from remote locations through the use of communications technology and/or that public access to the meeting may be arranged through the use of technology.
2. Although the notice shall identify a physical location for the meeting, which shall normally be the location where at least the presiding officer and District Administrator are present, the notice shall also include a statement that the District discourages the public and/or media from attending the meeting in person at its noticed location due to concerns with health and safety and encourages use of the alternative method(s) of access that the District is providing.
3. Information that identifies how/where a member of the media or general public may access the meeting. For example, apart from any in-person attendance option that may be available, the District may provide access to the meeting via a live broadcast, via a video and/or audio streaming service, and/or via a telephone number for joining an audio conference. *Such meeting access information shall also appear in a prominent location on the District website.*
4. District contact information that a person may use to identify and communicate any special needs or any requests for accommodations related to accessing the meeting. This would include any person for whom it would be burdensome or infeasible to use the primary method(s) of remote access established by the District. *To the extent that doing so would not violate an order, decree, or declaration of a governmental authority, such an accommodation may include granting an exception to otherwise-applicable restrictions on in-person attendance at the meeting.*
5. At the direction of the Board or, in the absence of a Board decision, at the discretion of the Board President, the meeting notice may include an item of business during which the presiding officer or a designee will read all timely pre-submitted public comments that relate to one or more agenda items for the meeting. If the meeting notice includes such an item of business, then the notice shall further specify how and when to submit a comment to be read at the meeting. A submitted comment will be read at the meeting only if the author is sufficiently identified and the comment complies with the limitations that are normally applicable to verbal public comments at Board meetings (e.g., in regard to length, no prohibited content (e.g., obscenities, threats), etc.).

### **Conducting a Virtual Meeting of the School Board**

1. At least the presiding officer of the meeting and the District Administrator (or an administrative-level designee) shall normally be physically present at the meeting location identified in the public notice of the meeting. *Unless such presence would violate an order, decree, or declaration that has been issued by a governmental authority or would otherwise be infeasible due to extraordinary circumstances, it is the Board's preference and goal, but not strictly required by this policy in all circumstances, for at least a quorum of the Board to be physically present at the duly-noticed location of the meeting.*
2. Any Board members who are physically present at the posted meeting location will join the virtual meeting using the available technology platform(s). Any Board members who are not physically present at the meeting location will likewise join the meeting from their remote locations via such platform(s).
3. The presiding officer will formally convene the meeting.



- a. The presiding officer shall confirm that all Board members who are known to have attempted to join the meeting appear to have an adequate connection to enable their participation as authorized under this policy.
- b. The presiding officer shall confirm that the planned methods for allowing public access to the meeting appear to be functioning in a manner that allows for adequate and reasonable public access under the specific circumstances.
4. Quorums for any virtual meeting that is convened under these emergency procedures will be determined by counting the total number of Board members who are participating in the meeting, including both those physically present and those attending remotely via technology. A majority of the total members of the Board shall constitute a quorum. If, at any point, fewer than a majority of the Board members are able to participate, the meeting shall end for a lack of a quorum.
5. Unless the in-person attendance of the full Board is disallowed by an order, decree, or declaration that has been issued by a governmental authority having such jurisdiction, no Board member will be prohibited from attending a meeting under this policy in person at the duly-noticed location of the meeting. As a result:
  - a. In the absence of such an order, decree, or declaration, a Board member's decision to participate in a meeting remotely via technology under this policy is considered voluntary. If, for any reason, a Board member who voluntarily attempts to participate in such a meeting from a remote location is unable to establish or maintain his/her full participation (e.g., due to unforeseen technical difficulties), the meeting may continue without such Board member's participation as long as the Board continues to maintain a quorum of fully-participating Board members. If a Board member expresses concern over an agenda item, such item may be moved to the beginning of the agenda for discussion and vote.
  - b. If the in-person attendance of the full Board at the duly-noticed location of the meeting is disallowed by an order, decree, or declaration such that a Board member's participation from a remote location cannot be considered voluntary, and if any such Board member is unable to establish or maintain his/her full participation in the meeting from a remote location, the presiding officer shall call for a temporary recess in the meeting to allow the Board member a reasonable opportunity to establish or restore his/her access and participation. If the Board member's access issues cannot be adequately resolved, but the Board member also has not voluntarily withdrawn from the meeting, then the remaining members of the Board (provided that there is a quorum) shall make a determination whether or not to continue the meeting without the Board member, taking into account factors such as (1) the apparent reason(s) for the access issues; and (2) the time sensitivity and importance of any of the remaining items of business, including the feasibility of rescheduling some or all of the remaining agenda items of the meeting.
6. Board members who, under this policy, join and participate in a meeting remotely via technology may participate in open sessions of such virtual meetings to the same extent as if they were physically present, including discussing items of business and making and voting upon motions, except that Board members may not participate remotely in any evidentiary, due-process hearing, whether in open session or closed session, unless the Board affirmatively votes to permit such participation and has either (a) obtained the voluntary consent of the necessary parties to the hearing; or (b) determined, based on advice of counsel, that applicable law (including any order or decree issued to protect public health) requires the Board to allow such participation under the circumstances.
7. The Board's preferred setting and forum for conducting any closed session portion of a Board meeting is an in-person meeting, with a physical quorum of the Board being present and without the remote participation of any Board members. Accordingly:

- a. In the event that the Board considers a motion to convene in closed session during a virtual meeting held under this policy when either (1) a physical quorum of the Board is not present at the duly-noticed meeting location; or (2) there is an order, decree, or declaration related to the emergency that expressly prohibits the entire Board from attending the meeting in person, the presiding officer of the meeting shall poll each member of the Board who wishes to participate in the closed session from a remote location, and each such Board member will be asked to expressly affirm that the Board member has taken appropriate precautions to safeguard the privacy and integrity of the closed session, including but not limited to precautions that would reasonably ensure that the closed session is not being recorded without the Board's permission and that no non-authorized person can hear or access the discussions or other confidential information. The members of the Board may take the response(s) to the request for such affirmations into account in determining whether to authorize or potentially postpone the closed session.

### **Additional Statements Regarding the Scope and Application of this Policy**

1. In the event of the temporary absence or disability of the Board President, the Vice President shall, to the extent necessary, perform the duties and exercise the powers of the Board President under this policy. If the Vice President is also unavailable, the School Board Clerk shall do so.
2. This policy applies to both regular and special meetings of the Board. Minimum requirements for calling a regular or special meeting of the Board, as specified in state law, must still be satisfied in connection with meetings that are noticed and convened under this policy.
3. During meetings that involve the remote participation of any Board members, the Board will take appropriate measures to ensure accurate tallying and documentation of votes, which may include the regular use of roll call votes or other methods that clearly identify the votes of the individual Board members. No Board member who is absent from a meeting may ever vote by proxy.
4. All special voting requirements established by state law for taking particular action must still be satisfied. Such voting requirements are not affected by this policy.
5. If, at any time, the Board is made aware that the methods arranged for providing public access to a virtual meeting under this policy are not allowing adequate and reasonable public access under the specific circumstances, and if such issues cannot be remedied during a brief recess in the meeting, then the Board shall adjourn the meeting.
6. If a Board member has a concern related to the Board President's decision that a virtual meeting is reasonably necessary under this policy, or as to whether the Board should take up any particular item(s) of business at a virtual meeting, such concerns may be evaluated by the Board at the meeting via, for example, a motion to postpone some or all of the noticed agenda items for the meeting.
7. The Board authorizes the Board President to cancel any Board meeting that has been scheduled or noticed during the pendency of conditions that constitute an emergency situation under this policy (a) if necessary to comply with any mandatory decree, order, or declaration of a governmental authority, or (b) if the Board President determines that health and safety considerations related to the pending emergency situation outweigh any need for the Board to meet, such that the Board would still be able to meet any of its legal obligations (e.g., at a rescheduled meeting) and such that the interests of the District otherwise reasonably permit the cancellation of the meeting. A cancellation under this paragraph shall be effectuated by notifying all Board members and any relevant staff members of the cancellation and by withdrawing any public notice of the meeting and replacing such public notice with a notice of the cancellation (including notifying relevant media).

8. Except as otherwise expressly provided in this policy, the Board's normal policies and practices regarding (1) locations for board meetings; (2) quorum determinations; (3) a Board member's attendance at and possible remote participation in meetings; and (4) in-person public comment opportunities during Board meetings are temporarily suspended for purposes of a virtual Board meeting that is noticed and convened under this policy. However, once the emergency situation no longer exists, this policy no longer applies, and the Board's normal policies and practices regarding its meetings shall again govern subsequent meetings.
9. Subject to any Board decision to temporarily suspend the meetings of such bodies and to the judgment of the relevant presiding officer as to whether it is necessary and appropriate to attempt to hold a meeting, the Board authorizes its subunit committees and any other governmental bodies within the District to hold virtual meetings in compliance with the law and in substantial compliance with the procedures set forth in this policy, with the presiding officer of the applicable body serving in the roles this policy assigns to the Board President.
10. The requirements, procedures, and other provisions of this policy may be suspended or modified by a standard majority vote of the Board to the extent doing so would be consistent with applicable law, including any emergency relief, waiver, or exemption from an otherwise-applicable legal requirement that may be authorized by an appropriate governmental authority.

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LEGAL REF: Sections 65.90(4) Wisconsin Statutes  
19.83, 19.84, 19.85  
118.38  
120.08 (1), 120.10, 120.11(1) (2), 120.43  
Subch. V of Ch. 19  
252.02

(Formerly adopted as individual policies 200.15; 200.16 and 200.17)  
Approved: April 13, 2005  
Realigned to WASB Policy Manual Coding System Spring, 2018  
Revised 1st Reading to add virtual meetings 04/10/20  
Approved by the School Board Date 10/19/20

**Lake Country School District Policy Statement  
Series 100 - Board Operations**

**Board Committees**

**Policy #: 185  
(Previously 200.14)**

The Board of Education may have the following standing committees:

1. Curriculum and Instruction
2. Policy
3. Buildings & Grounds
4. Finance

The Board of Education may delegate portions of its exploratory, fact-finding, and preliminary work to temporary committees. These are advisory or ad hoc committees, however, and have no power to take action whatsoever, or to commit the Board of Education or District to any course of action, except as specifically directed by the Board of Education.

It shall be the duty of the President of the Board of Education to appoint committees, except when the Board of Education itself may decide otherwise. The first person named to any committee shall be considered the chairperson. It shall be the duty of the chairperson to convene the committee, and in the chairperson's absence or inability to act, the second named shall replace and perform the duties of the office.

The committees will be comprised of representatives from staff, administration, the Board of Education, and the larger school community (including students when and where appropriate), according to interest and/or need.

The President of the Board of Education and the District Administrator shall serve as ex-officio members of each committee, shall be notified of all committee meetings, and shall receive a copy of the minutes of each committee meeting.

**Job Description of Committee Chairperson:** The first person named to any committee shall be considered the chairperson. In the chairperson's absence or inability to act, the second named shall assume the chairperson's duties.

**The duties of the committee chairperson shall be:**

1. Convene all committee meetings.
2. Accept responsibility for communicating committee business, notifying committee members and all Board of Education members of the date, time, place and agenda of each committee meeting, and informing the administration of date, time, place and agenda of each committee meeting so the meeting can be properly noticed.
3. Accept responsibility for the recording of minutes of each committee meeting, submitting a copy of minutes to each committee member and all Board of Education members.
4. Inform each committee member at the first committee meeting of committee's responsibility, as stated in the by-laws, and the duties of committee membership.
5. Develop a yearly calendar for completion of committee's responsibilities relative to the calendar of the Board of Education.

