

**WAUNAKEE COMMUNITY SCHOOL DISTRICT
BOARD OF EDUCATION POLICY COMMITTEE MEETING**

Monday, November 18, 2024

7:30 AM

Waunakee Community School District
905 Bethel Circle
Waunakee, WI 53597

Members of the public may attend Board of Education meetings in-person, and will be asked to check in with District personnel when you arrive.

Public comments will be limited to 3 minutes. The Board will allow 30 Minutes for public comments.

Public comments may be sent to Rebecca McDonough at district_administrator@waunakee.k12.wi.us up to one hour before the start of the Board meeting. All comments will be reviewed by the Board members. Emailed comments will be reviewed by the board but not read out loud. Emailed comments sent during any part of the board meeting (Board Development, Closed session, Open session) will be forwarded to the board but may or may not be reviewed by the board until after the board adjourns. Comments must include the commentator's name, address, and must identify their connection to the District (if any) and any group they are representing in order to be considered by the Board.

If you would like to address the Board in-person during the public comments section of the meeting, you will be greeted in the lobby of the building, asked to check in with District personnel when you arrive so that you can be recognized and address the Board when your name is called.

A recording of the meeting will be posted on the District webpage within 24 hours of the meeting time.

AGENDA

I. CALL TO ORDER

II. ROLL CALL

III. APPROVE AGENDA

IV. PUBLIC COMMENTS

V. POLICIES FOR DISCUSSION, REVIEW, AND CONSIDERATION

A. Records Management and Retention Policy and Schedules

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The state of Wisconsin's General Records Schedule (GRS) has been updated and required a review by all public schools. Upon review, WCSD has determined to adopt the updated GRS, the GRS Crosswalk, and the Amendment for IT Surveillance to cover the WCSD records retention needs.

Attached please find the spreadsheet explaining the WASB recommendation for the policy. The policy and the schedules are attached. If approved, the schedules will be

attached to the policy website as an exhibit.

B. 800 Series Policies (810-862) 102

Attached please find the spreadsheet with the WASB & Administrative recommendations for policies 810 - 862.

1. 810 School - Community Relations Goals	105
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16. 862 Seating at Public Events	163

VI. **FUTURE MEETINGS**

VII. **ADJOURN**

“Any person who has a qualifying disability as defined by the Americans with Disabilities Act who requires assistance with access or materials should contact the Waunakee Community School District Office at 849-2000, 905 Bethel Circle Drive Waunakee, WI 53597, at least twenty-four hours prior to the commencement of the meeting so that necessary arrangements can be made to accommodate the request.”

Proposed Code #	Proposed Title	Current policy code	WASB recommendation	WASB Comment (if any)	Administration Recommendation:
823.1	Data Management	773	Recode and replace with PRG 823.1 sample policy 1	If your district adopts any of the Public Records Board General Records Retention Schedules, you can use PRG 823.1 sample Exhibit 1 to record adoption of those schedules.	Adopt WASB policy w/ edits.
	Records Retention Schedule	773E	Delete	Your Exhibit 773E is an obsolete records retention schedule that should be deleted and replaced with the Public Records Board's current general records schedules.	Adopt the GRS Dated 8/28/23 & WPSD GRS Crosswalk Dated: 10/2023 & Records Retention statement for IT Surveillance

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{This sample policy addresses (1) general responsibilities of district officers, employees, and agents regarding records management; (2) administrative responsibility for a district records management program; (3) district adoption of General Records Schedules and state-level approval of other records disposition authority; (4) records retention and disposition practices, including important exceptions to standard records retention periods; and (5) the conversion of district records into different formats.}

I. General Responsibilities of Officers, Officials, Employees, and Agents of the District

The District has a responsibility to maintain records in compliance with relevant state and federal laws. All officers, officials, employees, and other agents of the District are expected to adhere to applicable laws and District policies relating to records management. In carrying out those responsibilities, no such person may:

1. Unlawfully or without having authority to do so access District records, alter District records, or dispose of District records.
2. Unlawfully or inappropriately damage, remove, or conceal District records.
3. Facilitate any person's unlawful or unauthorized access to, or unlawful or unauthorized disclosure of, District records (including the content of such records).
4. Direct or permit another person to unlawfully or inappropriately access, modify, disclose, damage, remove, conceal, or dispose of District records.

II. Administrative Responsibility for a District Records Management Program

The insert applicable position(s)—e.g., "District Administrator and any School Board-designated legal custodian(s) of District records" have has primary administrative responsibility for defining and implementing a program of records management that complies with applicable law and District policies relating to records management. Those responsibilities include, but are not limited to, the following:

1. Overseeing the creation and implementation of any additional rules and operating procedures that may be needed to further govern records management in the District throughout the record life cycle, including protocols for storing District records, appropriately limiting access to records, protecting the personal privacy of record subjects, and maintaining the District's capacity to appropriately retrieve records and respond to requests for access to records.
2. Ensuring that the District utilizes appropriate information systems in connection with records maintained in an electronic format and defines appropriate rules and procedures related to the creation, modification, authority to access, and general management of electronic records. Editor's Note: This item relates to specific mandates defined under Chapter Adm 12 of the Wisconsin Administrative Code.
3. Establishing appropriate protocols (e.g., rules and training) for informing employees who are involved in collecting, maintaining, using, providing access to, sharing, or archiving

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personally-identifiable information of their duties and responsibilities relating to protecting the personal privacy of record subjects.

- Working with other staff and with the School Board President to bring issues and recommendations related to records management to the attention of the School Board, as deemed necessary or appropriate, on a timely basis.

