

**BALLOT ACCESS CHECKLIST
FOR 2021
SCHOOL DISTRICT CANDIDATES**



Each of the following forms must be completed and filed on time by a candidate for School District office in order for the candidate's name to be placed on the ballot at the **February 16, 2021 Spring Primary** and the **April 6, 2021 Spring Election**.

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

All School District Candidates must:

- ☐ **Complete and Submit a Campaign Registration Statement (Form CF-1)** to the filing officer prior to raising or spending any funds, and no later than **5 p.m. on Tuesday, January 5, 2021**, 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, 2021. Wis. Stat. §§ 8.10(5), 8.21, 8.30(4), 120.06(6)(b), Wis. Admin. Code EL § 6.04.
 - New Candidates
File a campaign registration statement before campaign funds are collected or spent or before submitting nomination papers. Wis. Stat. §§ 11.0202(1)(a), 11.0101(1),
 - Continuing Candidates
Amend your current registration, including the office sought and the new election and primary dates. Wis. Stat. §§ 11.0202 (1)(a), 11.0101(1).
- ☐ **Complete and Submit a Declaration of Candidacy (Form EL-162)** to the filing officer no later than **5 p.m. on Tuesday, January 5, 2021** 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, 2021. 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 p.m. on Tuesday, January 5, 2021**. Only original nomination papers (no photocopies, faxes, or emailed documents) will be accepted. Nomination papers may not be circulated before December 1, 2020. Wis. Stat. § 8.10(2), Wis. Admin. Code EL § 6.04(2).

The number of signatures required is as follows:

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



FORM INSTRUCTIONS

CAMPAIGN FINANCE REGISTRATION STATEMENT (CF-1)

Note: Use of this form is required by the Ethics Commission for registration of a political committee or conduit under Chapter 11 of Wisconsin Statute. Completion of this form is mandatory for committees that file on paper. It is not the Commission's intention to use any personally identifiable information from this form for any other purpose.

Item 1. Is this an amendment? Check the appropriate box. If "Yes" is checked, enter the committee ID number if you have one. If "No" is checked, proceed directly to Section A.

Section A: General Information. All candidates, committees, and conduits must complete section A.

Item A1: Committee/Conduit Name. All committees and conduits must have a name. It is not required that the name include the candidate or organization's name, but it is recommended, e.g., Friends of John Smith. A political party committee wishing to operate under the same name as a state political party committee must receive authorization from that state party (WIS. STAT. § 11.0101(26)(a)1).

Depository Institution Information. All committees and conduits must designate a depository institution. While it is recommended that all committees 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 and may intermingle personal and campaign funds (WIS. STAT. § 11.0201(2)(b)).

Treasurer/Administrator Information. Each committee must appoint a treasurer and each conduit must appoint an administrator. Any adult may serve as a treasurer or administrator. A candidate may serve as his or her own treasurer. If a candidate is serving as their own treasurer, please indicate so in this section.

Section B: Candidate Committees. Candidate committees must complete section B. No other committee type should complete section B.

Section C: Recall Committees. Recall committees must complete section C. No other committee type should complete section C.

Section D: PAC, IEC, and Conduits. Political action committees, independent expenditure committees, and conduits must complete section D. No other committee type should complete section B. All fields in section D refer to the sponsoring organization's contact information.

Section E: Political Party and Legislative Campaign Committees. Only political party committees and legislative campaign committees should complete section E.

Item E2. A political party or a legislative campaign committee may establish a segregated fund for purposes other than making contributions to a candidate committee or making disbursements for express advocacy (WIS. STAT. § 11.1104(6)). It is recommended that the committee maintain the segregated fund in a depository account separate from the primary account, but it is not required.

Items E3 - E7. If the segregated fund is maintained with the same depository institution as the primary account, write "Same as primary account." in E3.

Section F: Referendum Committees. Only referenda committees should complete section F.

Section G: Certification. All committees and conduits must complete section G.



CAMPAIGN FINANCE REGISTRATION STATEMENT

STATE OF WISCONSIN

Note: An amended registration statement must be filed within 10 days of any changes in information.