6. Act as committee spokesperson or delegate to another committee member or appropriate administrator the responsibility for communicating with the public and press.
7. Maintain a file detailing the committee's responsibilities and progress throughout the year, passing on the file to the succeeding chairperson within two (2) weeks of the new chairperson's appointment.
8. Any other duties as directed by the Board of Education.

Operation of Committees: The committees shall operate as following:

1. Curriculum and Instruction Committee – advises the Board of Education on curriculum and instruction issues – especially new programs.
2. Policy Committee – revises and creates Board of Education policies that guide the operation of the school district.
3. Buildings & Grounds Committee - assists the Board of Education with budget and facility planning.
4. Finance Committee – assists the Board of Education with budget and facility planning and coordinates funding efforts for the district. Takes responsibility for negotiating a master contract with the teachers' union (AUTO) and takes into consideration personnel issues to be acted on by the Board of Education.

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Adopted by the School Board September 20, 1993

Revised/Approved – November 12, 2003

Realigned to WASB Policy Manual Coding System Spring, 2018

Revised/Approved - March 14, 2022



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# 2023-2024 ANNUAL MEETING & BUDGET HEARING

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**Monday, September 11, 2023 at 5:30 p.m.**  
in the Lake Country School Library  
1800 Vettelson Road, Hartland, WI

***Annual Report and Proposed Budget of***  
**LAKE COUNTRY SCHOOL DISTRICT of the**  
City of Delafield, Town of Delafield, Town of Merton, Village of Chenequa,  
Village of Hartland, and Village of Nashotah, Waukesha County, Wisconsin



## **2023-2024 LAKE COUNTRY SCHOOL DISTRICT**

### **Notice of Budget Hearing & Annual Meeting:**

Notice is hereby given to the qualified electors of the joint #1 District of The Villages of Nashotah, Hartland & Chenequa, Towns of Delafield & Merton & City of Delafield, that the Budget Hearing of said District will be held at 5:30 p.m., Monday, September 11, 2023, followed immediately by the Annual Meeting at Lake Country School District Library, 1800 Vettelson Road, Hartland, WI 53029. The Lake Country School Board of Education will be present. Information packets, including a summary of budget, will be available in the office beginning Wednesday, September 6, 2023. Steve Maurer, Clerk  
8/25/2023

Posted online at [www.MyLakeCountrySchool.org](http://www.MyLakeCountrySchool.org) > My School > Board of Education > Meeting Agendas

Posted online at [www.MyLakeCountrySchool.org](http://www.MyLakeCountrySchool.org) > School Links > Notice of Budget Hearing & Annual Meeting

Posted on Facebook and Twitter

Published in the West NOW 09/06/23

## LAKE COUNTRY SCHOOL DISTRICT

*Mission Statement: To inspire all students to reach their highest potential by providing a tradition of academic excellence and innovative thinking within a supportive community.*

Lake Country School District continues to be a school of choice throughout the greater Lake Country area. It is no wonder considering our exceptional test scores and low student-teacher ratios.

While student achievement is always our primary focus, developing well-rounded students who have a wide range of experiences is a tradition here. Our ongoing academic excellence and continued success is preparing students for a world that is dramatically different than when our new doors opened in 1993. The end goal in all of this is to encourage students to be engaged, responsible, lifelong learners.

### 2023-2024 Pupil Enrollment:

Resident Students: 333 (-4 students) + Open Enrolled In: 129 Students (-15 students)

Students Open Enrolled Out: 34 (+5 students)

**462 (-19 students) Total Students**

### 2022/2023 Highlights:

- Impressive School Report Card (21-22) with #1 ranking in the State of WI. Overall score of 93.5, Achievement score of 97.2, and Growth score of 80.3. The achievement score in Math (100) and ELA (94.4) was the same or higher than 99.7% of K-8 schools in the State.
- #1 ranking on Niche including #1 Best Public Elementary and Middle School and Teachers in WI, Milwaukee Area, and Waukesha County.
- Lake Country School's 5/6 and 7/8 math teams placed #1 in the small school's division at the Mega Math Meet.
- The school play, James and the Giant Peach was a success!
- Lake Country School Band played at the Admirals Game and Beyond the Notes at the Kalahari Band Festival.
- The ACE Performances and Art to Remember program will continue into the 2023-2024 School Year.





## LAKE COUNTRY SCHOOL BOARD OF EDUCATION

Board of Education meetings are typically held on the 3<sup>rd</sup> Monday of each month at 5:45 p.m. at Lake Country School. Additional Board meetings may be scheduled as needed. For more information, please visit the school website. [www.mylakecountryschool.org](http://www.mylakecountryschool.org)>>My School >> Board of Education



**Peter Maurer**  
**President**

Cell: 414-852-7317  
[maurerp@mylakecountryschool.org](mailto:maurerp@mylakecountryschool.org)  
2022-2025



**Monique Henry**  
**Vice President**

Cell: 262-352-4020  
[henrym@mylakecountryschool.org](mailto:henrym@mylakecountryschool.org)  
2018-2025



**Jhawn Newman**  
**Treasurer**

Cell: 262-337-0751  
[newmanj@mylakecountryschool.org](mailto:newmanj@mylakecountryschool.org)  
2021-2024



**Steve Maurer**  
**Clerk**

Cell: 414-587-6866  
[maurersteve@mylakecountryschool.org](mailto:maurersteve@mylakecountryschool.org)  
2022-2024



**Matt Sherman**  
**Member**

Cell: 262-337-0814  
[shermanm@mylakecountryschool.org](mailto:shermanm@mylakecountryschool.org)  
2023-2026

**COMMITTEES:** Policy (Pete), Curriculum (Steve), Building & Grounds (Jhawn), Finance (Matt)



**Lake Country School District**  
1800 Vettelson Road, Hartland, WI 53029  
Phone: 262-367-3606 | FAX: 262-367-3205  
[www.mylakecountryschool.org](http://www.mylakecountryschool.org)

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## **PERTINENT INFORMATION FOR THE LAKE COUNTRY SCHOOL DISTRICT**

### **Administrator:**

Chad E. Schraufnagel

262.367.3606 x114

### **Contacts:**

Melissa Schoeder, Director of Business Services  
Jordan Steger, Director of Buildings & Grounds  
Luanne Heil, Director of Food Service

262.367.3606 x106  
262.367.3606 x123  
262.367.3606 x124

### **School Depositories:**

Bank Five Nine, Hartland WI  
Town Bank, Hartland WI  
Local Government Investment Pool, Madison WI

### **School Auditors:**

Baker Tilly LLP, Milwaukee WI

### **School Attorney:**

Bob Butler, Wisconsin Association of School Boards

608.512.1703

**LAKE COUNTRY SCHOOL DISTRICT  
2023 BUDGET HEARING AGENDA  
SEPTEMBER 11, 2023  
5:30 P.M. - LAKE COUNTRY SCHOOL LIBRARY**

**AGENDA**

**I. CALL TO ORDER**

**This meeting will be called to order by the President of the School Board.**

**II. PRESENTATION AND HEARING ON THE BUDGET**

**A. Explanation and Discussion of Expenditures**

**B. Explanantion and Discussion of Revenues**

**C. Resident or Taxpayers to be heard**

ss. 65.90(4) - Not less than 10 days, after the publication of the proposed budget and the notice of hearing thereon a public hearing shall be held at the time and place stipulated at which any resident or taxpayer of the governmental unit shall have an opportunity to be heard on the proposed budget. The budget hearing may be adjourned from time to time. In school districts holding an annual meeting the time and place of the budget hearing shall be the time and place of the annual meeting.

**III. ADJOURN BUDGET HEARING**

**LAKE COUNTRY SCHOOL DISTRICT  
2023 ANNUAL MEETING AGENDA  
SEPTEMBER 11, 2023  
IMMEDIATELY FOLLOWING THE BUDGET HEARING - LAKE COUNTRY SCHOOL LIBRARY**

**AGENDA**

**1. CALL TO ORDER**

The meeting will be called to order by the President of the School Board who will serve as temporary chairperson during the election of the permanent chairperson.

- a. Pledge of Allegiance
- b. Introduction of School Board - Board President
- c. Status of the school district - Administrator

**2. ELECTION OF CHAIRPERSON**

Nominations shall be made from the floor as per section 120.10 (1) of Wisconsin State Statutes.

**3. OFFICIAL MINUTES OF THE MEETING**

The chairperson should appoint a person to take the minutes of the meeting. This person shall make a record of all motions and business of the meeting as per sections 120.10(1), (3) and 12.17 ss.

**4. MINUTES OF THE LAST ANNUAL MEETING**

The minutes of the September 12, 2022 Annual Meeting shall be approved. A copy of the minutes are included with this annual report. This is substituted for the reading of the minutes.

**5. AUDITOR AND TREASURER REPORT**

This electorate is able to act upon this by approving the report as read.

**6. OLD BUSINESS**

Any questions regarding last year's operation will be answered if possible.

**7. NEW BUSINESS**

- a. Resolution A - Adoption of the 2023-2024 Tax Levy (ss 120.10(8))
- b. Resolution B - Salaries of School Board Members (ss120.10(3))
- c. Resolution C - Authorization to provide reimbursement of expenses for School Board members.
- d. Resolution D - Authorization to provide free textbooks for students (ss120.10(15))
- e. Resolution E - Authorization to charge fee for Stay & Play (ss120.13(13))
- f. Resolution F - Authorization to furnish the National School Lunch program (ss 120.10(16))
- g. Resolution G - Authorization to retain legal counsel (ss 120.10(14))
- h. Resolution H - Authorization to expend Fund 80 Community Service Fund for operating expenses.
- i. Resolution I - Authorization for the School Board to set the time and date for the 2024 Annual Meeting (ss 120.08(4))

**8. ADJOURN**

**2023 Annual Meeting Resolutions**

State regulations require that a number of resolutions be acted upon each year at the Annual Meeting. Approval of these resolutions gives the School Board the necessary legal authority to operate the school during the coming year. These resolutions are as follows:

**A. Adoption of the 2023-2024 Tax Levy (ss 120.10(8))**

Be it resolved that a tax for the operation and maintenance of the schools in the amount of \$4,124,977 shall be levied against the taxable property of the District for the 2023-24 school year.

Motion by: \_\_\_\_\_ Seconded by: \_\_\_\_\_

Action: \_\_\_\_\_

**B. Salaries of School Board Members (ss120.10(3))**

Be it resolved that the salary for each board member is \$1,100.00.

Motion by: \_\_\_\_\_ Seconded by: \_\_\_\_\_

Action: \_\_\_\_\_

**C. Authorization to provide reimbursement of expenses for School Board members.**

Be it resolved that payment of actual and necessary expenses of School Board members be reimbursed.

Motion by: \_\_\_\_\_ Seconded by: \_\_\_\_\_

Action: \_\_\_\_\_

**D. Authorization to provide free textbooks for students (ss120.10(15))**

Be it resolved that the School Board is authorized to furnish free textbooks to students who attend Lake Country School District.

Motion by: \_\_\_\_\_ Seconded by: \_\_\_\_\_

Action: \_\_\_\_\_

**E. Authorization to charge fee for 4K Stay & Play.**

Be it resolved that the School Board is authorized to charge a fee of \$26/day to students who attend Lake Country School District. This fee may be waived if family meets income eligibility guidelines for free or reduced lunch.

