

WASB
WISCONSIN ASSOCIATION OF SCHOOL BOARDS

GUIDE FOR CANDIDATES

2027 Spring Election Edition

(Published October 2026)



WISCONSIN ASSOCIATION OF SCHOOL BOARDS

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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Contents

Page

School Board Member Election Dates 2

A Message From the WASB President 3

Advocates for Children 4

Qualities of a School Board Member 5

What Does the School Board Do? 6

Questions and Answers 8

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 24, 2026)

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

- The standard deadline for declaring candidacy is 5 p.m. on the first Tuesday in January (January 5, 2027).

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, 2026.

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 16, 2027)

Spring Election —

- First Tuesday in April (April 6, 2027)

WASB New School Board Member Gatherings —

- Held regionally around the state, usually in mid to late April. Please refer to the schedule on 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 26, 2027)

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

- Fourth Monday in April (April 26, 2027)

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 WASB.org 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, 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.

Sandie Anderson

Sandie Anderson
WASB Board President | Wild Rose Board Member



Advocates for Children

School boards and school board members are uniquely positioned to be advocates for children and to make student learning and student achievement the center of their work.

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 and values.

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 affecting 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 only when these 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. This brochure describes general requirements. Your district administrator or school district clerk will tell you the specific requirements for your district.

Thank you for your interest in becoming a school board member!



Daniel M. Rossmiller
WASB Executive Director

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 a beneficial educational program.
- An open mind and readiness to learn.
- A willingness to attend seminars and workshops to help 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 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 district and to listen carefully to the criticisms offered by people with differing views.
- A willingness to invest the hours necessary to faithfully discharge board duties.
- The 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. This leadership role is performed as part of a team that includes the district administrator (also known as 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 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 some differences in the specific powers and responsibilities that are assigned to them. However, all school districts and school boards are alike 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 acts, 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 for growth, establishing 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 school board members need to build greater support for public education. This can be done by sharing the district's story, focusing on progress and success. At other times, listening becomes the key communication strategy so board members can better understand the values and concerns of the community and appropriately establish priorities. Effective board members use 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 supporting children as whole persons within a diversified society. In addition, effective
school board members engage with state and federal policymakers to ensure such policymakers understand the local implications of legislative decisions and their impact on schools and communities.

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

TIME COMMITMENT: A regular term of office for a school board member is 3 years. School boards are required to hold a regular board meeting at least once each month at a time and place determined by the school board. School boards may choose to have more than one regular board meeting each month as a matter of local policy or by any decision of the board. Aside from regular meetings, state law also establishes procedures for calling additional, special meetings of the board. (see s. 120.11 and 120.43 of the Wisconsin statutes.)

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.

Q. What are some potential conflicts of interest to consider before filing a declaration of candidacy?
There are at least three potential conflicts of interest 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 mentioned above. 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, as it deals with private interest in public contracts, 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 (exceptions may apply under s. 120.20)). Opinions of the Wisconsin Attorney General and the former State Ethics Board suggest that holding even a relatively minor employment position (e.g., substitute teaching) can give rise to incompatibility concerns.

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 this extension applies, the board clerk will give public notice of the 72-hour filing extension.)

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 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 often becomes 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 (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.

For additional information, refer to the Wisconsin Ethics Commission's manual titled "Campaign Finance Overview: Local Candidate Committees."

Q. What happens to election committees after the election?
Nonincumbent candidates that lost the election may wish to terminate their committee by filing the appropriate paperwork. Committees for candidates winning the election must remain active and cannot be terminated until the board term ends. Candidates that do not terminate their candidate committees must file periodic finance reports unless they qualify for the exemption from filing.

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 and/or indemnification by the school district in certain civil suits. School districts generally maintain liability insurance policies that help the district meet its obligations to indemnify its officers.

While school board members are generally protected from personal liability when acting in the scope of their official capacities, this protection is not absolute. For example, personal liability may arise if a board member's actions are determined to be outside the scope of his or her official capacity/authority and have caused harm to another—particularly in cases involving intentional misconduct or criminal behavior. Furthermore, 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. Violations of such laws can result in both civil and criminal penalties, including fines, imprisonment, and the invalidation of contracts.