5. ~~Insert if desired: "Maintaining an accurate summary of the current records disposition authority that the District has obtained from the Wisconsin Public Records Board (PRB). Such summary shall be maintained as an Exhibit to this policy and shall include at least an up-to-date listing of the General Records Schedules that the District has formally adopted (in whole or in part) as well as any additional, unexpired District specific records disposition authority that may have been approved by the PRB."~~ ~~Editor's Note: PRG 823.1 Sample Exhibit 1 has been created to implement and coordinate with this directive. However, a district could exclude this mandate from the policy and still use 823.1 Sample Exhibit 1.~~

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6. ~~Insert any other responsibilities the school board wishes to expressly document in this policy.~~

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III. Adoption of General Records Schedules and other State-Level Approval for District Records Disposition Authority

The following apply to the District's adoption and implementation of records disposition authority that is granted by the Wisconsin Public Records Board (PRB):

1. The administration shall obtain advance approval from the School Board prior to submitting any of the following to the PRB on behalf of the District: ~~Editor's Note: The need to make formal submissions to the PRB regarding records schedules and other district-specific disposition authority should arise infrequently. The WASB recommends advance school board approval of these actions. However, it might be sufficient for a policy to further delegate the relevant authority. As an example, if approved by district legal counsel, this paragraph might be replaced with the following: "Although obtaining advance approval via a Board motion is also acceptable, the District Administrator may also administratively authorize, with notice to the School Board, the submission of any of the following to the PRB on behalf of the District:"~~

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- A notice of adoption of a General Records Schedule (in whole or in part).
 - A notification of intent to opt-out of the adoption of a General Records Schedule (in whole or in part).
 - A request for the PRB's approval, renewal, or modification of any District-specific records disposition authority.
- To the extent permitted or required by the rules, policies, and procedures of the PRB and unless the District takes additional steps to formally opt-out of the District's previous adoption of a General Records Schedule, adoption of a General Records Schedule shall be understood to mean adoption of the applicable schedule (or applicable portion of the schedule) as such schedule may be amended from time to time by the Public Records Board.

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IV. Records Retention and Disposition

Subject to the exceptions identified below in this Section:

As to any District records that are covered by a District-adopted General Records Schedule or by any other District-specific disposition authority that has been approved by the PRB, the District will implement the schedule or other disposition authority, including (1) by retaining the records for at least the minimum period of time defined in the PRB-approved schedule or other PRB-approved records disposition authority, and (2) if required by law and not waived by the Society, by providing advance notice of the intended destruction of particular records to Wisconsin Historical Society.

Student records (referred to in state law as "pupil records" and in federal law as "education records") shall be maintained as required by applicable state and federal laws and as further detailed in any applicable District-adopted General Records Schedule, in any other applicable District-specific disposition authority that has been approved by the PRB, and in any District policy or procedure that further governs student records.

In the event that a District record covered by section 19.21(6) (i.e., nearly all District records other than student records) has no other applicable retention period established by, or pursuant to, a District-adopted General Records Schedule or any other District-specific retention and disposition authority that has been approved by the PRB, the District will retain the record as required under section 19.21(6) for not less than 7 years and follow any applicable mandatory notice procedures (e.g., notice to the State Historical Society) prior to destruction. In some cases, a specific state or federal law or a District policy or rule that has not necessarily been approved by the PRB may require or direct the retention of a particular type/series of District records for a minimum period that is longer than 7 years, up to and including permanent retention.

To the extent permitted by and consistent with applicable law, and separate from the authority addressed in Section III of this policy (above), the District may establish further local policies, rules, and procedures that govern records retention and records disposition. Such policies, rules, and procedures shall be approved by either the School Board or, to the extent not in conflict with any School Board decision, by insert appropriate position(s) – e.g., "the District Administrator or any Board-designated legal custodian(s) of District records". Insert if desired: "If a local rule or procedure approved under such administrative authority establishes or modifies a minimum or maximum retention period for any District records, the authorizing administrator shall ensure that the School Board receives notice of the administrative rule or procedure."

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The following are important exceptions to the District's standard records retention and destruction schedules, policies, and practices:

- **Litigation Holds, Including for Subpoenas:** When appropriate (e.g., due to imminent litigation, the receipt of a subpoena, the receipt of a formal notice of claim, pending litigation and related appeals, notice of an investigation by or formal proceedings in a state or federal agency, etc.), the District will initiate a litigation-related hold for the purpose of identifying, retaining, and preserving potentially relevant records (including electronically stored information) and other evidence. The District shall maintain records that become subject to

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a litigation hold for the longer of (1) the normal retention period for the record; or (2) the date on which the litigation hold is released.

- **Pending, Unresolved, and Litigated Requests for Access to District Records:** Upon the receipt of a request for access to District records under the Public Records Law or similar legal authority, the District's legal custodian of records shall take steps intended to prevent the destruction of potentially responsive records (including responsive records that the custodian may determine should not be released). The District shall maintain such potentially responsive records for the longer of (1) the normal retention period for the record; or (2) insert if desired: "at least 30 additional calendar days beyond" the expiration of any applicable special minimum retention period specified in section 19.35(5) of the state statutes. The statutory special retention periods apply to public records requests that have been denied and/or over which a court action has been commenced. This process also supports the District's compliance with a federal regulation governing students' personally identifiable education records that states that school districts shall not destroy any such education records if there is an outstanding request of a parent/guardian (or adult student) to inspect and review those records.
- **School District Audits:** Records necessary for any audit conducted at the direction of the Board or with notice from a state or federal authority shall be maintained until the later of (1) the date the records are no longer needed for audit purposes; or (2) the end of the normal retention period.

The insert appropriate position – e.g., "District Administrator and any School Board-designated legal custodian(s) of District records", acting in cooperation with and pursuant to the direction of District legal counsel where applicable, shall have primary responsibility for initiating and ending a litigation hold, the preservation of records due to an audit or a pending public records matter, or the special preservation of District records under other unique circumstances. Under any of these circumstances, the insert appropriate position – e.g., "District Administrator or legal custodian", as applicable, or such person's designee shall initiate prompt communication to the Board, relevant District staff, and any relevant third parties (e.g., contractors holding certain records) regarding the scope of the matter and the procedures that are to be followed. The School Board President, acting in consultation with District legal counsel, may also initiate a litigation hold or other special directives regarding the preservation of records.

