



All Learners Thriving, Contributing & Belonging

Dr. Steve Lutzke, Interim District
Administrator
608-882-3386
lutzkes@evansville.k12.wi.us

Paige Thao
Executive Assistant
608-882-3387
thaop@evansville.k12.wi.us

Dear Potential Candidate for School Board:

Thank you for your interest in serving as a school board member. This packet of material has been compiled to help get you started with your potential candidacy. If you decide to become a candidate, you will need to file the necessary forms at the District Office, located at 340 Fair Street, Evansville, WI 53536.

The forms prescribed by the Wisconsin Ethics Commission for the making of reports and statements under the campaign finance laws are available on the Commission's website (<http://ethics.wi.gov>).

The staff in the District Office will make copies of such forms (and certain manuals prescribed by the Ethic Commission) available to candidates and candidate committee treasurers at no charge upon request.

All forms must be filed, along with a Campaign Registration Statement and Declaration of Candidacy form, with the School District no later than 5:00 pm on Tuesday, January 2, 2024. Included in this packet is a "Guide for Candidates" from Wisconsin Association of School Boards and the Campaign Finance Overview from the Wisconsin Ethics Commission. Please review the information in this packet. Contact our office if you have any questions.

Thank you,

Paige Thao
Executive Assistant
Deputy Clerk of the School Board



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608-882-3386

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www.ecsdnet.org

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Serving on the Evansville Community School Board

A question often asked by prospective school board members is, "How much time does it take to serve on the School Board?" The best way to help you to determine the answer to this question is to talk to current and past Board members. They will be able to provide tremendous insight to this question along with helping you to understand the roles and responsibilities of this important and rewarding opportunity. Please know that current Board members and I will be happy to answer the questions that you may have as you seek to serve the Evansville Community School District and community.

To help understand the responsibilities and time commitment related to serving as a Board member, I have included the following information for your convenience:

Major Time Commitments and Responsibilities of a School Board Member

- 30-90 minutes to read bi-weekly Board packets. Board packets are prepared and ready for you on the Friday prior to a Wednesday Board meeting in most cases. I encourage new Board members to meet with me or an experienced Board member upon receiving the Board packets for the purpose of discussing the items in the packet.

- 2-4 hours for bi-weekly Board meetings. For the past several years, we have met on the 2nd and 4th Wednesdays of the month at 6pm.

- 15-30 minutes a week to review Board email. Each Board member is provided with a District email account and a device. Expect to receive emails from the District Administrator and parents. The content of emails will include: District related information; school bulletins and newsletters; and parent questions and concerns.

- I encourage each Board member to check the website regularly. There are many resources on the website that will help you to understand what is happening throughout the District and help you to navigate the many responsibilities of being a Board member.

Other Commitments and Opportunities

- In addition to the two regular Board meetings, there are typically several other special meetings throughout the school year. Special meetings are convened for Board retreats (1-2 a year), student expulsion hearings (0-3 a year), and the budget process.

Board members are invited to attend the opening of the school year all staff gathering in August, staff recognition in May or June, graduation in June, as well as other special events.

- Board members are encouraged to attend Back to School open houses, concerts, and athletic events.
- As a Board member you will have occasions where parents, staff and community members will want to discuss issues with you that pertain to the District. Expect to be approached while shopping or while attending school and community events and expect to be contacted by phone to discuss issues and concerns that are important to your constituents. It is understood that the members of the Board have authority only when acting as a Board legally in session. The Board shall not be bound in any way by any action or statement on the part of any individual Board member, except when such statement or action is in pursuance of specific instructions from the Board.

School Board Development and Resources

The Wisconsin Association of School Boards (WASB) is a beneficial resource for all Board members. You may access the WASB website at <http://www.wasb.org>.

You will receive a variety of publications from WASB on a monthly basis. WASB provides in-depth information on specific issues such as, policy development, legal updates, legislative updates, and public education news. WASB holds a training meeting for new board members in the spring and a regional meeting in the fall. WASB also sponsors workshops on legal issues, employment issues, special education or other topics of interest.

There is an annual WASB convention in Milwaukee during the third week of January. This event is often attended by one or more Board members along with me. The WASB Annual Convention allows us to learn about a variety of issues and topics that affect public schools.

Important aspects of serving as a Board member are to listen carefully, to communicate effectively and to know where to direct people to get questions answered and concerns addressed. In many cases Board members will direct questions and concerns to the District Administrator.