Q. How are vacancies on school boards filled?
Vacancies in school board offices in common, union high school 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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Supporting, Promoting and Advocating for Public Education

SCHEDULE AT A GLANCE

The following is a convenient and concise list of the most critical dates and events. For more in-depth information and some additional dates, please review the full 2027 WASB School District Election Schedule booklet.

NOVEMBER 2026

DATE	EVENT
Nov. 24	• Deadline for Newspaper Publication of Type A Notice of Election
On or About Nov. 24	• Prepare Packet of Information for Potential Candidates

DECEMBER 2026

DATE	EVENT
Dec. 1	• Earliest Date for Circulation of Nomination Papers, If Required • (NOTE: Nomination Papers Are Not Required in Many School Districts)
Dec. 1 - Jan. 5	• Most Candidates Will File Campaign Registration Statements, Declarations of Candidacy, and Nomination Papers (If Required) During this Period • Filing Officer Promptly Makes All Filed Ballot Access Documents Available for Public Inspection
Dec. 28	• 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 Dec. 31	• Clerk Notifies Non-Exempt Committees of Deadline for Filing Campaign Finance January Continuing Report (for Period Ending December 31)

JANUARY 2027

DATE	EVENT
Jan. 5	• 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 and the Modified Deadlines for Challenges to Ballot Access Documents
Jan. 12	• 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
Jan. 15	• Deadline for Non-Exempt Committees to File January Continuing Report
Jan. 18	• Clerk Performs Duties with Respect to Campaign Finance Reports that Have Been Filed or that Are Delinquent
On or Before Jan. 25	• If a Primary Election Is Being Held, Provide Municipal Clerk with Ballots (Only If Separate Paper Ballots Are Utilized)

FEBRUARY 2027

DATE	EVENT
On or about Feb. 1	• If a Primary Election Is Being Held, Clerk Notifies Non-Exempt Committees of Deadline for Filing Preprimary Campaign Finance Report
Feb. 2 - 8	• Deadline for Non-Exempt Committees to File Preprimary Report (If Applicable)
Feb. 9	• Clerk Performs Duties with Respect to Campaign Finance Reports that Have Been Filed or that Are Delinquent
Feb. 12	• Write-in Candidate Registration Deadline for Primary Election (12:00 p.m.)
On or Before Feb. 15	• If Primary Election Is Being Held, Choose Board of Canvassers
Feb. 15	• If Primary Election Is Being Held, Publication of Notice of Primary Election (May Occur Earlier If the Newspaper Does Not Publish on Mondays)
Feb. 16	• **Spring Primary Election**

On or About Feb. 16	• If Primary Election Held, Issue Open Meetings Law Notice of Board of Canvassers Meeting(s)
Feb. 17	• If Primary Election Held, Receipt of Election Materials and Related Duties
On or About Feb. 17 - 23	• If Primary Election Held, Canvass of Primary Returns and Written • Determination of Primary Results
On or About Feb. 17 - 26	• If Primary Election Held, Recount Request May Be Filed by a Qualifying Aggrieved Party (If any)
On or About Feb. 18 - 26	• If Primary Election Held, Drawing of Lots for Ballot Order • If Primary Election Held, Certify Nominations and Ballot Order to County Clerk(s)

MARCH 2027

DATE	EVENT
On or Before Mar. 15	• Provide Municipal Clerk with Ballots (Only If Separate Paper Ballots Are Utilized)
On or About Mar. 22	• Clerk Notifies Non-Exempt Committees of Deadline for Filing Preelection Campaign Finance Report
Mar. 23 - 29	• Deadline for Non-Exempt Committees to File Preelection Report
Mar. 30	• Clerk Performs Duties with Respect to Campaign Finance Reports that Have Been Filed or that Are Delinquent