Motion by: \_\_\_\_\_ Seconded by: \_\_\_\_\_

Action: \_\_\_\_\_

**F. Authorization to furnish the National School Lunch program (ss 120.10(16))**

Be it resolved that the School Board is authorized to furnish school lunch per the National School Lunch program to the pupils of the Lake Country School District and to appropriate funds for that purpose.

Motion by: \_\_\_\_\_ Seconded by: \_\_\_\_\_

Action: \_\_\_\_\_

**G. Authorization to retain legal counsel (ss 120.10(14))**

Be it resolved that the School Board be authorized to retain and pay legal counsel as deemed appropriate by the board.

Motion by: \_\_\_\_\_ Seconded by: \_\_\_\_\_

Action: \_\_\_\_\_

**H. Authorization to expend Fund 80 Community Service Fund for a portion of operating expenses.**

Be it resolved that the School Board be authorized to expend up to \$56,081 to and from the Fund 80 Community Service Fund for a portion of operating expenses for evening custodians and other building costs.

Motion by: \_\_\_\_\_ Seconded by: \_\_\_\_\_

Action: \_\_\_\_\_

**I. Authorization for the School Board to set the time and date for the 2024 Annual Meeting.**

Be it resolved that the School Board is authorized in compliance with State Statutes governing the same to set the time and date for the 2024 Annual Meeting as Monday, September 16, 2024 at 5:30 p.m.

Motion by: \_\_\_\_\_ Seconded by: \_\_\_\_\_

Action: \_\_\_\_\_

**Lake Country School District**  
**2022 BUDGET HEARING & ANNUAL SCHOOL DISTRICT MEETING MINUTES**

**Public Notice** is hereby given to the public and news media pursuant to Chapter 19, Subchapter IV, Wisconsin Statutes that a Budget Hearing and Annual School District Meeting will be held on **Monday, September 12, 2022 at 5:30 p.m.** in the Lake Country School Conference Room, 1800 Vettelson Road, Hartland, WI 53029, located in the City of Delafield, Waukesha County. If any special needs or any requests for accommodations related to accessing the meeting please contact Nicole Brown, District Secretary at: 262.367.3606 x108. *Some board members will be attending remotely and the board member's remote attendance can be monitored by those who are physically present at the meeting.*

The Agenda for the meeting is as follows:

**AGENDA**

**Monique Henry called the meeting to order at 5:30 p.m.**

The meeting will be called to order by the President of the School Board who will serve as temporary chairperson during the election of the permanent chairperson.

- a. Discussion and potential action to suspend policy 170 regarding the remote participation of a board member.

*Motion to suspend policy 170 regarding the remote participation of a board member. (Larson/P Maurer) Peter Maurer questioned if this will only be for the Annual Meeting. Monique Henry responded that this can occur on rare occasions at other meetings; however the Board will have to vote on each occasion to allow it. 4-0*

- b. Discussion and potential action to allow the remote participation of Jhawn Newman. The board member will be able to participate and vote in the open and closed session portions of the meetings. The public will be able to monitor, see, and hear the board member during the open session.

*Motion to allow the remote participation of Jhawn Newman. The board member will be able to participate and vote in the open and closed session portions of the meetings. The public will be able to monitor, see, and hear the board member during the open session. (Larson/S Maurer) Steve questioned remote participation. Monique Henry responded that the treasurer is needed for the Annual Meeting. 4-0*

*Jhawn Newman was called and placed on speaker.*

- c. Pledge of Allegiance

*The pledge of allegiance was recited.*

- d. Introduction of School Board - Board President

*Monique Henry introduced herself as president followed by other members stating their name and board position.*

- e. Status of the school district - Administrator

*Chad Schraufnagel spoke on the status of the school district including the purpose of the budget, key points of the budget, impact of State/Federal decisions, strengths of the district (faculty, community, parents, relationships), and upcoming goals (facilities, professional development, student achievement, communications, and relationships)*

**2. ELECTION OF CHAIRPERSON**

Nominations shall be made from the floor as per section 120.10 (1) of Wisconsin State Statutes.

*Al Laron nominated Monique Henry as chairperson. Peter Maurer seconded the motion. 5-0*

**3. APPROVAL OF AGENDA**

*Motion to adopt the agenda (Newman/Larson) 5-0*

**4. APPROVAL OF MINUTES FROM THE SEPTEMBER 7, 2021 BUDGET & ANNUAL MEETING**

*Motion to approve the minutes from the September 7, 2021 Budget & Annual Meeting (S Maurer/Larson) 5-0*

**5. PRESENTATION AND APPROVAL OF TREASURER'S REPORT (MOTION)**

*Motion to present and approve the treasurer's report (P Maurer/Newman) 5-0 Jenny Oman, Director of Business Services presented and explained the treasurer's report stating there is a decrease in revenue, increase in Special Education and staffing costs. She stated that districts should avoid taking more than 15% of Fund Balance. Audit will be final in October. Chad Schraufnagel added that although it's not easy to do, the goal of any district should avoid short term borrowing whenever possible and instead balance the budget to avoid interest payments.*

**6. PRESENTATION OF THE 2022-2023 BUDGET - HEARING ON THE BUDGET**

- a. Purpose: Section 65.90(4) of the Wisconsin State Statutes requires that "any resident or taxpayer of the governmental unit shall have an opportunity to be heard" at the budget hearing. The Board of Education of the Lake Country School District encourages input from the public, and will consider recommendations from the meeting as any necessary modifications in the proposed budget are made by the Board of Education prior to the 4th Monday in October. The approval of a final budget resolution is expected to take place at a scheduled Board meeting on October 17, 2022.

*Motion to present and discuss the 2022-2023 budget (Larson/S Maurer) 5-0*

*Jenny Oman, Director of Business Services went through the budget publication and asked if there were any questions? Peter Maurer asked about Esser Funds. Chad Schraufnagel responded that the funds have not all been allocated yet.*

**7. RESOLUTIONS (MOTIONS FOR EACH)**

- a. Adoption of the 2022-2023 Tax Levy (ss 120.10(8)) **5-0 See Resolution**
- b. Salaries of School Board Members (ss120.10(3)) **5-0 See Resolution**
- c. Authorization to provide reimbursement of expenses for School Board members. **5-0 See Resolution**
- d. Authorization to provide free textbooks for students (ss120.10(15)) **5-0 See Resolution**
- e. Authorization to furnish the National School Lunch program (ss 120.10(16)) **5-0 See Resolution**
- f. Authorization to retain legal counsel (ss 120.10(14)) **5-0 See Resolution**
- g. Authorization to expend Fund 80 Community Service Fund for operating expenses. **5-0 See Resolution**
- h. Authorization for the School Board to set the time and date for the 2023 Annual Meeting (ss 120.08(4)) **5-0 See Resolution**
- i. Authorization for the School Board to lease school property to the YMCA. **5-0 See Resolution**

**8. Motion to adjourn at 6:05 p.m. (Larson/S Maurer) 5-0**

Respectfully submitted, Nicole Brown, District Secretary  
Reviewed by Al Larson, Clerk **September 15, 2022**



## **2022 Annual Meeting Resolutions**

State regulations require that a number of resolutions be acted upon each year at the Annual Meeting. Approval of these resolutions gives the School Board the necessary legal authority to operate the school during the coming year. These resolutions are as follows:

**A. Adoption of the 2022-2023 Tax Levy (ss 120.10(8))**

Be it resolved that a tax for the operation and maintenance of the schools in the amount of \$4,023,783 shall be levied against the taxable property of the District for the 2022-23 school year.

Motion by: Steve Maurer Seconded by: Al Larson

Action: 5-0

**B. Salaries of School Board Members (ss120.10(3))**

Be it resolved that the salary for each board member is \$1,100.00.

Motion by: Al Larson Seconded by: Peter Maurer

Action: 5-0

**C. Authorization to provide reimbursement of expenses for School Board members.**

Be it resolved that payment of actual and necessary expenses of School Board members be reimbursed.

Motion by: Jhawn Newman Seconded by: Peter Maurer

Action: Steve Maurer questioned what items? Monique Henry responded that typically the only expenses that come up are training or conferences. 5-0

**D. Authorization to provide free textbooks for students (ss120.10(15))**

Be it resolved that the School Board is authorized to furnish free textbooks to students who attend Lake Country School District.

Motion by: Steve Maurer Seconded by: Peter Maurer

Action: 5-0

**E. Authorization to furnish the National School Lunch program (ss 120.10(16))**

Be it resolved that the School Board is authorized to furnish school lunch per the National School Lunch program to the pupils of the Lake Country School District and to appropriate funds for that purpose.

Motion by: Al Larson Seconded by: Jhawn Newman

Action: Steve Maurer questioned if this was the free lunch being offered due to COVID. Chad Schraufnagel responded that no, it was the district's lunch program with paid and free/reduced. 5-0

**F. Authorization to retain legal counsel (ss 120.10(14))**

Be it resolved that the School Board be authorized to retain and pay legal counsel as deemed appropriate by the board.

Motion by: Al Laron Seconded by: Steve Maurer

Action: Peter Maurer questioned if this limited who the board could use. Monique Henry responded that the motion is not stating a specific attorney so no. 5-0

**G. Authorization to expend Fund 80 Community Service Fund for a portion of operating expenses.**

Be it resolved that the School Board be authorized to expend up to \$56,081 to and from the Fund 80 Community Service Fund for a portion of operating expenses for evening custodians and other building costs.

Motion by: Peter Maurer Seconded by: Jhawn Newman

Action: 5-0

**H. Authorization for the School Board to set the time and date for the 2023 Annual Meeting.**

Be it resolved that the School Board is authorized in compliance with State Statutes governing the same to set the time and date for the 2023 Annual Meeting as Monday, September 12, 2023 at 5:30 p.m.

*Motion was read to with date corrected to Monday, September 11, 2023*

Motion by: Al Larson Seconded by: Peter Maurer

Action: 5-0

**I. Authorization for the School Board to lease school property to the YMCA.**

Be it resolved that the School Board be authorized to lease the building to the YMCA.

Motion by: Steve Maurer   Seconded by: Peter Maurer

Action: 5-0



Lake Country School District  
1800 Vettelson Road, Hartland, WI 53029  
Phone: 262-367-3606 | FAX: 262-367-3205  
www.mylakecountryschool.org

**Lake Country School District  
2022-2023 Treasurer’s Report**

In the summer of 2023, Baker Tilly LLP of Milwaukee, WI, audited the district’s financial activities for 2022-2023. The completion of the final audit is projected at the end of October. Upon completion, the 2022-2023 audit report will be available in the district business office for review.

**2022-2023 FINANCIAL SUMMARY**

An examination of General Fund 10 indicates approximately 64% of all revenues in 2022-20223, for general operating expenses, were form the tax levy. State aid, Federal aid and other government revenue sources made up approximately 36% of the rest of the revenue sources. (i.e., interest on investments local fees, etc.)

**As of June 30, 2023**

General Fund 10 Fund Balance as of July 1, 2022 (Acct 930000 and 938900). . . . . \$794,799.00  
General Fund Balance as of June 30, 2023 (Acct 930000 and 938900). . . . . \$727,726.68

The 2022-2023 ending General Fund 10 Balance demonstrates a decrease of \$67,072.32 in the District’s designated working cash balance. It is important to ensure an adequate reserve of assets, as an adequate fund balance affords the Lake Country School District an opportunity to demonstrate financial stability.