No officer, official, employee, or agent of the District may, directly or indirectly, modify, inhibit appropriate access to, or dispose of District records that the person knows or has reasonable cause to believe may be subject to any of the exceptions to the District's standard records retention and destruction schedules, policies, and practices. Indirect conduct includes, for example, conduct that facilitates or causes the unlawful, unauthorized, or untimely modification or disposition of such records.

V. Converting District Records into Different Formats

From time to time, it may be necessary or desirable for the District to convert certain District records from one format to another. Typically, this will involve converting non-digital/electronic records into a digital/electronic format. It may also include, for example, converting records from one digital/electronic format to another digital/electronic format. Provided the process is

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carried out in a manner consistent with applicable laws and regulatory standards, the Board authorizes such records conversions.

Editor's Note: This paragraph relates to requirements established under sections 16.61(7) and 137.20 of the state statutes, as implemented by the Public Records Board's policies and procedures for transferring and changing the format of records. To the extent a records conversion program, process, or procedure includes the intent, after successful conversion, to dispose of any original input record **prior to the end of the minimum retention period** that is applicable to the record, then the following also apply:

1. The program, process, or procedure must be authorized in advance by **insert position title— e.g., "the District Administrator or any School Board designated legal custodian of District records";**
2. The authorizing administrator must **insert if desired: "give notice of the intended conversion of records to the School Board and";** ensure that the District complies with any mandatory procedures for giving notice of intent to convert records to the Public Records Board; and
3. The original input records shall not be disposed of until the Public Records Board has acknowledged any related District submission related to the conversion of the records and the District has verified that the records have been successfully converted and stored in the new format.

Legal References:

Wisconsin Statutes

Section 16.61(3)(e)	[authority of the Public Records Board to establish the minimum period of time for retention before destruction of any school district record]
Section 16.61(7)	[standards for reproduction and conversion of records; executing and recording statements of intent]
Section 16.612	[optical disc and electronic storage standards to be set by a state-level rules; see Chapter Adm 12]
Section 19.21	[custody and delivery of official property and records]
Section 19.21(6)	[school district records retention; destruction of obsolete records]
Section 19.33	[legal custodian(s) of records; designation, duties, and duty to identify to district employees]
Section 19.345	[time computations under the public records law]
Section 19.35(5)	[holding records related to a pending public records request]
Section 19.65	[rules of conduct and employee training]
Section 118.125	[student records, generally]
Section 118.125(3)	[retention rules for student records, including a requirement that any such local rules adopted by a school district must be published as a class 1 legal notice]
Section 120.13(28)	[school board power to designate legal custodian(s) of records]
Section 137.20	[retention of electronic records; originals]
Section 146.81 to 146.84	[patient health care records]
Chapters 801 thru 809	[Wisconsin civil procedure]

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[Section 889.08 to 889.10](#) [certification of copies of records and related statutes]
[Section 946.72](#) [criminal statute prohibiting tampering with public records]

Wisconsin Administrative Code

[Ch. Adm 12](#) [electronic records management; standards and requirements]

Federal Laws and Rules

[20 U.S.C. § 1232\(g\)](#) [Family Educational Rights and Privacy Act (FERPA); the federal student records law]

[34 C.F.R. part 99](#) [U.S. Department of Education FERPA regulations]

[34 C.F.R. §300.624](#) [retention and disposition of personally identifiable information in the education records of students with disabilities who receive services pursuant to the IDEA]

[F.R.C.P.](#) [Federal Rules of Civil Procedure]

Cross References:

WASB PRG 823.1 Sample Policy 1

[347, Pupil Records](#)

[823, Access to Public Records](#)

Adoption Date: 1/10/83

Revised: March 1994

August 10, 1998

June 2002

October 2005

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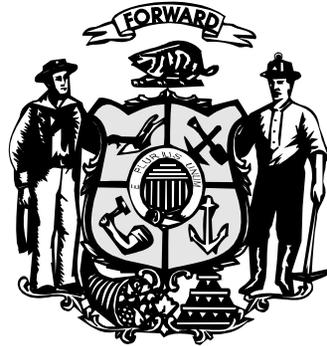
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General Records Schedule

Wisconsin Public School District and Related Records

Approved by the Public Records Board:

March 20, 2023



Revised: August 28, 2023

Expiration: March 20, 2033

I. Scope

This schedule governs the records retention obligations of state agencies pursuant to [Wis. Stat. § 16.61](#), and applies to “public records” as defined in [Wis. Stat. § 16.61\(2\)\(b\)](#). These “public records” are referred to as “records” in this schedule.

This schedule covers records created and used in the operation of Wisconsin public school districts. This general records schedule provides retention periods for records common to all school districts and denotes records of historical importance. The schedule is applicable to all records regardless of format or media.

This general schedule may *not* include records which are unique to the mission of a single government unit. Records that are unique to the mission of a specific government unit require a separate Records Disposition Authorization (RDA). The department or institution is responsible for creating a RDA that must be submitted to, and approved by, the [Public Records Board \(PRB\)](#).

See the [Introduction to General Records Schedules](#) for additional information about how to use this schedule. In particular please review the restrictions on conditions that might preclude the authorized destruction of documents in the normal course of business including open records requests, ongoing legal holds, or audits currently underway or known to be planned.

This schedule goes into effect upon final approval by the Public Records Board.

II. Records Format

Records covered in this schedule may be in paper, electronic, or other formats. Electronic format examples include those created or transmitted via e-mail, data contained in database systems, and tapes/cartridges. To safeguard the information contained in records maintained *exclusively* in electronic format, agencies must meet the standards and requirements for the management of electronic records outlined in [Wis. Admin. Code ch. Admin 12](#).