APRIL 2027

DATE	EVENT
Apr. 2	• Write-in Candidate Registration Deadline for Spring Election (12:00 p.m.)
On or Before Apr. 5	• Choose Board of Canvassers (Consider Appointing Canvassers Multiple Weeks in Advance)
Apr. 5	• Newspaper Publication of the Notice of Spring Election (May Occur Earlier if the Newspaper Does Not Publish on Mondays)
Apr. 6	• **Spring Election**
On or About Apr. 6	• Issue Open Meetings Law Notice of Board of Canvassers Meeting(s)
After Apr. 6	• Some Campaign Committees May File a Campaign Finance Termination Report
On or About Apr. 7	• Receipt of Election Materials and Other Related Duties
Apr. 7 - 13	• Canvass of Election Returns and Written Determination of Election Results
Apr. 7 - 16	• Recount Request May Be Filed by a Qualifying Aggrieved Party (If any)
Apr. 7 - 16	• Clerk Issues Certificate(s) of Election • Clerk Notifies Municipal and County Clerks of School District Officers
On or Before Apr. 26	• School Board Members Take and File Official Oath • Deadline for Newly Elected School Board Members to File Notice of Refusal of Salary that Takes Effect at the Start of the Term of Office
Apr. 26	• School Board Members Take Office
Apr. 26 - May 26	• Election of School Board Officials (i.e. Board Officers)

JUNE 2027

DATE	EVENT
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 2027

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

2027 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 for the candidate's name to be placed on the ballot at the **February 16, 2027 Spring Primary** and the **April 6, 2027 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 Registration Statement** (Form CF-1) to the filing officer prior to raising or spending any funds, and no later than **5:00 p.m. on Tuesday, January 5, 2027** 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 5, 2027. Wis. Stat. §§ 8.10(5), 8.30(2), Wis. Admin. Code EL § 6.04.

☐ **Complete and Submit a Declaration of Candidacy** (Form EL-162sd) to the filing officer no later than **5:00 p.m. on Tuesday, January 5, 2027** 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 5, 2027. 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 5, 2027.** Only original nomination papers (no photocopies, faxes, or emailed documents) will be accepted. Nomination papers may not be circulated before December 1, 2026. Wis. Stat. § 8.10(2), Wis. Admin. Code EL § 6.04(2).

THERE ARE GUIDES TO ASSIST CANDIDATES WITH NOMINATION PAPERS ON the WEC website.

The number of signatures required 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.[1]

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

				Town of ☐ **Village** of ☐ **City** of ☐	
House or fire no.	Street Name	Mailing Municipality and State	Zip code	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.)

_____
(Signature of candidate)

STATE OF WISCONSIN } ss.

County of _____
(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.
(date commission expires)

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 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

***CAUTION:** A personal telephone number that is identified as a confidential telephone phone number on page 3 of this form should **not** be entered on page 1 of this form. Do **not** enter any personal telephone numbers of the candidate, the candidate committee treasurer, and any other custodian of books and accounts on page 1 of this form.

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. Committee Email	**A3. Committee Phone** (Do not enter a confidential phone number)		
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. Treasurer Email**	**A15. Treasurer Phone** (*See Caution)	
A16. Mailing Address	**A17. City**	**A18. State**	**A19. Zip**

Other Officers (Optional)

A20. Name	**A21. Title**	**A22. Email**	**A23. Phone** (* See Caution above)
A24. Name	**A25. Title**	**A26. Email**	**A27. Phone** (* See Caution above)

Filing Exemption

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.

A28. Exemption Affirmation

☐ Yes, this registrant is eligible for exemption.

☐ 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. Candidate Email**	**B6. Candidate Phone** (* See Caution)	
B7. Mailing Address	**B8. City**	**B9. State**	**B10. Zip**

Second Candidate Committee

An individual who holds a state or local elective office may establish a second candidate committee to pursue another state or local office.

B11. Is this your only registered candidate committee in Wisconsin?

☒ Yes, this is my only candidate committee in Wisconsin.

☐ 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. Do not leave this section blank.