Respectfully Submitted,  
Mr. Jhawn Newman, Treasurer  
Lake Country School District

**Informational: School District Fund Balance**

Accounts are summarized on a balance sheet as Assets, Liabilities and Fund Balance

The District’s Fund Balance Represents:

Beginning Fund Balance + Total Assets of a fund – Total Liabilities of a fund = Ending Fund Balance

An adequate reserve of assets permits our district to:

- Accumulate enough assets to make designated purchases (i.e., capital projects)
- Avoid excessive short-term borrowing to operate the district until tax money is received
- Preserve a high bond rating
- Avoid spending operational funds for interest payments



**Lake Country School District**  
 1800 Vettelson Road, Hartland, WI 53029  
 Phone: 262-367-3606 | FAX: 262-367-3205  
[www.mylakecountryschool.org](http://www.mylakecountryschool.org)

**Lake Country School District  
 2022-2023 Treasurer's Report**

<b>GENERAL FUND 10</b>	Unaudited 2022-23
Beginning Fund Balance	\$ 794,799.00
Total Revenues	\$ 6,388,763.86
Total Expenses	\$ 6,455,836.18
Ending Fund Balance	\$ 727,726.68
<b>SPECIAL DONATIONS FUND 21</b>	Unaudited 2022-23
Beginning Fund Balance	\$ 30,725.68
Total Revenues	\$ 169,319.40
Total Expenses	\$ 63,878.40
Ending Fund Balance	\$ 136,166.68
<b>SPECIAL EDUCATION FUND 27</b>	Unaudited 2022-23
Beginning Fund Balance	\$ -
Total Revenues	\$ 852,404.14
Total Expenses	\$ 852,404.14
Ending Fund Balance	\$ -
<b>FOOD SERVICE FUND 50</b>	Unaudited 2022-23
Beginning Fund Balance	\$ 137,233.53
Total Revenues	\$ 228,635.95
Total Expenses	\$ 204,944.40
Ending Fund Balance	\$ 160,925.08
<b>COMMUNITY SERVICE FUND 80</b>	Unaudited 2022-23
Beginning Fund Balance	\$ -
Total Revenues	\$ 56,081.00
Total Expenses	\$ 39,587.05
Ending Fund Balance	\$ 16,493.95
<b>COOPERATIVE PROGRAM FUND 90</b>	Unaudited 2022-23
Beginning Fund Balance	\$ -
Total Revenues	\$ 170,359.66
Total Expenses	\$ 170,359.66
Ending Fund Balance	\$ -

**BUDGET PUBLICATION, 2023-24**  
**Lake Country School District**

<b>GENERAL FUND</b>	<b>Audited 2021-22</b>	<b>Unaudited 2022-23</b>	<b>Budget 2023-24</b>
Beginning Fund Balance	873,547.37	794,799.00	727,726.68
<b>Ending Fund Balance</b>	<b>794,799.00</b>	<b>727,726.68</b>	<b>330,301.68</b>
<b>REVENUES &amp; OTHER FINANCING SOURCES</b>			
Transfers-In (Source 100)	0.00	0.00	0.00
Local Sources (Source 200)	4,115,530.27	4,264,330.08	4,209,747.00
Inter-district Payments (Source 300 + 400)	1,252,813.00	1,178,849.00	1,109,042.00
Intermediate Sources (Source 500)	0.00	0.00	0.00
State Sources (Source 600)	429,638.12	428,081.56	398,467.00
Federal Sources (Source 700)	166,567.50	485,576.24	147,453.00
All Other Sources (Source 800 + 900)	24,232.16	31,926.98	0.00
<b>TOTAL REVENUES &amp; OTHER FINANCING SOURCES</b>	<b>5,988,781.05</b>	<b>6,388,763.86</b>	<b>5,864,709.00</b>
<b>EXPENDITURES &amp; OTHER FINANCING USES</b>			
Instruction (Function 100 000)	3,606,077.41	3,596,174.67	3,287,923.00
Support Services (Function 200 000)	1,783,383.83	1,991,617.06	1,984,919.00
Non-Program Transactions (Function 400 000)	678,068.18	868,044.45	989,292.00
<b>TOTAL EXPENDITURES &amp; OTHER FINANCING USES</b>	<b>6,067,529.42</b>	<b>6,455,836.18</b>	<b>6,262,134.00</b>

<b>SPECIAL PROJECTS FUND</b>	<b>Audited 2021-22</b>	<b>Unaudited 2022-23</b>	<b>Budget 2023-24</b>
Beginning Fund Balance	474.68	30,725.68	136,166.68
<b>Ending Fund Balance</b>	<b>30,725.68</b>	<b>136,166.68</b>	<b>28,576.68</b>
<b>REVENUES &amp; OTHER FINANCING SOURCES</b>	<b>921,038.28</b>	<b>1,021,723.54</b>	<b>977,300.00</b>
<b>EXPENDITURES &amp; OTHER FINANCING USES</b>	<b>890,787.28</b>	<b>916,282.54</b>	<b>1,084,890.00</b>

<b>DEBT SERVICE FUND</b>	<b>Audited 2021-22</b>	<b>Unaudited 2022-23</b>	<b>Budget 2023-24</b>
Beginning Fund Balance	0.00	0.00	0.00
<b>Ending Fund Balance</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>REVENUES &amp; OTHER FINANCING SOURCES</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>EXPENDITURES &amp; OTHER FINANCING USES</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>

<b>CAPITAL PROJECTS FUND</b>	<b>Audited 2021-22</b>	<b>Unaudited 2022-23</b>	<b>Budget 2023-24</b>
Beginning Fund Balance	0.00	0.00	0.00
<b>Ending Fund Balance</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>REVENUES &amp; OTHER FINANCING SOURCES</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>EXPENDITURES &amp; OTHER FINANCING USES</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>

<b>FOOD SERVICE FUND</b>	<b>Audited 2021-22</b>	<b>Unaudited 2022-23</b>	<b>Budget 2023-24</b>
Beginning Fund Balance	58,416.20	137,233.53	160,925.08
<b>Ending Fund Balance</b>	<b>137,233.53</b>	<b>160,925.08</b>	<b>142,183.08</b>
<b>REVENUES &amp; OTHER FINANCING SOURCES</b>	<b>342,444.38</b>	<b>228,635.95</b>	<b>175,409.00</b>
<b>EXPENDITURES &amp; OTHER FINANCING USES</b>	<b>263,627.05</b>	<b>204,944.40</b>	<b>194,151.00</b>

<b>COMMUNITY SERVICE FUND</b>	<b>Audited 2021-22</b>	<b>Unaudited 2022-23</b>	<b>Budget 2023-24</b>
Beginning Fund Balance	0.00	0.00	16,493.95
<b>Ending Fund Balance</b>	<b>0.00</b>	<b>16,493.95</b>	<b>9,270.95</b>
<b>REVENUES &amp; OTHER FINANCING SOURCES</b>	<b>56,081.00</b>	<b>56,081.00</b>	<b>56,081.00</b>
<b>EXPENDITURES &amp; OTHER FINANCING USES</b>	<b>56,081.00</b>	<b>39,587.05</b>	<b>63,304.00</b>

<b>PACKAGE &amp; COOPERATIVE PROGRAM FUND</b>	<b>Audited 2021-22</b>	<b>Unaudited 2022-23</b>	<b>Budget 2023-24</b>
Beginning Fund Balance	0.00	0.00	0.00
<b>Ending Fund Balance</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>REVENUES &amp; OTHER FINANCING SOURCES</b>	<b>26,503.15</b>	<b>170,359.66</b>	<b>11,970.00</b>
<b>EXPENDITURES &amp; OTHER FINANCING USES</b>	<b>26,503.15</b>	<b>170,359.66</b>	<b>11,970.00</b>

**Total Expenditures and Other Financing Uses**

<b>ALL FUNDS</b>	<b>Audited 2021-22</b>	<b>Unaudited 2022-23</b>	<b>Budget 2023-24</b>
<b>GROSS TOTAL EXPENDITURES -- ALL FUNDS</b>	7,304,527.90	7,787,009.83	7,616,449.00
Interfund Transfers (Source 100) - ALL FUNDS	409,547.18	0.00	0.00
Refinancing Expenditures (FUND 30)	0.00	0.00	0.00
<b>NET TOTAL EXPENDITURES -- ALL FUNDS</b>	<b>6,894,980.72</b>	<b>7,787,009.83</b>	<b>7,616,449.00</b>
<b>PERCENTAGE INCREASE - NET TOTAL FUND EXPENDITURES FROM PRIOR YEAR</b>		<b>12.94%</b>	<b>-2.19%</b>

**PROPOSED PROPERTY TAX LEVY**

<b>FUND</b>	<b>Audited 2021-22</b>	<b>Unaudited 2022-23</b>	<b>Budget 2023-24</b>
General Fund	3,974,475.00	4,074,655.00	4,068,896.00
Referendum Debt Service Fund	0.00	0.00	0.00
Non-Referendum Debt Service Fund	0.00	0.00	0.00
Capital Expansion Fund	0.00	0.00	0.00
Community Service Fund	56,081.00	56,081.00	56,081.00
<b>TOTAL SCHOOL LEVY</b>	<b>4,030,556.00</b>	<b>4,130,736.00</b>	<b>4,124,977.00</b>
<b>PERCENTAGE INCREASE -- TOTAL LEVY FROM PRIOR YEAR</b>		<b>2.49%</b>	<b>-0.14%</b>

**BUDGET ADOPTION 2023-24\* Lake Country School District**

	Audited 2021-22	Unaudited 2022-23	Budget 2023-24
<b>GENERAL FUND (FUND 10)</b>			
Beginning Fund Balance (Account 930 000)	873,547.37	794,799.00	727,726.68
Ending Fund Balance, Nonspendable (Acct. 935 000)	0.00	0.00	0.00
Ending Fund Balance, Restricted (Acct. 936 000)	0.00	0.00	0.00
Ending Fund Balance, Committed (Acct. 937 000)	0.00	0.00	0.00
Ending Fund Balance, Assigned (Acct. 938 000)	20,053.06	20,053.06	20,053.06
Ending Fund Balance, Unassigned (Acct. 939 000)	774,745.94	774,745.94	707,673.62
<b>TOTAL ENDING FUND BALANCE (ACCT. 930 000)</b>	<b>794,799.00</b>	<b>727,726.68</b>	<b>330,301.68</b>
<b>REVENUES &amp; OTHER FINANCING SOURCES</b>			
100 Transfers-in	0.00	0.00	0.00
<b>Local Sources</b>			
210 Taxes	3,974,475.00	4,074,655.00	4,068,896.00
240 Payments for Services	0.00	0.00	0.00
260 Non-Capital Sales	0.00	0.00	0.00
270 School Activity Income	18,779.31	21,475.26	1,000.00
280 Interest on Investments	590.17	9,445.59	10,627.00
290 Other Revenue, Local Sources	121,685.79	158,754.23	129,224.00
<b>Subtotal Local Sources</b>	<b>4,115,530.27</b>	<b>4,264,330.08</b>	<b>4,209,747.00</b>
<b>Other School Districts Within Wisconsin</b>			
310 Transit of Aids	0.00	0.00	0.00
340 Payments for Services	1,252,813.00	1,178,849.00	1,109,042.00
380 Medical Service Reimbursements	0.00	0.00	0.00
390 Other Inter-district, Within Wisconsin	0.00	0.00	0.00
<b>Subtotal Other School Districts within Wisconsin</b>	<b>1,252,813.00</b>	<b>1,178,849.00</b>	<b>1,109,042.00</b>
<b>Other School Districts Outside Wisconsin</b>			
440 Payments for Services	0.00	0.00	0.00
490 Other Inter-district, Outside Wisconsin	0.00	0.00	0.00
<b>Subtotal Other School Districts Outside Wisconsin</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>Intermediate Sources</b>			
510 Transit of Aids	0.00	0.00	0.00
530 Payments for Services from CCDEB	0.00	0.00	0.00
540 Payments for Services from CESA	0.00	0.00	0.00
580 Medical Services Reimbursement	0.00	0.00	0.00
590 Other Intermediate Sources	0.00	0.00	0.00
<b>Subtotal Intermediate Sources</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>State Sources</b>			
610 State Aid -- Categorical	24,565.00	29,841.89	20,700.00
620 State Aid -- General	27,392.00	23,283.00	19,791.00
630 DPI Special Project Grants	13,768.77	16,238.32	0.00
640 Payments for Services	0.00	0.00	0.00
650 Student Achievement Guarantee in Education (SAGE Grant)	0.00	0.00	0.00
660 Other State Revenue Through Local Units	0.00	0.00	0.00
690 Other Revenue	363,912.35	358,718.35	357,976.00
<b>Subtotal State Sources</b>	<b>429,638.12</b>	<b>428,081.56</b>	<b>398,467.00</b>
<b>Federal Sources</b>			
710 Federal Aid - Categorical	0.00	0.00	0.00
720 Impact Aid	0.00	0.00	0.00
730 DPI Special Project Grants	63,187.76	404,642.20	130,439.00
750 IASA Grants	31,088.96	16,754.99	17,014.00
760 JTPA	0.00	0.00	0.00
770 Other Federal Revenue Through Local Units	0.00	0.00	0.00
780 Other Federal Revenue Through State	72,290.78	64,179.05	0.00
790 Other Federal Revenue - Direct	0.00	0.00	0.00
<b>Subtotal Federal Sources</b>	<b>166,567.50</b>	<b>485,576.24</b>	<b>147,453.00</b>
<b>Other Financing Sources</b>			
850 Reorganization Settlement	0.00	0.00	0.00