1. Is this an Amendment? ☐ No ☐ Yes If yes, please enter your committee number:

Committee Number

SECTION A: GENERAL INFORMATION

| | | | | | |
|--|---------------------|---|---|------------|----------|
| A1. Candidate Committee/Committee/Conduit Name | | A2. Registrant Type (Choose One) <input type="checkbox"/> Candidate <input type="checkbox"/> Referendum <input type="checkbox"/> Recall <input type="checkbox"/> Conduit <input type="checkbox"/> Political Action (PAC) <input type="checkbox"/> Independent Expenditure (IEC) <input type="checkbox"/> Political Party <input type="checkbox"/> Legislative Campaign Committee | | | |
| A3. Email | A4. Phone | | | | |
| A5. Mailing Address | | A6. City | A7. State | A8. Zip | |
| Depository Institution Information | | | | | |
| A9. Institution Name | A10. Street Address | | A11. City | A12. State | A13. Zip |
| Treasurer/Administrator Information | | | | | |
| A14. Name | | A15. Email | A16. Phone | | |
| A17. Mailing Address | | A18. City | A19. State | A20. Zip | |
| Other Officers (Optional) <i>Independent and local non-partisan candidates: Indicate by an asterisk (*) which officers are authorized to fill a vacancy in nomination due to death of candidate.</i> | | | | | |
| A21. Name | A22. Title | A23. Email | | A24. Phone | |
| A25. Name | A26. Title | A27. Email | | A28. Phone | |
| Filing Exemption <i>Registrants that will not accept contributions, make disbursements, or incur obligations in an aggregate amount of more than \$2,000 in a calendar year are eligible for exemption from filing campaign finance reports. Exempt status is effective only for the calendar year in which it is granted. Registrants wishing to remain on exempt status must renew each year. Candidates may not claim exemption in the year of their election before the day they appear on the ballot.</i> | | | A29. Exemption Affirmation <input type="checkbox"/> Yes, this registrant is eligible for exemption <input type="checkbox"/> No, this registrant is not eligible for exemption | | |

SECTION B: CANDIDATE COMMITTEES

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

SECTION C: RECALL COMMITTEES

| | | |
|--|--|---|
| C1. Name of Official Subject to Recall | C2. Office of Official Subject to Recall | C3. <input type="checkbox"/> Support <input type="checkbox"/> Oppose |
|--|--|---|



CAMPAIGN FINANCE REGISTRATION STATEMENT

STATE OF WISCONSIN

Note: An amended registration statement must be filed within 10 days of any changes in information.

SECTION D: PAC, IEC, AND CONDUITS

| | | | |
|-----------------------------|-----------|-----------|---------|
| D1. Sponsoring Organization | D2. Email | D3. Phone | |
| D4. Mailing Address | D5. City | D6. State | D7. Zip |

SECTION E: POLITICAL PARTY & LEGISLATIVE CAMPAIGN COMMITTEES

| | | | | |
|--|--------------------|--|-----------|---------|
| E1. Political Party (Name candidates appear under on a ballot) | | E2. Does the Committee have a Segregated Fund? <input type="checkbox"/> No <input type="checkbox"/> Yes | | |
| Segregated Fund Depository Institution Information (if applicable) | | | | |
| E3. Institution Name | E4. Street Address | E5. City | E6. State | E7. Zip |

SECTION F: REFERENDA COMMITTEES

| | |
|--|---|
| F1. Nature of Referendum (if applicable) | F2. <input type="checkbox"/> Support <input type="checkbox"/> Oppose |
|--|---|

SECTION G: CERTIFICATION

Accurate Information

I certify that I am an authorized representative of the registrant 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, as well as the requirement to register within 10 days of meeting the requirements to register under Chapter 11 of Wisconsin Statutes.

Records Retention

I further acknowledge the requirement to maintain the records of the registrant in an organized and legible manner for three years from the date of the most recent election in which this registrant participated.

Ongoing Compliance

This registrant shall continue to maintain its registration and comply with all applicable reporting requirements under Chapter 11 of Wisconsin Statutes.

Treasurer/Administrator

| | | |
|---------------------------|---------------|----------|
| G1. Printed Name | G2. Signature | G3. Date |
| Candidate (if applicable) | | |
| G4. Printed Name | G5. Signature | G6. Date |

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, or any combination of first name, middle name, and initials, 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).

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 <input type="checkbox"/> Village of <input type="checkbox"/> City of <input type="checkbox"/> |
| 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.)

STATE OF WISCONSIN

County of _____
(County where oath administered)

}

ss.

(Signature of candidate)

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

(Signature of person authorized to administer oaths)

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

If Notary Public: My commission expires _____ or ☐ is permanent.
(date commission expires)

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

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.