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III. Personally Identifiable Information

Wisconsin law requires authorities to specifically identify certain record series within a general records schedule that contain Personally Identifiable Information (PII). [Wisconsin Stat. § 19.62\(5\)](#) defines PII broadly as “information that can be associated with a particular individual through one or more identifiers or other information or circumstances.” Despite this broad definition, [Wis. Stat. § 16.61\(3\)\(u\)\(2\)](#), requires that record series within a schedule containing the following types of PII need not be identified as such: a) the results of certain computer matching programs; b) mailing lists; c) telephone or e-mail directories; d) record series pertaining exclusively to agency employees; and e) record series that contains PII incidental to the primary purpose for which the records series was created, and f) those relating to state agency procurement or budgeting. If in doubt as to whether a specific record series contains PII, check with your agency legal counsel.

IV. Confidentiality of Records

Most records are not confidential and are open to public disclosure, however, there are exceptions. This GRS will identify any record series that may contain information required by law to be kept confidential or specifically required to be protected from public access, identifying the state or federal statute, administrative rule, or other legal authority that so requires. If in doubt as to whether or not a specific record, or content in that record, is confidential, check with your agency legal counsel. A record series should be identified as confidential even if not all records in the series contain confidential information and not all parts of records covered by the series are confidential.

V. Superseded Record Series

“Superseded” means that a new record series or RDA number has been used to cover records that were previously identified differently. The last column in the following GRS table titled “Previous RDA Number (if applicable)” provides a cross walk between new and any superseded RDA numbers. When revising a GRS, an attempt is made to retain the previous RDA number, providing the underlying records remain the same.

VI. Closed Record Series

When revising a GRS it is common for some previously included record series to be closed. The “Closed Series” section lists series containing records that are no longer created, nor are they expected to be in the future. See the “Closed Series” section included in this document.

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VII. Revision History

See the “Revision History” section for a listing of changes to this GRS

VIII. Additional Schedules

School Districts should adopt [General Records Schedules](#) to augment the Public School Records GRS. These additional schedules have been approved by the PRB for state agency and local unit of government use. Information on adopting schedules can be found on the PRB [Counties and Municipalities Resource Webpage](#).

To adopt the Schedule:

- Submit the original and two copies of the Notification of General Schedules Adoption (PRB-002) form to:
State Archivist
Wisconsin Historical Society
816 State St.
Madison, WI 53706
- Complete one (PRB-002) form for each unique GRS.
- A signed copy will be returned once the form is approved by The Wisconsin Public Records Board (PRB).

RDA Number	Record Series Title	Series Description	PII (See III. above)	Confidential (See IV. above)	Minimum Retention and Disposition	Event Description	Examples/ Notes	Previous RDA Number (if applicable)
School Board and Administrative Records								
PUBSC100	School Board and School Board Committee Meeting Materials - Open Session	Official written minutes and agenda packets for meetings held in open session per Wisconsin Open Meetings Law, Wis. Stat. §§ 19.81 to 19.98.	Yes	No	Permanent	Retention Justification: These records contain historical information used to make current and future decisions.	This does not include Ad Hoc or Board Appointed citizen committees. This does not include audio or video recordings of board meetings.	1.1.1, 1.1.2
PUBSC120	School Board and School Board Committee Meeting Materials - Closed Session	Official written minutes and agenda packets for meetings held in closed session per exceptions to the Wisconsin Open Meetings Law, Wis. Stat. §§ 19.35(1)(a) and 19.85(1).	Yes	Yes Wis. Stat. §§ 19.35(1)(a) and 19.85(1)	Permanent	Retention Justification: These records contain historical information used to make current and future decisions.	School board minutes related to specific students, including expulsion hearing minutes, are to be governed under SCH400. This does not include audio or video recordings of board meetings.	13

RDA Number	Record Series Title	Series Description	PII (See III. above)	Confidential (See IV. above)	Minimum Retention and Disposition	Event Description	Examples/ Notes	Previous RDA Number (if applicable)
PUBSC140	Public Correspondence – Policy Related	Policy-related correspondence received by the school board or provided to the public regarding issues or concerns of general applicability to a school or school district.	May include PII	Yes Wis. Stat. § 118.125; FERPA	Event+10 years and destroy confidential	Event is end of school year.	This does not include any formal legal opinion. This does not include complaints made to the school board that involve specific students or situations not generally applicable to school district policy.	14
School District Historical Records								
PUBSC160	Referendum Results	Official results of a referendum presented to voters in an election.	No	No	Permanent	Retention Justification: These records contain historical information used to make current and future decisions.		1.1.12

RDA Number	Record Series Title	Series Description	PII (See III. above)	Confidential (See IV. above)	Minimum Retention and Disposition	Event Description	Examples/ Notes	Previous RDA Number (if applicable)
PUBSC180	School District Boundary Acknowledgements	Acknowledgements of organization orders and descriptions of boundaries and boundary changes provided by the Dept. of Public Instruction.	No	No	Permanent	Retention Justification: These records contain historical information used to make current and future decisions.		1.2.1
PUBSC200	Historical Materials and Artifacts	Records documenting significant events or milestones of individual schools and school districts. Records may include but are not limited to award lists, commencement programs, honor roll lists, student newspapers, and yearbooks/annuals.	May include PII	May include confidential information per Wis. Stat. § 118.125; FERPA	Permanent	Retention Justification: These records contain information with historic value.	These events are not documented in other records such as board minutes or student transcripts.	6.1.1, 6.1.2 15
Transportation Records								
PUBSC220	Parent or Other School District Transportation Contracts	Individually negotiated contracts for transporting students outside of standard district provided transportation.	Yes	Yes Wis. Stat. § 118.125; FERPA	Event+1 year and destroy confidential	Event is date of the end of the school year.		1.3.1