<b>BUDGET ADOPTION 2023-24* Lake Country School District</b>			
	<b>Audited 2021-22</b>	<b>Unaudited 2022-23</b>	<b>Budget 2023-24</b>
860 Compensation, Fixed Assets	0.00	0.00	0.00
870 Long-Term Obligations	0.00	0.00	0.00
<b>Subtotal Other Financing Sources</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>Other Revenues</b>			
960 Adjustments	0.00	0.00	0.00
970 Refund of Disbursement	24,231.69	31,926.98	0.00
980 Medical Service Reimbursement	0.00	0.00	0.00
990 Miscellaneous	0.47	0.00	0.00
<b>Subtotal Other Revenues</b>	<b>24,232.16</b>	<b>31,926.98</b>	<b>0.00</b>
<b>TOTAL REVENUES &amp; OTHER FINANCING SOURCES</b>	<b>5,988,781.05</b>	<b>6,388,763.86</b>	<b>5,864,709.00</b>
<b>EXPENDITURES &amp; OTHER FINANCING USES</b>			
<b>Instruction</b>			
110 000 Undifferentiated Curriculum	2,690,757.33	2,611,039.91	2,323,160.00
120 000 Regular Curriculum	564,094.11	604,265.42	606,516.00
130 000 Vocational Curriculum	0.00	0.00	0.00
140 000 Physical Curriculum	180,978.51	188,824.53	192,298.00
160 000 Co-Curricular Activities	52,542.13	71,248.83	42,797.00
170 000 Other Special Needs	117,705.33	120,795.98	123,152.00
<b>Subtotal Instruction</b>	<b>3,606,077.41</b>	<b>3,596,174.67</b>	<b>3,287,923.00</b>
<b>Support Sources</b>			
210 000 Pupil Services	110,784.45	136,985.33	157,683.00
220 000 Instructional Staff Services	196,049.28	201,493.01	232,152.00
230 000 General Administration	449,370.31	431,589.21	404,382.00
240 000 School Building Administration	0.00	0.00	0.00
250 000 Business Administration	780,524.15	970,557.35	866,953.00
260 000 Central Services	34,942.03	32,050.07	33,200.00
270 000 Insurance & Judgments	54,747.25	57,951.13	64,619.00
280 000 Debt Services	7,451.03	20,342.46	20,000.00
290 000 Other Support Services	149,515.33	140,648.50	205,930.00
<b>Subtotal Support Sources</b>	<b>1,783,383.83</b>	<b>1,991,617.06</b>	<b>1,984,919.00</b>
<b>Non-Program Transactions</b>			
410 000 Inter-fund Transfers	409,547.18	561,843.70	544,426.00
430 000 Instructional Service Payments	268,521.00	306,200.75	444,866.00
450 000 Post-Secondary Scholarship Expenditures	0.00	0.00	0.00
490 000 Other Non-Program Transactions	0.00	0.00	0.00
<b>Subtotal Non-Program Transactions</b>	<b>678,068.18</b>	<b>868,044.45</b>	<b>989,292.00</b>
<b>TOTAL EXPENDITURES &amp; OTHER FINANCING USES</b>	<b>6,067,529.42</b>	<b>6,455,836.18</b>	<b>6,262,134.00</b>

<b>SPECIAL PROJECT FUNDS (FUNDS 21, 23, 29)</b>			
900 000 Beginning Fund Balance	474.68	30,725.68	136,166.68
<b>900 000 Ending Fund Balance</b>	<b>30,725.68</b>	<b>136,166.68</b>	<b>28,576.68</b>
<b>REVENUES &amp; OTHER FINANCING SOURCES</b>	<b>96,964.52</b>	<b>169,319.40</b>	<b>13,718.00</b>
100 000 Instruction	66,713.52	63,878.40	121,308.00
200 000 Support Services	0.00	0.00	0.00
400 000 Non-Program Transactions	0.00	0.00	0.00
<b>TOTAL EXPENDITURES &amp; OTHER FINANCING USES</b>	<b>66,713.52</b>	<b>63,878.40</b>	<b>121,308.00</b>

<b>SPECIAL EDUCATION FUND (FUND 27)</b>			
900 000 Beginning Fund Balance	0.00	0.00	0.00
<b>900 000 Ending Fund Balance</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>REVENUES &amp; OTHER FINANCING SOURCES</b>			

**BUDGET ADOPTION 2023-24\* Lake Country School District**

	Audited 2021-22	Unaudited 2022-23	Budget 2023-24
100 Transfers-in	404,661.27	495,637.13	540,943.00
<b>Local Sources</b>			
240 Payments for Services	0.00	0.00	0.00
260 Non-Capital Sales	0.00	0.00	0.00
270 School Activity Income	0.00	0.00	0.00
290 Other Revenue, Local Sources	0.00	0.00	0.00
<b>Subtotal Local Sources</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>Other School Districts Within Wisconsin</b>			
310 Transit of Aids	8,636.93	0.00	6,000.00
340 Payments for Services	20,601.93	29,745.67	27,903.00
380 Medical Service Reimbursements	0.00	0.00	0.00
390 Other Inter-district, Within Wisconsin	0.00	0.00	0.00
<b>Subtotal Other School Districts within Wisconsin</b>	<b>29,238.86</b>	<b>29,745.67</b>	<b>33,903.00</b>
<b>Other School Districts Outside Wisconsin</b>			
440 Payments for Services	0.00	0.00	0.00
490 Other Inter-district, Outside Wisconsin	0.00	0.00	0.00
<b>Subtotal Other School Districts Outside Wisconsin</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>Intermediate Sources</b>			
510 Transit of Aids	0.00	0.00	0.00
530 Payments for Services from CCDEB	0.00	0.00	0.00
540 Payments for Services from CESA	0.00	0.00	0.00
580 Medical Services Reimbursement	0.00	0.00	0.00
590 Other Intermediate Sources	0.00	0.00	0.00
<b>Subtotal Intermediate Sources</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>State Sources</b>			
610 State Aid -- Categorical	128,611.00	135,018.13	135,000.00
620 State Aid -- General	38,602.00	33,707.00	48,500.00
630 DPI Special Project Grants	0.00	0.00	0.00
640 Payments for Services	0.00	0.00	0.00
650 Achievement Gap Reduction (AGR grant)	0.00	0.00	0.00
690 Other Revenue	0.00	0.00	0.00
<b>Subtotal State Sources</b>	<b>167,213.00</b>	<b>168,725.13</b>	<b>183,500.00</b>
<b>Federal Sources</b>			
710 Federal Aid - Categorical	0.00	0.00	0.00
730 DPI Special Project Grants	215,393.00	154,699.19	200,236.00
750 IASA Grants	0.00	0.00	0.00
760 JTPA	0.00	0.00	0.00
770 Other Federal Revenue Through Local Units	0.00	0.00	0.00
780 Other Federal Revenue Through State	7,567.63	3,597.02	5,000.00
790 Other Federal Revenue - Direct	0.00	0.00	0.00
<b>Subtotal Federal Sources</b>	<b>222,960.63</b>	<b>158,296.21</b>	<b>205,236.00</b>
<b>Other Financing Sources</b>		0.00	0.00
860 Compensation, Fixed Assets	0.00	0.00	0.00
870 Long-Term Obligations	0.00	0.00	0.00
<b>Subtotal Other Financing Sources</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>Other Revenues</b>			
960 Adjustments	0.00	0.00	0.00
970 Refund of Disbursement	0.00	0.00	0.00
990 Miscellaneous	0.00	0.00	0.00
<b>Subtotal Other Revenues</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>TOTAL REVENUES &amp; OTHER FINANCING SOURCES</b>	<b>824,073.76</b>	<b>852,404.14</b>	<b>963,582.00</b>
<b>EXPENDITURES &amp; OTHER FINANCING USES</b>			
<b>Instruction</b>			
110 000 Undifferentiated Curriculum	0.00	0.00	0.00
120 000 Regular Curriculum	0.00	0.00	0.00
130 000 Vocational Curriculum	0.00	0.00	0.00
140 000 Physical Curriculum	0.00	0.00	0.00

**BUDGET ADOPTION 2023-24\* Lake Country School District**

	Audited 2021-22	Unaudited 2022-23	Budget 2023-24
150 000 Special Education Curriculum	479,083.77	444,691.60	524,048.00
160 000 Co-Curricular Activities	0.00	0.00	0.00
170 000 Other Special Needs	0.00	0.00	0.00
<b>Subtotal Instruction</b>	<b>479,083.77</b>	<b>444,691.60</b>	<b>524,048.00</b>
<b>Support Sources</b>			
210 000 Pupil Services	165,136.80	197,064.36	206,649.00
220 000 Instructional Staff Services	18,648.00	0.00	27,533.00
230 000 General Administration	0.00	1,558.81	1,800.00
240 000 School Building Administration	0.00	0.00	0.00
250 000 Business Administration	38,329.97	15,767.11	20,000.00
260 000 Central Services	0.00	0.00	0.00
270 000 Insurance & Judgments	0.00	0.00	0.00
280 000 Debt Services	0.00	0.00	0.00
290 000 Other Support Services	0.00	0.00	0.00
<b>Subtotal Support Sources</b>	<b>222,114.77</b>	<b>214,390.28</b>	<b>255,982.00</b>
<b>Non-Program Transactions</b>			
410 000 Inter-fund Transfers	0.00	0.00	0.00
430 000 Instructional Service Payments	122,875.22	192,277.01	183,552.00
490 000 Other Non-Program Transactions	0.00	1,045.25	0.00
<b>Subtotal Non-Program Transactions</b>	<b>122,875.22</b>	<b>193,322.26</b>	<b>183,552.00</b>
<b>TOTAL EXPENDITURES &amp; OTHER FINANCING USES</b>	<b>824,073.76</b>	<b>852,404.14</b>	<b>963,582.00</b>