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 Registration Statement — Local Candidate Committee—Confidential Phone Contacts

State of Wisconsin

All information on pages 1 and 2 of this form is available to the public. Pursuant to 2023 Wisconsin Act 120, candidates, treasurers, and any other custodian of books and accounts (such as an assistant treasurer) are required to provide a personal telephone number. This page provides you the space to provide those required telephone numbers. Personal telephone numbers are confidential and are not subject to the right of inspection and copying under Wis. Stat. § 19.35(1). *See* Wis. Stat. § 11.0203(bd). However, a personal email address provided is subject to the right of inspection and copying under Wis. Stat. § 19.35(1) and may be disclosed.

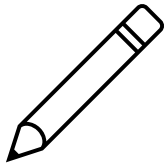
Failure to provide a valid email may result in failure to receive filing reminders and notifications from the filing officer. Failure to receive a form or notice from a filing officer does not exempt a committee from a reporting requirement under this chapter (Wis. Stat. §11.0103(b)). The candidate committee is required to report any change in information previously submitted in a registration statement within 10 days following the change. Wis. Stat. § 11.0203(3).

Candidate Information	
Name	**Personal Phone Number**

Treasurer Information	
Name	**Personal Phone Number**

Other Custodians' Information	
Name	**Personal Phone Number**
Name	**Personal Phone Number**
Name	**Personal Phone Number**

CAMPAIGN FINANCE CHECKLIST FOR 2027 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 15, 2027,** if registered before January 1, 2027. This report covers activity from July 1, 2026, or the date of registration (whichever is later), through December 31, 2026.
- ☐ Complete and submit a ***Pre-Primary Campaign Finance Report*** **(Form CF-2L)** to the filing officer no later than **February 8, 2027,** if a primary is held. This report covers activity from January 1, 2027, through February 1, 2027.
- ☐ Complete and submit a ***Pre-Election Campaign Finance Report*** **(Form CF-2L)** to the filing officer, no later than **March 29, 2027.** This report covers activity from February 2, 2027, through March 22, 2027, if a primary is held, **or** January 1, 2027, through March 22, 2027, 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, 2027.** This report covers activity from March 23, 2027, through June 30, 2027.

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

To obtain any of the necessary forms, please visit the Wisconsin Ethics Commission's website.

For further information on Campaign Finance reporting requirements, please contact the Wisconsin Ethics Commission via email at campaignfinance@wisconsin.gov or by phone at 608-266-8123.

Campaign Finance Reporting Schedule					
Report Name	**Filing Deadline**	**Schedule A: Local Candidate Committees**	**Schedule B: General Election Candidate Committees**	**Schedule C: Conduit Committees and Mid–Term Partisan Incumbents**	**Schedule D: Committees not Participating in Elections**
January Continuing 2026	01/15/2026	07/01/2025 – 12/31/2025	07/01/2025 – 12/31/2025	07/01/2025 – 12/31/2025	07/01/2025 – 12/31/2025
Spring Pre-Primary 2026	02/09/2026	01/01/2026 – 02/02/2026	N/A	N/A	N/A
Spring Pre-Election 2026	03/30/2026	02/03/2026 – 03/23/2026	N/A	N/A	N/A
July Continuing 2026	07/15/2026	03/24/2026 – 06/30/2026	01/01/2026 – 06/30/2026	01/01/2026 – 06/30/2026	01/01/2026 – 06/30/2026
Fall Pre-Primary 2026	08/03/2026	N/A	07/01/2026 – 07/27/2026	N/A	N/A
September Report 2026	09/30/2026	N/A	07/28/2026 – 09/23/2026	07/01/2026 – 09/23/2026	N/A
Fall Pre-Election 2026	10/26/2026	N/A	09/24/2026 – 10/19/2026	N/A	N/A
January Continuing 2027	01/15/2027	07/01/2026 – 12/31/2026	10/20/2026 – 12/31/2026	09/24/2026 – 12/31/2026	07/01/2026 – 12/31/2026
Spring Pre-Primary 2027	02/08/2027	01/01/2027 – 02/01/2027	N/A	N/A	N/A
Spring Pre-Election 2027	03/29/2027	02/02/2027 – 03/22/2027	N/A	N/A	N/A
July Continuing 2027	07/15/2027	03/23/2027 – 06/30/2027	01/01/2027 – 06/30/2027	01/01/2027 – 06/30/2027	01/01/2027 – 06/30/2027
January Continuing 2028	**01/18/2028**	**07/01/2027 – 12/31/2027**	07/01/2027 – 12/31/2027	07/01/2027 – 12/31/2027	07/01/2027 – 12/31/2027
Spring Pre-Primary 2028	**02/07/2028**	**01/01/2028 – 01/31/2028**	N/A	N/A	N/A
Spring Pre-Election 2028	**03/27/2028**	**02/01/2028 – 03/20/2028**	N/A	N/A	N/A
July Continuing 2028	**07/17/2028**	**03/21/2028 – 06/30/2028**	01/01/2028 – 06/30/2028	01/01/2028 – 06/30/2028	01/01/2028 – 06/30/2028
Fall Pre-Primary 2028	07/31/2028	N/A	07/01/2028 – 07/24/2028	N/A	N/A
September Report 2028	10/02/2028	N/A	07/25/2028 – 09/23/2028	07/01/2028 – 09/23/2028	N/A
Fall Pre-Election 2028	10/30/2028	N/A	09/24/2028 – 10/23/2028	N/A	N/A
January Continuing 2029	01/16/2029	07/01/2028 - 12/31/2028	10/24/2028 – 12/31/2028	10/24/2028 – 12/31/2028	07/01/2028 – 12/31/2028