RDA Number	Record Series Title	Series Description	PII (See III. above)	Confidential (See IV. above)	Minimum Retention and Disposition	Event Description	Examples/ Notes	Previous RDA Number (if applicable)
PUBSC240	Transportation Aid Records	Records related to board approved bus routes that determine transportation aid school districts receive from the Dept. of Public Instruction. Records may include but are not limited to main bus route listing including all stops made and the students being picked up at each stop.	Yes	Yes Wis. Stat. § 118.125; FERPA	Event+4 years and destroy confidential	Event is date of the end of the school year.		1.3.6
Reporting Records								
PUBSC260	Reporting to the Department of Public Instruction	Records related to fulfilling school district reporting requirements set forth by the Department of Public Instruction per Wis. Stat. § Ch. 118 where not covered by a more specific records series. Records may include but are not limited to reports, supporting documentation, confirmation of submission, correspondence, inquiries, revisions, and corrections.	May include PII	May include confidential information per Wis. Stat. § 118.125; FERPA	Event+5 years and destroy confidential	Event is date report is certified by DPI.		1.3.8, 1.4.1, 1.4.2, 1.4.3, 1.4.4, 1.5.5, 1.5.9, 1.5.15, 1.5.16, 2.2.1, 2.2.2, 2.2.3, 2.2.4, 2.2.5, 2.2.6, 2.2.7, 2.2.8, 2.2.10, 2.2.11, 2.2.22, 2.2.24, 2.2.39, 2.2.41, 4.1.2, 4.1.8, 4.1.9, 4.1.10, 4.1.11, 4.1.12, 4.1.13, 5.1.3, 5.2.12, 5.2.13, 5.2.14, 5.2.15, 5.2.16, 5.2.18, 5.2.20

RDA Number	Record Series Title	Series Description	PII (See III. above)	Confidential (See IV. above)	Minimum Retention and Disposition	Event Description	Examples/ Notes	Previous RDA Number (if applicable)
PUBSC280	Reporting to Enforcement Agencies	Reports on child abuse or neglect, communicable disease, dog bites, drug offenses, missing children, or sexually transmitted disease submitted to the Wisconsin Department of Health or local law enforcement and animal control agencies.	Yes	Yes Wis. Stat. § 118.125; FERPA	Event+5 years and destroy confidential	Event is date report is submitted.		4.3.4
Management of Student Records								
PUBSC300	Record of disclosure of pupil record	<p>Listing of each time a record was disclosed with reason, date, and to whom. FERPA Records of Access to Information Record of each request to access to and each disclosure of personally identifiable information from the educational records of a student.</p> <p>Records may include but are not limited to documentation of requests from and disclosure to the parent or eligible student, to an official of the district for what the district has determined are legitimate educational interests, to a party with written consent from the parent or eligible student, or to a party seeking directory data. Documentation of requests from and disclosures to any party not referenced above.</p>	Yes	Yes 34 C.F.R. 99.32, 34 C.F.R. 300.614	Event+0 years and destroy confidential	Event is date underlying disclosed public record is no longer retained.		4.3.8
PUBSC320	Protest of Record Statements	Statements by parents or eligible students commenting on contested information in a student record or stating why they disagree with a district's decision not to amend a record, or both.	Yes	Yes 34 C.F.R. 99.21	Event+0 years and destroy confidential	Event is date underlying contested public record is no longer retained.		4.4.0

RDA Number	Record Series Title	Series Description	PII (See III. above)	Confidential (See IV. above)	Minimum Retention and Disposition	Event Description	Examples/ Notes	Previous RDA Number (if applicable)
Student Records								
PUBSC340	Full-time Open Enrollment Program Records	Open enrollment applications, nonresident and resident district notice of approval or denial, and notice of assignment and intent to attend. Retention is outlined in PI 36.08 (4)	Yes	Yes Wis. Stat. § 118.125	Event+3 years and destroy confidential	Event is date student application is rejected, the student declines enrollment, or the student is no longer enrolled in the nonresident district, whichever is later.		4.1.4, 5.2.1, 5.2.2, 5.2.3, 5.2.4, 5.2.8
PUBSC380	Custody Documents	Records documenting legal custody of a student.	Yes	Yes Wis. Stat. § 118.125(1)(a)	Event+1 year and destroy confidential	Event is date student graduates or withdraws from district or date superseded by a subsequent order.		4.4.1

RDA Number	Record Series Title	Series Description	PII (See III. above)	Confidential (See IV. above)	Minimum Retention and Disposition	Event Description	Examples/ Notes	Previous RDA Number (if applicable)
PUBSC400	Behavioral Records	<p>Per Wis. Stat. § 118.125(1)(a) behavioral records include all pupil records that are not identified by a more specific RDA, including but not limited to, psychological tests, personality evaluations, records of conversations, any written statement relating specifically to an individual pupil's behavior, tests relating specifically to achievement or measurement of ability, law enforcement records, and the pupil's physical health records.</p> <p>Records may include but are not limited to:</p> <ul style="list-style-type: none"> -Enrollment and registration forms -Records of transfers of pupil records -Physical Health Records <ul style="list-style-type: none"> • Basic health information • Emergency medical card • Log of first aid and medicine administered • Accident reports • Athletic permit card • Routine screening test results such as hearing, vision, or scoliosis • Records concerning ability to participate in an education program • Immunization exclusion verification -Disciplinary records <ul style="list-style-type: none"> • Disciplinary file, expulsion and suspension reports • Assault against staff reports <p>-504 records</p>	Yes	Yes. Wis. Stat. § 118.125; FERPA	Event+1 year and destroy confidential	Event is date of creation.	<p>Does not include immunization records or any lead screening records required under s. 254.162.</p> <p>Per Wis. Stat. § 118.125(3), no behavioral record may be maintained for more than one year after the pupil ceases to be enrolled in the school, unless the pupil specifies in writing that his or her behavioral records may be maintained for a longer period.</p>	<p>1.3.3, 1.3.7, 4.1.1, 4.1.3, 4.1.6, 4.2.2, 4.3.2, 4.3.3, 4.4.3, 4.4.4, 4.4.6, 4.4.7, 5.1.4</p> <p style="text-align: right;">19</p>