**DEBT SERVICE FUND (FUNDS 38, 39)**

900 000 Beginning Fund Balance	0.00	0.00	0.00
<b>900 000 ENDING FUND BALANCES</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>TOTAL REVENUES &amp; OTHER FINANCING SOURCES</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
281 000 Long-Term Capital Debt	0.00	0.00	0.00
282 000 Refinancing	0.00	0.00	0.00
283 000 Operational Debt	0.00	0.00	0.00
285 000 Post Employment Benefit Debt	0.00	0.00	0.00
289 000 Other Long-Term General Obligation Debt	0.00	0.00	0.00
400 000 Non-Program Transactions	0.00	0.00	0.00
<b>TOTAL EXPENDITURES &amp; OTHER FINANCING USES</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>842 000 INDEBTEDNESS, END OF YEAR</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>

**CAPITAL PROJECTS FUND (FUNDS 41, 46, 48, 49)**

900 000 Beginning Fund Balance	0.00	0.00	0.00
<b>900 000 Ending Fund Balance</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>TOTAL REVENUES &amp; OTHER FINANCING SOURCES</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
100 000 Instructional Services	0.00	0.00	0.00
200 000 Support Services	0.00	0.00	0.00
300 000 Community Services	0.00	0.00	0.00
400 000 Non-Program Transactions	0.00	0.00	0.00
<b>TOTAL EXPENDITURES &amp; OTHER FINANCING USES</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>

**FOOD SERVICE FUND (FUND 50)**

900 000 Beginning Fund Balance	58,416.20	137,233.53	160,925.08
<b>900 000 ENDING FUND BALANCE</b>	<b>137,233.53</b>	<b>160,925.08</b>	<b>142,183.08</b>
<b>TOTAL REVENUES &amp; OTHER FINANCING SOURCES</b>	<b>342,444.38</b>	<b>228,635.95</b>	<b>175,409.00</b>
200 000 Support Services	263,627.05	204,944.40	194,151.00
400 000 Non-Program Transactions	0.00	0.00	0.00
<b>TOTAL EXPENDITURES &amp; OTHER FINANCING USES</b>	<b>263,627.05</b>	<b>204,944.40</b>	<b>194,151.00</b>

**BUDGET ADOPTION 2023-24\* Lake Country School District**

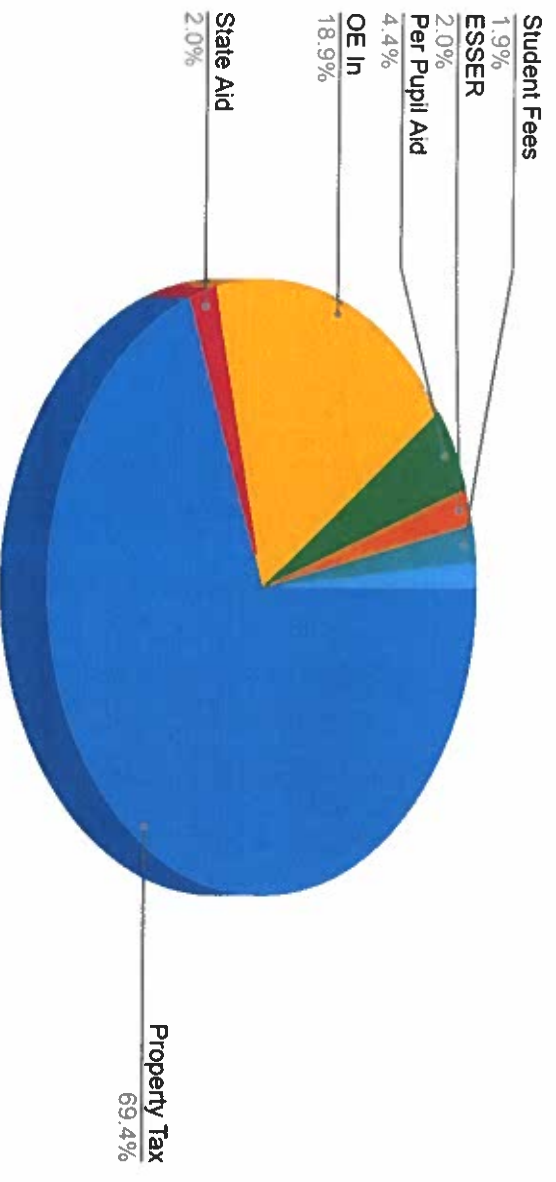
	Audited 2021-22	Unaudited 2022-23	Budget 2023-24
--	--------------------	----------------------	-------------------

<b>COMMUNITY SERVICE FUND (FUND 80)</b>			
900 000 Beginning Fund Balance	0.00	0.00	16,493.95
<b>900 000 ENDING FUND BALANCE</b>	<b>0.00</b>	<b>16,493.95</b>	<b>9,270.95</b>
<b>TOTAL REVENUES &amp; OTHER FINANCING SOURCES</b>	<b>56,081.00</b>	<b>56,081.00</b>	<b>56,081.00</b>
200 000 Support Services	56,081.00	39,587.05	63,304.00
300 000 Community Services	0.00	0.00	0.00
400 000 Non-Program Transactions	0.00	0.00	0.00
<b>TOTAL EXPENDITURES &amp; OTHER FINANCING USES</b>	<b>56,081.00</b>	<b>39,587.05</b>	<b>63,304.00</b>

<b>PACKAGE &amp; COOPERATIVE PROGRAM FUND (FUNDS 91, 93)</b>			
900 000 Beginning Fund Balance	0.00	0.00	0.00
<b>900 000 ENDING FUND BALANCE</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>TOTAL REVENUES &amp; OTHER FINANCING SOURCES</b>	<b>26,503.15</b>	<b>170,359.66</b>	<b>11,970.00</b>
100 000 Instruction	26,503.15	170,359.66	11,970.00
200 000 Support Services	0.00	0.00	0.00
400 000 Non-Program Transactions	0.00	0.00	0.00
<b>TOTAL EXPENDITURES &amp; OTHER FINANCING USES</b>	<b>26,503.15</b>	<b>170,359.66</b>	<b>11,970.00</b>

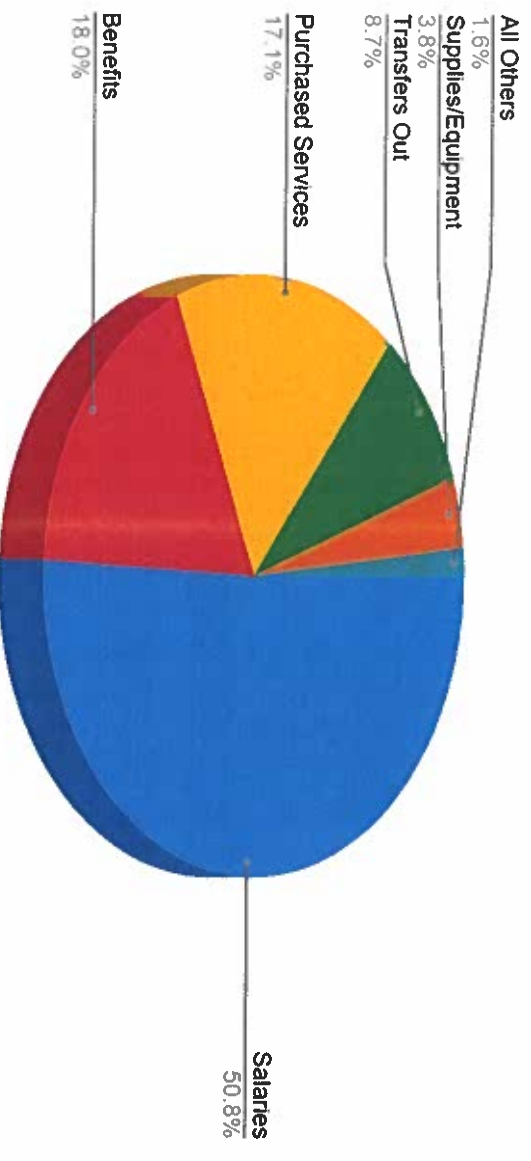
<b>Fund 10 Revenues</b>	
Property Tax	\$ 4,068,896
State Aid	\$ 117,325
OE In	\$ 1,109,042
Per Pupil Aid	\$ 260,442
ESSER	\$ 114,479
Student Fees	\$ 113,000
Other	\$ 81,525
<b>Total Fund 10 Rev</b>	<b>\$ 5,864,709</b>

**Fund 10 Revenue Sources**



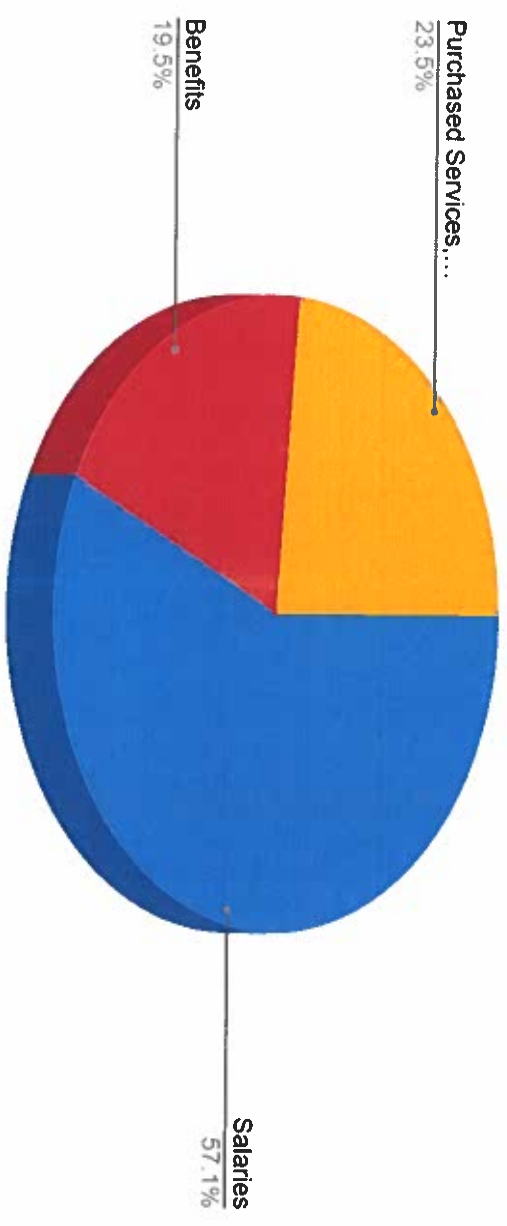
<b>Fund 10 Expenditures</b>	
Salaries	\$ 3,179,188
Benefits	\$ 1,128,467
Purchased Services	\$ 1,071,685
Transfers Out	\$ 544,426
Supplies/Equipment	\$ 240,017
All Others	\$ 98,351
<b>Total Fund 10 Exp</b>	<b>\$ 6,262,134</b>