CAMPAIGN FINANCE OVERVIEW

Local Candidate Committees

Wisconsin Ethics Commission

PO Box 7125

Madison, WI 53707-7125

Phone: (608) 266-8123

Email: campaignfinance@wi.gov

Websites: https://cfis.wi.gov

https://ethics.wi.gov

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.

Contents

Who is Required to Register? 2
Completing a Registration Statement 3
Guide for Filing the Campaign Finance Registration Statement (CF-1) 3
Candidates Seeking More Than One Office 5
Failure to File a Registration Statement 5
EXEMPTION FROM FILING CAMPAIGN FINANCE REPORTS 6
Eligibility 6
Financial Records During Exemption 6
Revoking Exemption 6
CONTRIBUTION LIMITS 7
Applicable Periods for Contribution Limits 7
Records Retention Requirement 8
Exceptions to Contribution Limits 8
CONTRIBUTIONS AND DISBURSEMENTS 9
Contributions 9
In-Kind Contributions 10
Reporting of Joint Advertisements 11
Contributions and Other Income from Businesses 11
Contributions Transferred through Conduits 12
Returned Contributions 12
Prohibited Contributions 13
Disbursements 13
Obligations and Loans 14
Cash Balances 15
CAMPAIGN FINANCE REPORTS 16
Types of Reports 16
Reporting Periods and Elections 16
How to Complete Campaign Finance Reports 17
No-Activity Report (“Postcard Report”) 17
ATTRIBUTION STATEMENTS (DISCLAIMERS) 18
Formats for Disclaimers 18
TERMINATION OF CAMPAIGN FINANCE REGISTRATION 20
Disposal of Residual Funds 20

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:

Office:	Filing Officer:
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
Alderperson, 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 30th immediately following the spring election. For candidates at the general election, the contribution limit period ends the December 31st 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 30th following the spring election. For an incumbent candidate whose office is elected at the general election, the contribution limit period ends December 31st 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 22nd 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). 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.

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Notice to Candidates for School Board

CAMPAIGN FINANCE REPORTS AND FORMS

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 at https://ethics.wi.gov/Pages/CampaignFinance/CampaignFinance.aspx

Copies of forms and certain manuals prescribed by the Ethics Commission will be made available upon request at no charge to candidate committees.

For inquiries contact Lynette Patoka at 715-345-5432.

Wisconsin Ethics Commission

For candidate committees, political party committees, legislative campaign committees, political action committees, independent expenditure committees, referendum committees, and recall committees

Acceptance and Reporting of Anonymous Contributions

This guideline is provided as an information resource only. For authoritative advice, contact the Wisconsin Ethics Commission.