RDA Number	Record Series Title	Series Description	PII (See III. above)	Confidential (See IV. above)	Minimum Retention and Disposition	Event Description	Examples/ Notes	Previous RDA Number (if applicable)
PUBSC410	Student Expulsion Order	An order expelling a pupil issued under Wis. Stat. §§ 119.25 or 120.13(1).	Yes	Yes Wis. Stat. § 118.125; FERPA	Event+0 and destroy confidential	Event is date the order is no longer in effect.		4.4.5
PUBSC420	Progress Records	Per Wis. Stat. § 118.125(1)(c) progress records may include but are not limited to pupil's grades, a statement of the courses the pupil has taken, the pupil's attendance record, the pupil's immunization records, any lead screening records, records of the pupil's school extracurricular activities, teacher grade book, and athletic records.	Yes	Yes Wis. Stat. § 118.125(2)	Event+5 years and destroy confidential	Event is date student graduates or withdraws from district.		4.1.5, 4.1.14, 4.1.15, 4.2.1, 4.2.1.1, 4.2.1.2, 4.2.1.3, 4.2.1.4, 4.2.1.5, 4.2.1.6
PUBSC440	Individuals with Disabilities Education Act (IDEA) Records	Records pertaining to compliance with the Individuals with Disabilities Education Act. Records may include but are not limited to individualized education programs (IEPs), progress reports, test reports, assessments and evaluations, functional behavioral assessments (FBAs), behavioral intervention plans (BIPs), manifestation determinations.	Yes	Yes Wis. Stat. § 118.125; FERPA; IDEA	Event+1 year and destroy confidential	Event is date student graduates or withdraws from district.	See note below.	4.5.0, 4.5.1, 4.5.2 20

NOTE for SCH440:

Under federal law, recipients of federal funds must maintain certain records for financial or program audit purposes. These records include a child's IEP Team evaluation reports, IEPs and placement notices. The records must be kept for the current fiscal year plus four more years.

Under the IDEA, a school district must inform the parents of a child with a disability when personally identifiable information is no longer needed to provide educational services to the child. The notice would normally be given at the time the child graduates or otherwise ceases to be enrolled in the school district. The purpose of the notice is to alert parents that certain pupil records may be needed for proof of eligibility for benefits or other purposes. The personally identifiable information that is no longer needed must be redacted or otherwise removed at the request of the parent. Otherwise, as noted above, under state law the information may be maintained for only one year after the child graduates or otherwise ceases to be enrolled, unless the parent or adult pupil specifies in writing that the records may be maintained for a longer period of time. [34 CFR. 300.624].

Therefore, the department recommends that when a child graduates or otherwise ceases to be enrolled, the district obtains the permission of the parent or adult pupil to maintain IEP team evaluation reports, IEPs, and placement notices for the current fiscal year plus four more years for audit purposes. If the parent requests destruction of the records or will not grant permission to maintain the records for five years, then the Office of Special Education Program (OSEP), U.S. Department of Education, recommends removing the personal identifiers from the records. Once personal identifiers are removed, the records are not pupil records and may be maintained until they are no longer needed to satisfy the federal record maintenance requirement.

RDA Number	Record Series Title	Series Description	PII (See III. above)	Confidential (See IV. above)	Minimum Retention and Disposition	Event Description	Examples/ Notes	Previous RDA Number (if applicable)
PUBSC460	Patient Health Care Records	<p>Per Wis. Stat. § 146.81(4) patient health care records mean all records related to the health of a patient prepared by or under the supervision of a health care provider; and all records made by an ambulance service provider or an emergency medical services practitioner administering emergency care procedures to and handling and transporting sick, disabled, or injured individuals.</p> <p>Records may include but are not limited to:</p> <ul style="list-style-type: none"> -Treatment records from health care providers including mental health providers -Parent's requests and physician's authorization for specialized health care -Billing statements and invoices for treatment or services provided by a health care provider 	Yes	Yes Wis. Stat. §§ 146.81(4), 118.125(2m)(a), FERPA	Event+1 year and destroy confidential	Event is date of creation.	These records do not include physical health records maintained by a school under Behavioral Records.	4.3.1, 4.3.5, 4.3.6
PUBSC480	High School Transcripts and Degrees/Awards	Official high school transcripts and listings of any other degrees/awards received while in high school.	Yes	Yes Wis. Stat. § 118.125; FERPA	Permanent	Retention Justification: These records contain historical information used to make current and future decisions.		4.2.1.9

RDA Number	Record Series Title	Series Description	PII (See III. above)	Confidential (See IV. above)	Minimum Retention and Disposition	Event Description	Examples/ Notes	Previous RDA Number (if applicable)
PUBSC500	4K-8 Report Cards	Report cards received while in elementary and middle school.	Yes	Yes Wis. Stat. § 118.125; FERPA	Event+5 years and destroy confidential	Event is date student graduates or withdraws from district.		4.2.1.8
School Library Records								
PUBSC520	School Library Media Plans	Library program plan created to meet requirements of Wisconsin Administrative Code PI § 8.01(2)(h).	No	No	Event+1 year and destroy	Event is date plan is superseded.		
PUBSC540	Circulation Records	Records documenting the loan of library materials by students and school staff.	May include PII	May include confidential information per Wis. Stat. § 118.125; FERPA	Event+0 and destroy confidential	Event is date item is returned or the item is noted as lost.		22
PUBSC560	Library Use Reports	Records documenting the use of library materials, equipment, services, and space by students and school staff.	No	No	Event+1 year and destroy	Event is date report is superseded.		
PUBSC580	Overdue Notices	Notices sent to students and school staff to remind them to return borrowed items.	May include PII	May include confidential information per Wis. Stat. § 118.125; FERPA	Event+0 and destroy confidential	Event is date item is returned or the item is noted as lost		