**Fund 10 Expenditures**



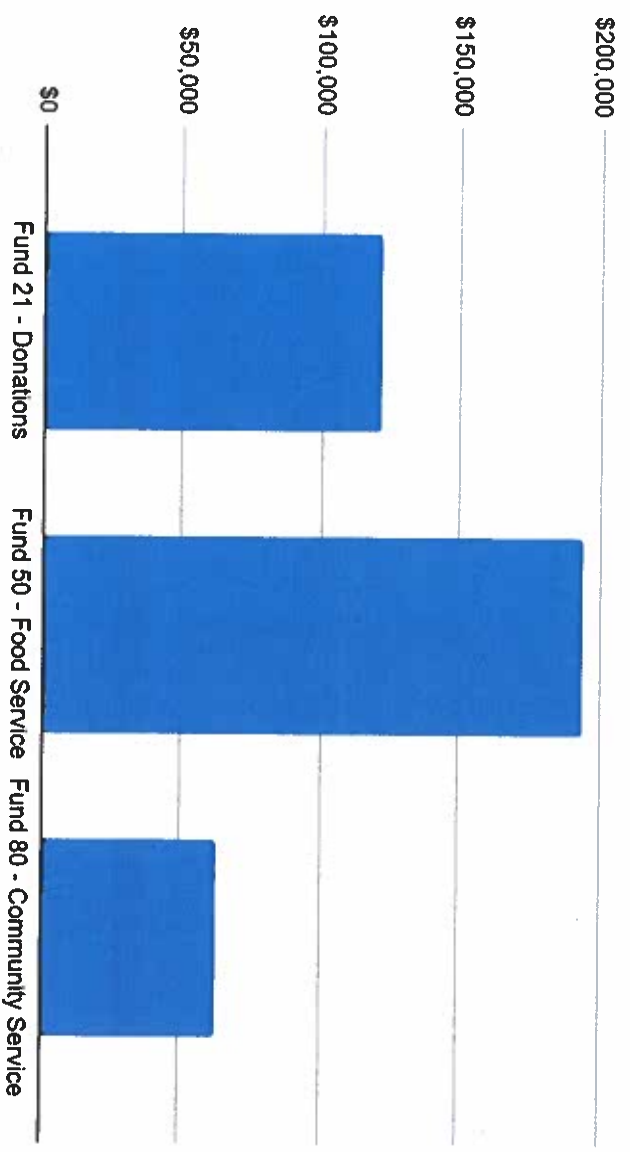
## Fund 27 Expenditures

Fund 27 Expenditures	
Salaries	\$ 550,012
Benefits	\$ 187,478
Purchased Services, Supplies/Equipment	\$ 226,092
<b>Total Fund 27 Exp</b>	<b>\$ 963,582</b>

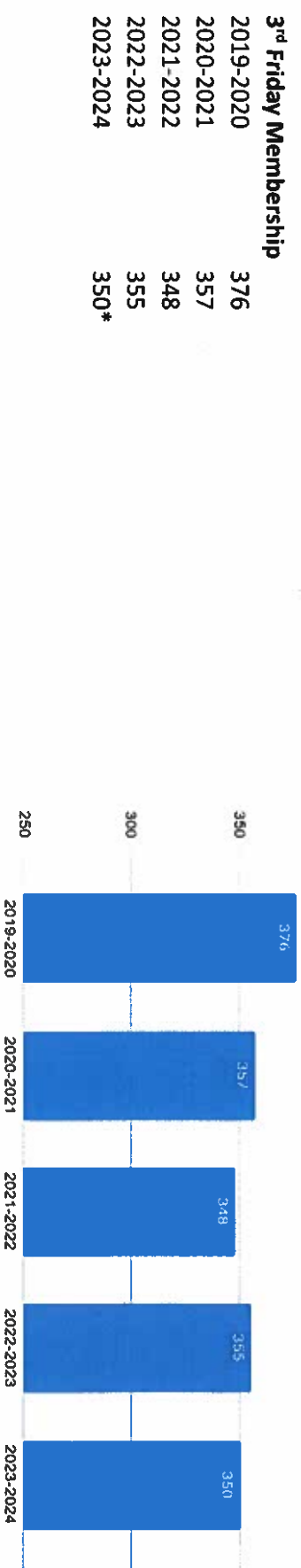


## Budgeted other Fund Expenditures

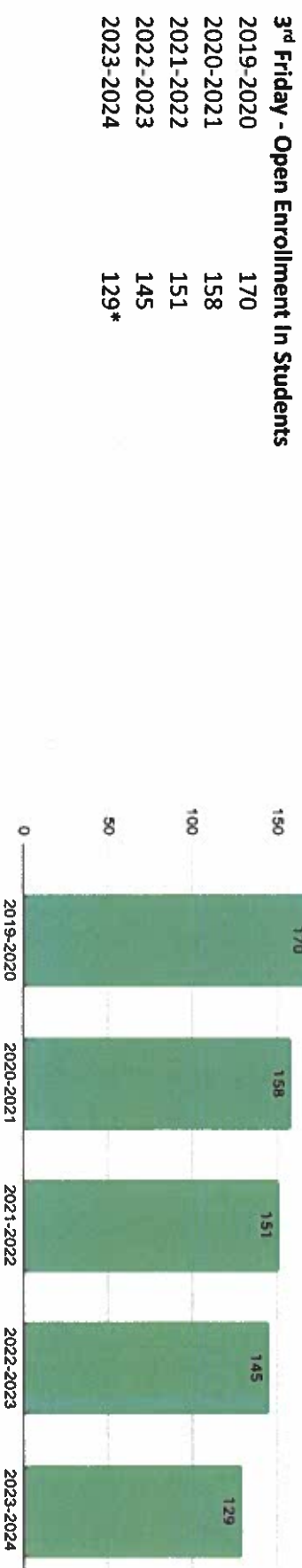
Budgeted Other Funds	
Fund 21 - Donations	\$ 121,308
Fund 50 - Food Service	\$ 194,151
Fund 80 - Community Service	\$ 63,304.0



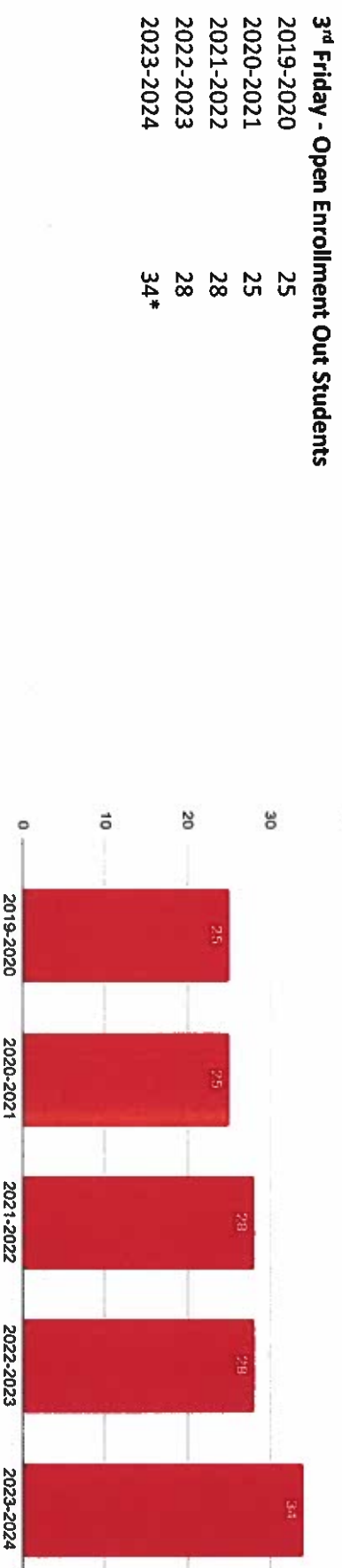
### 3rd Friday Membership Count



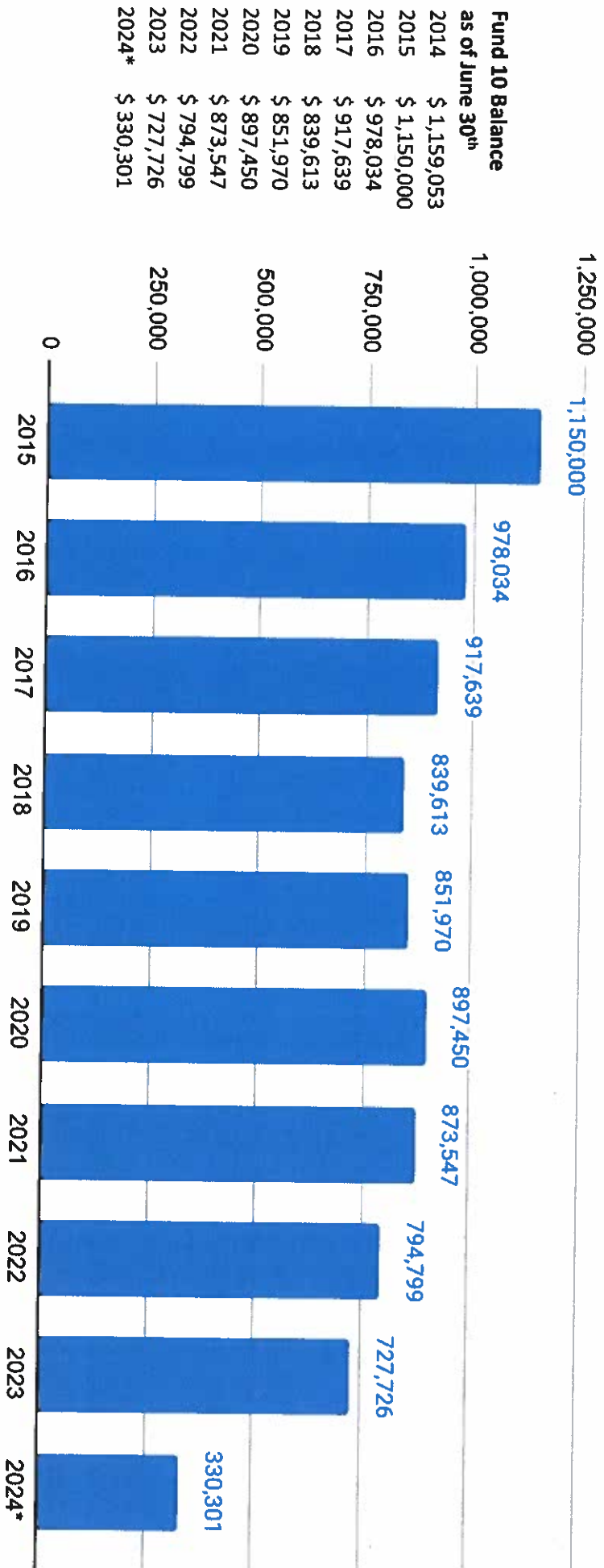
### 3rd Friday - Open Enrollment In Students