Serving as a school board member is an exciting and fulfilling opportunity. As a Board member you will help to determine the direction of the District and ensure that our students receive the best possible education we can provide in our schools.

I appreciate your interest and desire to serve our students, families, school district, and community.

Sincerely,

Dr. Steve Lutzke
Interim District Administrator

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

Declaration of Candidacy

(See instructions for preparation on back)

FOR OFFICE USE ONLY

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 _____
Official name of office - Include district, branch or seat number

representing _____
If partisan election, name of political party or statement of principle - five words or less (Candidates for nonpartisan office may leave blank.)

and I meet or will meet at the time I assume office 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.¹

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

House or fire no.	Street Name	Mailing Municipality and State	Zip code	Town of <input type="checkbox"/>	Village of <input type="checkbox"/>	City of <input type="checkbox"/>
				Municipality of Residence for Voting		

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 } _____ (Signature of candidate)
County of _____ } ss.
(County where oath administered)

Subscribed and sworn to before me this _____ day of _____, _____.

(Signature of person authorized to administer oaths)

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

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

If Notary Public: My commission expires _____ or is permanent.

The information on this form is required by Wis. Stat. § 8.21, Art. XIII, Sec. 3, Wis. Const., and must be filed with the filing officer in order to have a candidate's name placed on the ballot. Wis. Stats. §§ 8.05 (1)(j), 8.10 (5), 8.15 (4)(b), 8.20 (6), 120.06 (6)(b), 887.01.

¹ 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 any office in the State of Wisconsin must properly complete and file a **Declaration of Candidacy**. This form must be **ON FILE** with the proper filing officer 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 filing officer no later than the filing deadline **and** the signed original declaration is received by the filing officer 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 district, branch, or seat number** for which you are seeking election must be inserted on the second line. *For legislative offices insert the title and district number, for district attorneys insert the title and the county, for circuit court offices insert the title, county and branch number, and for municipal and school board offices insert the title and any district or seat number.*
- Type or print the political party affiliation or principle supported by you in five words or less on the third line. *Nonpartisan candidates may leave this line blank.*
- **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 filing officer. Wis. Stat. § 8.21. *Federal candidates are not required to provide this information, however an address for contact purposes is helpful.*
- 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 legal 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. For example, John “Jack” Jones or John (Jack) Jones are not acceptable, but John Jones, Jack Jones or John Jack Jones are acceptable.

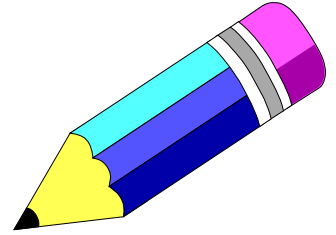
This form must be sworn to and signed in the presence of a notary public or other person authorized to administer oaths, such as a county or municipal clerk. Wis. Stat. §§ 8.21(2), 887.01(1).

Information to be provided by the person administering the oath:

- The county where the 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 notary seal is required and the date the notary's commission expires must be listed.

All candidates for offices using the nomination paper process must file this form (*and all school district candidates must file the EL-162sd*) with the appropriate filing officer 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). Candidates nominated for local office at a caucus must file this form with their municipal clerk within 5 days of receiving notice of nomination. Wis. Stat. § 8.05 (l)(j).

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.



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

A1. Committee Name (Required for all Candidates - must be included in disclaimer on all communications)				
A2. Email		A3. Phone		
A4. Mailing Address		A5. City	A6. State	A7. Zip
Depository Institution Information				
A8. Institution Name		A9. Street Address	A10. City	A11. State A12. Zip
Treasurer/Administrator Information				
A13. Name		A14. Email	A15. Phone	
A16. Mailing Address		A17. City	A18. State	A19. Zip
Other Officers (Optional)				
A20. Name	A21. Title	A22. Email	A23. Phone	
A24. Name	A25. Title	A26. Email	A27. Phone	
Filing Exemption <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>			A28. Exemption Affirmation <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

B1. Office Sought (include District/Branch)		B2. Political Party	B3. Election Date	
Candidate Information				
B4. Name		B5. Email	B6. Phone	
B7. Mailing Address		B8. City	B9. State	B10. Zip
Second Candidate Committee <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>			B11. Is this your only registered candidate committee in Wisconsin? Yes, this is my only candidate committee in Wisconsin. <input type="checkbox"/> No, this is my second candidate committee in Wisconsin.	
B12. Other Office Held or Sought (include District/Branch) 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.