RDA Number	Record Series Title	Series Description	PII (See III. above)	Confidential (See IV. above)	Minimum Retention and Disposition	Event Description	Examples/ Notes	Previous RDA Number (if applicable)
PUBSC620	State and Federal Food Service Program Records - Confidential	Records related to state and federally funded food and nutrition programs including the National School Lunch Program, School Breakfast Program, Afterschool Snack Program, Special Milk Program, Wisconsin School Day Milk Program, and Elderly Nutrition Program that include PII of students. Records may include but are not limited to applications for free and reduced-priced meals, direct certification reports, and verification summary and documentation, Community Eligibility Provision (CEP) documentation, monthly claim worksheets for each food nutrition program, benefit issuance lists, and complaints regarding USDA programs.	Yes	Yes Wis. Stat. § 118.125; FERPA	Fiscal+3 years and destroy confidential	Event is end of federal fiscal year.		2.2.34.2, 2.2.34.4, 2.2.34.5, 2.2.34.7, 2.2.47
PUBSC640	Federal Food Service Program Procurement Contracts and Agreement Records	Federal Food Service Program procurement contracts and agreement records may include but are not limited to bids (successful and unsuccessful), food service management company contracts, and joint and vendor agreements for food, equipment, and supplies.	No	No	Event+3 years and destroy	Event is date contract expires or the final payment is recorded, whichever occurs first.		2.2.34.3
School Finance Records								
PUBSC660	School District Debt Documentation	Records documenting debt owed by a school district in the form of long-term bonds, long-term and short-term notes, and land contracts. Records may include but are not limited to indebtedness statements and notifications, approved state trust fund applications, certificates of bond sales, schedules of bond retirements, and cancelled bond of indebtedness and interest.	No	No	Event+7 years and destroy	Event is date debt is paid off or cleared.		2.2.27, 2.2.27.1, 2.2.27.2, 2.2.27.3, 2.2.27.4, 2.2.27.5, 2.2.27.6, 2.2.27.7, 2.2.28

RDA Number	Record Series Title	Series Description	PII (See III. above)	Confidential (See IV. above)	Minimum Retention and Disposition	Event Description	Examples/ Notes	Previous RDA Number (if applicable)
PUBSC680	State Tuition Claim Documentation	Records relating to filing a state tuition claim from the state to Wisconsin school districts for enrolling students who reside in eligible facilities defined by Wis. Stat. § 121.79. Records may include but are not limited to reports, supporting documentation, confirmation of submission, correspondence, inquiries, revisions, and corrections.	Yes	Yes Wis. Stat. § 118.125; FERPA	Event+1 year and destroy	Event is date of final audit of claims.		2.2.37, 2.2.38
PUBSC700	Tuition Waiver Records	Records documenting a request for tuition waiver due to move.	Yes	Yes Wis. Stat. § 118.125	Event+3 years and destroy confidential	Event is date waiver is approved.		5.2.5, 5.2.6, 5.2.7

Closed Series

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A closed series contains records that are no longer created, nor are they expected to be in the future.

RDA Number	Record Series Title	Minimum Retention and Disposition	Rationale
1.5.3	ESEA NCLB Assurances (PI-9550-Assurances)	7 years	Obsolete
1.5.4	Title I Paraprofessional Compliance School Report Summary (PI-9550-II-BB)	7 years	Obsolete
1.5.7	VEERS Composite Enrollment Report (PI-1330-R)	5 years	Obsolete
1.5.8	Vocational Student Concentrator Completer Graduate Follow-up Survey (PI-1335-VEERS)	5 years	Obsolete
1.5.12	Grant Application: Alcohol and Other Drug Abuse Grant (PI-1816)	5 years	Obsolete
1.5.13	State AODA Grants Renewal Form (PI-1813)	5 years	Obsolete
1.5.14	State AODA Grants End of Year Report	5 years	Obsolete

Closed Series

A closed series contains records that are no longer created, nor are they expected to be in the future.

RDA Number	Record Series Title	Minimum Retention and Disposition	Rationale
2.2.9	Regular Tuition Reports (PI-1514)	Permanent	Obsolete
2.2.20	District Equalization Valuation Report	7 years	Records maintained by the Wisconsin Dept. of Revenue.
2.2.21	State Aid Computation Cards (PI-1519)	7 years	Obsolete
2.2.23	State Aid Payment Vouchers (PI-1518)	7 years	Obsolete
2.2.25	Common School Fund Voucher	7 years	Obsolete
2.2.26	State Superintendent Acknowledgment of District Boundary Changes	7 years	Obsolete
2.2.40	Notification to Exceed Revenue Limits (PI-1572-B)	Permanent	Obsolete
2.2.44	District Development Levels Aligned to Grades in PI 34.27.29 (PI-1675)	Permanent	Obsolete
4.1.7	Application for Driver Education Certificates (PI-1715)	1 year	Obsolete
4.3.7	Family Educational Rights and Privacy Act (FERPA) Access Policies	Until superseded	Not a school district record.
5.2.11	State AODA Grants: AODA Program Interim Report (PI-7101/PI-7102)	4 years after end of project	Obsolete

Revision History

A listing of changes to this GRS.