### 3rd Friday - Open Enrollment Out Students



## Fund 10 Balance Trend



Fund 10 Balance  
as of June 30<sup>th</sup>

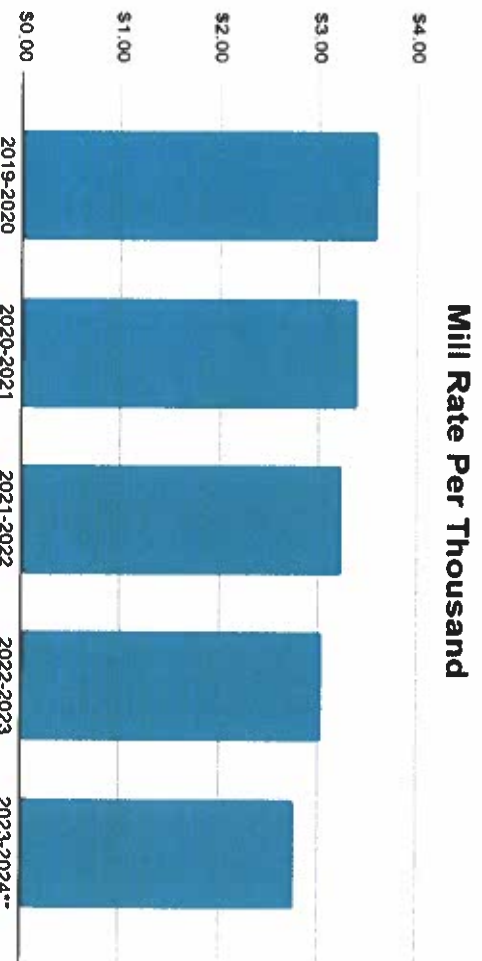
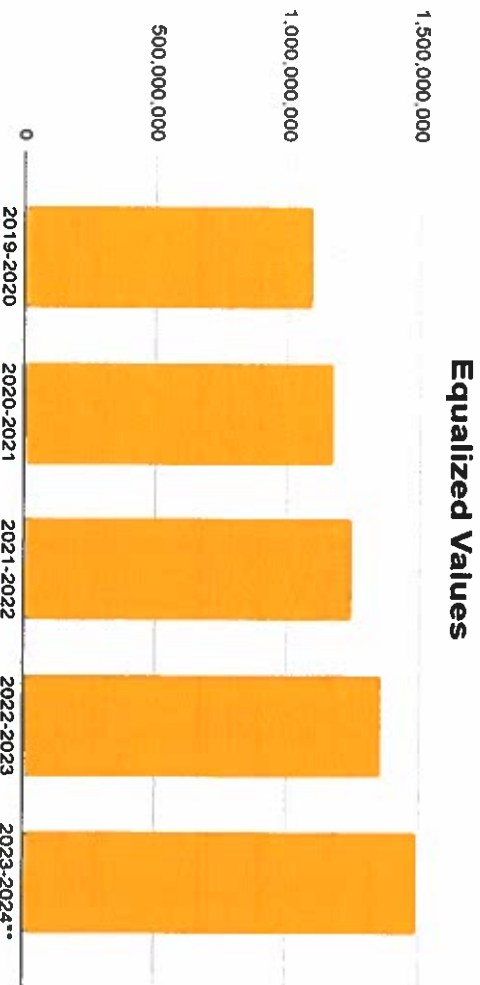
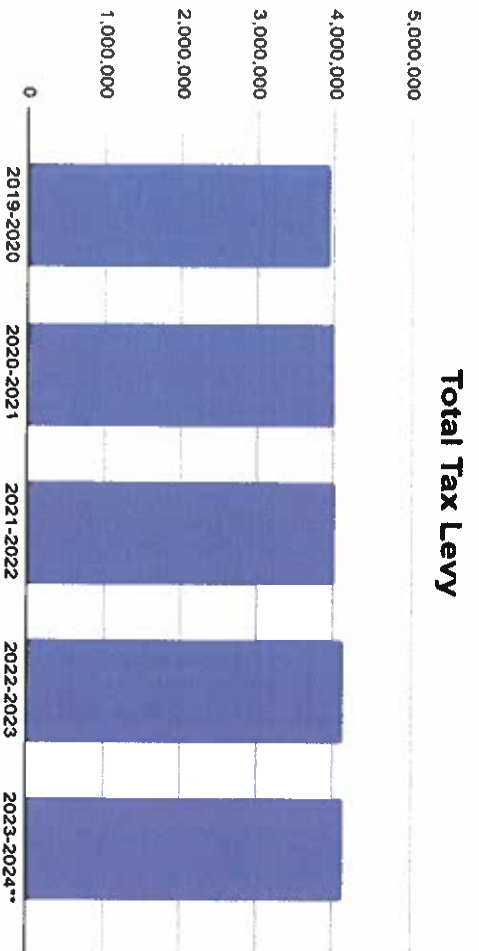
2014	\$ 1,159,053
2015	\$ 1,150,000
2016	\$ 978,034
2017	\$ 917,639
2018	\$ 839,613
2019	\$ 851,970
2020	\$ 897,450
2021	\$ 873,547
2022	\$ 794,799
2023	\$ 727,726
2024*	\$ 330,301



Year	Total Tax Levy
2019-2020	\$ 3,951,160
2020-2021	\$ 4,000,415
2021-2022	\$ 4,030,556
2022-2023	\$ 4,130,736
2023-2024**	\$ 4,124,977

Year	Equalized Values
2019-2020	\$ 1,096,227,328
2020-2021	\$ 1,175,261,677
2021-2022	\$ 1,244,420,821
2022-2023	\$ 1,359,689,779
2023-2024**	\$ 1,495,658,757

Year	Mill Rate Per Thousand
2019-2020	\$ 3.60
2020-2021	\$ 3.40
2021-2022	\$ 3.23
2022-2023	\$ 3.04
2023-2024**	\$ 2.76



DEPARTMENT OF PUBLIC INSTRUCTION 2023-24 REVENUE LIMIT WORKSHEET

DISTRICT: Lake County

DATA AS OF 8/15/2023

Line 1 Amount May Not Exceed (Line 11 - (Line 7B+Line 10)) of Final 22-23 Revenue Limit

22-23 General Aid Certification (22-23 Line 12A, Src 621)	23,283
22-23 HI Pov Aid (22-23 Line 12B, Src 628)	0
22-23 Computer Aid Received (22-23 Line 12C, Src 691)	69,522
22-23 Aid for Exempt Personal Property (22-23 Line 12D, Src 691)	28,012
22-23 Fnd 10 Levy Cert (22-23 Line 14A, Levy 10 Src 211)	4,074,655
22-23 Fnd 38 Levy Cert (22-23 Line 14B, Levy 38 Src 211)	0
22-23 Fnd 41 Levy Cert (22-23 Line 14C, Levy 41 Src 211)	0
22-23 Aid Penalty for Over Levy (22-23 FINAL Rev Lim, June 2023)	0
22-23 Total Levy for All Levied Non-Recurring Exemptions*	208,976
22-23-24 Base Revenue Built from 2022-23 Data (Line 1)	3,986,496

\*or the Non-Recurring Exemptions Levy Amount, enter actual amount for which district levied; (7B Hold Harmless, Non-Recurring elemtnda, Declining Enrollment, Energy Efficiency Exemption, Refunded/Rescinded Taxes, Prior Year Open Enrollment Pupils, eduction for Ineligible Fund 80 Expends, Other Adjustments, Private School Voucher Aid Deduction, Private School Special eeds Voucher Aid Deduction)

September & Summer FTE Membership Averages

ne 2: Base Avg:((20+ 4ss)+(21+ 4ss)+(22+ 4ss)) / 3 =

2020	2021	2022
Jmmer FTE: (40,40/40)	0	0
3pl FTE:	357	345
ew ICS - Independent	0.00	3.00
harter Schools FTE		
Total FTE	357	348

ne 6: Curr Avg:((20+ 4ss)+(21+ 4ss)+(22+ 4ss)) / 3 =

2021	2022	2023
Jmmer FTE: (40,40/40)	0	9
3pl FTE:	345	4
ew ICS - Independent	3.00	349
harter Schools FTE		5
Total FTE	348	350

The Line 6 "Current Average" shown above is used for Revenue Limits. The average used for Per Pupil Aid does not include "New ICS - Independent Charter Schools FTE." The PPA average appears below after data is entered for 2023:

351

ne 10B: Declining Enrollment Exemption =  
Average FTE Loss (Line 2 - Line 6, if > 0) X 1.00 =

All 2023 Property Values,  
223 TIF-Out Tax Apportionment Equalized Valuation

1,495,638,757

CELL COLOR KEY: Auto-Calc Auto-Calc DPJ Data District-Entered

Worksheet is available at: <http://dpi.wi.gov/fs/limits/worksheets/revenue>  
Calculation Revised: 8/15/2020, Rounding in Total FTE Buckets.

2023-2024 Revenue Limit Worksheet

1. 2023-24 Base Revenue (Funds 10, 38, 41)	(from left)	3,986,496
2. Base Sept Membership Avg (2020+4ss, 2021+4ss, 2022+4ss)/3	(from left)	35
3. 2023-24 Base Revenue Per Member (Ln 1 / Ln2)	(with cents)	11,293.1
4. 2023-24 Per Member Change (A-B)		325.2
2023-24 Low Revenue Ceiling per s. 121.905(1):		
A. Allowed Per-Member Change for 23-24	11,000.00	
B. Low Rev Incr ((Low Rev Ceiling-(3*4A)-4C) / NOT <0	325.00	
C. Value of the CCDEB (23-24 DPI Computed-CCDEB Dists only)	0.00	
5. 2023-24 Maximum Revenue / Member (Ln 3 + Ln 4)		11,618.1
6. Current Membership Avg (2021+ 4ss, 2022+ 4ss, 2023+ 4ss)/3	(from left)	35
7. 2023-24 Rev Limit, No Exemptions (Ln7A + Ln 7B)	(rounded)	4,101.22
A. Max Rev/Memb x Cur Memb Avg (Ln 5 x Ln 6)	4,101.221	
B. Hold Harmless Non-Recurring Exemption	0	
8. Total 2023-24 Recurring Exemptions (A+B+C+D+E)	(rounded)	0
A. Prior Year Carryover	0	
B. Transfer of Service	0	
C. Transfer of Territory/Other Reorg (if negative, include sign)	0	
D. Federal Impact Aid Loss (2021-22 to 2022-23)	0	
E. Recurring Referenda to Exceed (if 2023-24 is first year)	0	
9. 2023-24 Limit with Recurring Exemptions (Ln 7 + Ln 8)	0	4,101.22
10. Total 2023-24 Non-Recurring Exemptions (A+B+C+D+E+F+G+H+I)	0	85.06
A. Non-Recurring Referenda to Exceed 2023-24 Limit	0	
B. Declining Enrollment Exemption for 2023-24 (from left)	0	
C. Energy Efficiency Net Exemption for 2023-24 (see pg 4 for details)	0	
D. Adjustment for Refunded or Rescinded Taxes, 2023-24	0	
E. Prior Year Open Enrollment (uncounted pupils)	0	
F. Reduction for Ineligible Fund 80 Expenditures (enter as negative)	0	
G. Other Adjustments (Fund 39 Bal Transfer)	0	
H. WPCP and RPPC Private School Voucher Aid Deduction	49,000	
I. SNSP Private School Voucher Aid Deduction	36,000	
11. 2023-24 Revenue Limit With All Exemptions (Ln 9 + Ln 10)	4,196.22	
12. Total Aid to be Used in Computation (12A + 12B + 12C + 12D)	117.32	
A. 2023-24 JULY 1 ESTIMATE OF GENERAL AID	19,791	
B. State Aid to High Poverty Districts (\$0 per 2023 Act 19)	0	
C. State Aid for Exempt Computers (Source 691)	69,522	
D. State Aid for Exempt Personal Property (Source 691)	28,012	

13. Allowable Limited Revenue: (Line 11 - Line 12)

DISTRICTS MUST USE THE OCT 15 AID CERT WHEN SETTING THE DISTRICT LEVY.

4,068.89	
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14. Total Limited Revenue To Be Used (A+B+C)  
Entries Required Below: Enter amounts needed by purpose and fund:

4,068,896	(Proposed Fund 10)
0	(to Budget Rpt)
0	(to Budget Rpt)
56,081	(to Budget Rpt)
0	(to Budget Rpt)
0	(to Budget Rpt)
4,124.97	(to Budget Rpt)

Districts are responsible for the integrity of their revenue limit data & computation. Data appearing here reflects information submitted to DPI and is unaudited.