GUIDE FOR CANDIDATES

2024 Spring Election Edition

(Published October 2023)



Supporting, Promoting and Advancing Public Education

The WASB Guide for Candidates is designed to provide general information and commentary as a service to WASB members based on state law and agency guidance as they existed at the time of publication. It should not be relied upon as legal advice. If legal advice is needed, the services of the school district's designated legal counsel should be obtained.

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WISCONSIN ASSOCIATION OF
SCHOOL BOARDS, INC.

122 W. Washington Avenue, Suite 400

Madison, WI 53703

Phone: 608-257-2622 or 877-705-4422 (toll-free)

WASB.org

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SCHOOL BOARD MEMBER ELECTION DATES

Clerks Publish the “Type A” Notice of Election (this notice identifies the school board seats that will be contested in the district at the Spring Election and includes other information about the election and candidacy process) —

The fourth Tuesday in November (November 28, 2023)

Deadline for Candidates to File to Appear on the Spring Election Ballot —

The standard deadline for declaring candidacy is 5:00 p.m. on the first Tuesday in January (January 2, 2024).

In order to be eligible to appear on the official ballot at the Spring Election, a candidate needs to file a declaration of candidacy and a campaign finance registration statement with the filing office identified in the district’s Notice of Election by no later than the applicable deadline. In some school districts, candidates must also file nomination papers with a sufficient number of signatures in order to qualify for the ballot. Nomination papers may not be circulated or filed prior to Dec. 1, 2023.

The appropriate forms can be obtained from the websites of the Wisconsin Elections Commission and the Wisconsin Ethics Commission, or from the school district’s main administrative office.

Spring Primary (if a primary election is needed) —

Third Tuesday in February (February 20, 2024)

Spring Election —

First Tuesday in April (April 2, 2024)

WASB New School Board Member Gatherings —

Held regionally around the state, usually in mid to late April. Please refer to the schedule on the WASB website (wasb.org) once it is available.

Persons Elected (or Re-Elected) to the School Board at the Spring Election Must Take and File the Official Oath of Office —

On or before the fourth Monday in April (no later than April 22, 2024)

Persons Elected (or Re-Elected) to the School Board Take Office —

Fourth Monday in April (April 22, 2024)

NOTICE: This pamphlet provides general information and is not intended as legal advice. The dates shown on this page reflect the standard dates established in state law as of the date of publication, but certain exceptions can sometimes apply. Please monitor the WASB website and other WASB communications for any changes, updates, or corrections to the information presented herein.



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



ADVOCATES FOR CHILDREN

School boards and school board members are uniquely positioned to be advocates for children.

A member of a school board is entrusted with one of the most important responsibilities that can be assigned to any citizen—that of helping to direct the education of the youth of his or her community.

In no other country is there local responsibility for and authority in education comparable to the American school board. This local responsibility and authority — local control—varies in degree from state to state, but it assures that public schools are flexible and responsive to community needs.

Wisconsin school board members are the elected representatives of their districts and set policy for the education of the district's children.

In Wisconsin, nearly 2,800 school board members are making decisions which affect more than 800,000 children enrolled in the public schools of the 421 districts in the state. These board members, as individuals, generally have no more power or authority than any other citizen in the district. It is when the individuals are meeting collectively as a board that they can legally make decisions affecting the district.

Board members in Wisconsin must go through an established procedure to gain election to the school board. Your district administrator or district clerk will tell you the specific requirements for your district. General requirements are included in this brochure.

A handwritten signature in black ink that reads "Daniel M. Rossmiller". The signature is written in a cursive style with a large, prominent "D" and "R".

Daniel M. Rossmiller, Executive Director
Wisconsin Association of School Boards

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.

EVALUATION: Evaluation is a continuous function that applies to policies, people and programs. Regular evaluation of all facets of school operations uncovers areas of success and opportunities in the school system and establishes a basis for future action.

BUDGET RESPONSIBILITY: Nothing conveys what is important to a school board more than the budget it adopts. The board uses public input to align resources with the school system's vision and goals. After that, the board supervises the execution of the budget, reviews school district accounts and business procedures and provides for an annual audit of the accounts as required by law.

COMMUNICATING WITH THE PUBLIC: There are times when school board members need to take the story of the district's success to the public, building support of public education. At other times, listening becomes the key communication strategy, understanding the values and concerns of the community, so that appropriate priorities can be established. Effective board members utilize both types of communication strategies to build support and establish relationships with their stakeholders.