ACCEPTANCE OF ANONYMOUS CONTRIBUTIONS

Wisconsin Statutes allow committees to accept anonymous contributions not exceeding $10.[1]

REPORTING OF ANONYMOUS CONTRIBUTIONS

Wisconsin Statutes require committees to make full reports of contributions on forms prescribed by the Commission.[2] Committees shall make a good faith effort to obtain all required information regardless of the amount of the contribution.[3] Required information includes the full name and street address of each person who has made a contribution to the committee.[4] Reports shall include an itemized statement of each contribution given anonymously.[5] Committees that accept anonymous contributions of $10 or less must itemize and report each anonymous contribution as a separate transaction.[6] Committees may *not* report an aggregate total of anonymous contributions of $10 or less.[7]

As Wisconsin Statutes prohibit anonymous contributions over $10 and require that anonymous contributions be itemized, the Commission recommends against the following practices:

- Placing or circulating contribution jars, baskets, buckets, etc., at properties, gatherings, or events.
- Conducting raffles, silent auctions, etc., where names and addresses are not collected.[8]
- Selling event tickets or merchandise, including, but not limited to yard signs, t-shirts, pins, stickers, where names and addresses are not collected.

If a committee wishes to engage in these practices, the Commission recommends that a responsible individual monitor the contribution jars or baskets, raffle or auction, or sales of tickets or merchandise

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[1] WIS. STAT. § 11.1108.
[2] WIS. STAT. §§ 11.0204(1)(a), 11.0304(1)(a), 11.0404(1)(a), 11.0504(1)(a), 11.0604(1)(a), 11.0804(1)(a), 11.0904(1)(a).
[3] WIS STAT. § 11.0103(1)(a).
[4] WIS. STAT. §§ 11.0204(1)(a)1., 11.0304(1)(a)1., 11.0404(1)(a)1., 11.0504(1)(a)1., 11.0604(1)(a)1., 11.0804(1)(a)1., 11.0904(1)(a)1.
[5] *Id.*
[6] *Id.*
[7] *See Id.*
[8] A raffle may have additional requirements as set forth by the Department of Administration's Division of Gaming. Committees should contact the Division for any questions on statutory requirements associated with raffles.

to make a good faith effort to obtain the names and addresses of contributors. A committee that engages in these practices must be able to accurately itemize each anonymous contribution received.

It is important to note that if a committee requests an individual to provide a name and address for a contribution of $10 or less, the individual may request to remain anonymous, and the committee may accept that contribution. The contribution shall be itemized and reported as anonymous.

EXCESS ANONYMOUS CONTRIBUTIONS

If a committee accepts an anonymous contribution in excess of $10, the committee shall donate the contribution to the common school fund or to a charitable organization.[9] This means that, if a committee receives an anonymous contribution of more than $10, the committee must donate the entire amount contributed. It is not sufficient to donate only the amount that the contribution exceeds $10. Additionally, the committee shall specify in its report whether the committee donated the contribution to the common school fund or to a charitable organization and shall include the name and mailing address of the donee.[10]

CONTRIBUTIONS THAT SHOULD NOT BE REPORTED AS ANONYMOUS

When a committee receives the following types of contributions they should not be reported as anonymous:

- Any contribution over $10
- Membership dues
- Periodic payroll deductions

ADDITIONAL INFORMATION AND RESOURCES

This is a guideline adopted by the Wisconsin Ethics Commission. Guidelines are prepared to provide general information to the public concerning the laws within the Commission's jurisdiction. Guidelines are not the law. Legal authority can be found in Wisconsin Statutes, the Wisconsin Administrative Code, case law, and the Commission's advisory opinions. If you have additional questions, please contact the Wisconsin Ethics Commission staff by email at CampaignFinance@wi.gov, or by phone at (608) 266-8123. Advice sought from the Ethics Commission is confidential. For additional information, please visit the Ethics Commission website: https://ethics.wi.gov.

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[9] WIS. STAT. § 11.1108.

[10] WIS. STAT. §§ 11.0204(1)(a)4., 11.0304(1)(a)4., 11.0404(1)(a)4., 11.0504(1)(a)4., 11.0604(1)(a)4., 11.0804(1)(a)3., 11.0904(1)(a)4., and 11.1108.