ADVOCACY: The board serves as the key advocate in the community for students and their schools—encouraging progress, energizing systemic change and dealing with children as whole persons in a diversified society. In addition, effective school board members engage with state and federal policy makers to ensure that those policymakers understand the impact of legislative action taken at those levels of government.

More detailed information on the role, rights and duties of a school board member in Wisconsin is available from a variety of sources through the WASB.

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)

It should be noted that the Wisconsin Ethics Commission and its predecessors (the former Government Accountability Board and former State Ethics Board) have consistently interpreted the phrase “anything of substantial value” to mean anything of more than nominal, token, or inconsequential value in light of the totality of the circumstances. Although the Ethics Commission has not identified a specific figure, previous opinions suggest that anything worth more than several dollars may be suspect. Further, the Code of Ethics does not define “substantial financial interest” and fails to contain a safe harbor like the \$15,000 annual threshold found in s. 946.13. Thus, unlike s. 946.13, it is likely that financial interests in matters involving far less than \$15,000 will trigger the application of the Code. Finally, whereas s. 946.13 restricts an individual’s conduct in both the person’s private and public capacities, the Code of Ethics is primarily concerned with actions that a local public official takes in his or her public (i.e., official) capacity.

Incompatibility of Office: The common law doctrine of incompatibility of office is generally understood to prohibit a school board member from being simultaneously employed by the same school district where he or she is on the school board, and it may restrict school board members from serving the district in other capacities as well (e.g., in certain volunteer roles).

Before seeking a school board seat, a potential school board candidate who already holds some other public office should also determine if there may be a legal incompatibility between the currently held office and the office of school board member.

Q. What are the election procedures for the office of school board member?

In Wisconsin school districts, school board members are elected in April in connection with the spring election of various municipal and judicial officers. A regular term of office for a school board member is 3 years.

In common, union high and unified school districts, candidates who wish to appear on the election ballot must file a campaign finance registration statement, a declaration of candidacy, and, if required, nomination papers, with the school district clerk on or before 5 p.m. on the first Tuesday in January (or on the next day if Tuesday is a holiday). This deadline may be extended by 72 hours where an incumbent, without giving prior written notification of noncandidacy, fails to file as a candidate for re-election.

If required, nomination papers may not be circulated for signatures or filed before December 1. Staff in the office of the district administrator (superintendent) should be able to identify whether candidates in the district are required to solicit and file nomination signatures, as well as how many signatures are required.

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.

Q. Do school board members get paid for their service?

In common and union high school districts, the annual meeting of district electors may vote annual salaries for board members or an amount for each school board meeting that the board member actually attends.

In unified school districts, each school board member may be paid an annual salary or an amount fixed by the school board for each school board meeting the member actually attends. In the Milwaukee Public Schools, the members of the board of school directors are paid an annual salary in an amount set by the board.

School board members may refuse their salary by giving timely written notice. For more information, see s. 119.13 (Milwaukee), s. 120.45 (unified school districts), and s. 120.07 (common and union high school districts).

Q. Are school board members protected from civil suits?

The laws of Wisconsin provide some protection for school board members and other public officials who become involved in a legal action in their official capacity. The protection comes in the form of limited immunity from certain suits, and also in the form of a right to be indemnified by the school district in certain other civil suits. School districts generally maintain liability insurance policies that help the district meet its obligations to indemnify its officers.

However, school board members are not entirely immune from or indemnified for all possible personal liability. For example, there can be personal liability when a court or jury determines that a board member's conduct caused harm to another person and was also outside the scope of his or her duties as a board member, as might be the case with certain intentional and/or criminal acts. As another example, personal liability may arise from a board member's violation of the Wisconsin Open Meetings Law and from other failures to perform legally mandated duties. Some violations of the law by public officials constitute criminal offenses.

Q. How are vacancies on school boards filled?

Vacancies in school board offices in common, union high and unified school districts are generally filled by appointment by the remaining members within 60 days of the actual vacancy. Such appointees hold office until a successor is elected and takes office. Although the exact process to be followed varies by the timing of the vacancy, it is often the case that a partial (or "unexpired") term of either one or two years that is connected to a vacancy will appear on the ballot at the spring election in order to replace the board's appointee with a duly elected board member. A vacancy on the board of school directors in the Milwaukee Public Schools is filled by a special election.



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**122 W. Washington Ave., Suite 400
Madison, WI 53703**

**608-257-2622
(Toll Free) 877-705-4422**