Revision Date	RDA Number	Record Series Title	Revision Made
08/2023	PUBSC440	Individuals with Disabilities Education Act (IDEA) Records	Note amended.
08/2023	PUBSC600	State and Federal Food Service Program Records	Amended.
08/2023	PUBSC620	State and Federal Food Service Program Records - Confidential	Amended.
08/2023	PUBSC640	Federal Food Service Program Procurement Contracts and Agreement Records	Amended.
03/2023		Entire GRS renewal approved.	
02/2023	1.1.3	Citizens Advisory Committee Meeting Minutes	Supersede with Administrative Records GRS.
02/2023	1.1.4	Management Team Meeting Minutes	Supersede with Administrative Records GRS.
02/2023	1.1.5	Reports to the School Board	Supersede with Administrative Records GRS.
02/2023	1.1.6	School Board Policies and Procedures	Supersede with Administrative Records GRS.
02/2023	1.1.7	School Board Correspondence	Supersede with Administrative Records GRS.
02/2023	1.1.8	Management Guidelines	Supersede with Administrative Records GRS. 27
02/2023	1.1.9	Legal Opinions	Supersede with Municipal Records GRS.
02/2023	1.1.10	Notice of Meetings	Supersede with Administrative Records GRS.
02/2023	1.1.11	Petitions	Supersede with Municipal Records GRS.
02/2023	1.1.13	Complaints to the School Board	Supersede with Administrative Records GRS.
02/2023	1.1.14	Newsletters/Bulletins	Supersede with Administrative Records GRS.
02/2023	1.1.15	Special Project Studies/Reports/Strategic Plans/Task Force Reports	Supersede with Administrative Records GRS.
02/2023	1.1.16	Management Correspondence/Memos	Supersede with Administrative Records GRS.
02/2023	1.1.17	Election Notices	Supersede with Municipal Records GRS.
02/2023	1.1.18	Election Petitions	Supersede with Municipal Records GRS.
02/2023	1.1.19	Election Poll Lists	Supersede with Municipal Records GRS.
02/2023	1.1.20	Election Tally	Supersede with Municipal Records GRS.
02/2023	1.1.21	Election Tally Books and Returns	Supersede with Municipal Records GRS.
02/2023	1.1.22	Election Canvassing	Supersede with Municipal Records GRS.
02/2023	1.1.23	Election Registrations	Supersede with Municipal Records GRS.

Revision History

A listing of changes to this GRS.

Revision Date	RDA Number	Record Series Title	Revision Made
02/2023	1.2.2	Architecture Building Blueprints	Supersede with Facilities Records GRS.
02/2023	1.2.3	Building and Site Data Books	Supersede with Facilities Records GRS.
02/2023	1.2.4	Tools and Equipment Inventory	Supersede with Fiscal and Accounting Records GRS.
02/2023	1.2.5	Specification	Supersede with Facilities Records GRS.
02/2023	1.2.6	Building Permits	Supersede with Facilities Records GRS.
02/2023	1.2.7	Electrical Information	Supersede with Facilities Records GRS.
02/2023	1.2.8	Maintenance Requests	Supersede with Facilities Records GRS.
02/2023	1.2.9	Abstract/Deeds/Title Papers/Mortgages	Supersede with Facilities Records GRS.
02/2023	1.2.10	Chemical Wastes Manifest (including asbestos and radon checks)	Supersede with Risk Management Records GRS.
02/2023	1.3.2	Bus Transportation Contract	Supersede with Purchasing and Procurement Records GRS.
02/2023	1.3.4	Financial Statement for Out-of-District Field Trips	Supersede with Fiscal and Accounting Records GRS.
02/2023	1.3.5	Bus Rules/Policy	Supersede with Administrative Records GRS.
02/2023	1.5.1	ESEA Consolidated Application (PI-9550)	Supersede with Administrative Records GRS.
02/2023	1.5.2	ESEA Affirmation of Consultation with Private School Officials (PI-9550-AC)	Supersede with Administrative Records GRS.
02/2023	1.5.6	Carl Perkins Basic Grant Application (PI-1303)	Supersede with Administrative Records GRS.
02/2023	1.5.10	Title I Part C – Education of Migratory Children Local Project Application – Summer (PI-1730)	Supersede with Administrative Records GRS.
02/2023	1.5.11	Title I Comparability Report (PI-1753)	Supersede with Administrative Records GRS.
02/2023	2.1.1	Purchase Requisition	Supersede with Fiscal and Accounting Records GRS.
02/2023	2.1.2	Purchase Orders	Supersede with Purchasing and Procurement Records GRS.
02/2023	2.1.3	Bids & Contracts	Supersede with Purchasing and Procurement Records GRS.
02/2023	2.1.4	Performance Guarantee/Warrant of Vendor	Supersede with Purchasing and Procurement Records GRS.
02/2023	2.1.5	Vacation/Personal Leave Records	Supersede with Payroll Records GRS.
02/2023	2.1.6	W-2 Forms	Supersede with Payroll Records GRS.

Revision History

A listing of changes to this GRS.

Revision Date	RDA Number	Record Series Title	Revision Made
02/2023	2.1.7	W-4 Forms	Supersede with Payroll Records GRS.
02/2023	2.1.8	Social Security Report	Supersede with Payroll Records GRS.
02/2023	2.1.9	Retirement Reports	Supersede with Payroll Records GRS.
02/2023	2.1.10	Enrollment Cards	Supersede with Payroll Records GRS.
02/2023	2.1.11	Disability Insurance	Supersede with Payroll Records GRS.
02/2023	2.1.12	Life Insurance	Supersede with Payroll Records GRS.
02/2023	2.1.13	Health/Dental Insurance	Supersede with Payroll Records GRS.
02/2023	2.1.14	Tax Sheltered Annuity	Supersede with Payroll Records GRS.
02/2023	2.1.15	United Way Contributions	Supersede with Payroll Records GRS.
02/2023	2.1.16	Union Dues	Supersede with Payroll Records GRS.
02/2023	2.1.17	Payroll Distribution Report	Supersede with Payroll Records GRS.
02/2023	2.1.18	Payroll Deduction Report	Supersede with Payroll Records GRS.
02/2023	2.1.19	Additional Pay Authorization Forms	Supersede with Payroll Records GRS.
02/2023	2.1.20	Insurance Reports and Bills	Supersede with Payroll Records GRS.
02/2023	2.1.21	Absence Report/Time Sheets	Supersede with Payroll Records GRS.
02/2023	2.1.22	State and Federal Tax Reports	Supersede with Payroll Records GRS.
02/2023	2.1.23	Stop Payments	Supersede with Fiscal and Accounting Records GRS.
02/2023	2.1.24	Cancelled Payroll Checks	Supersede with Fiscal and Accounting Records GRS.
02/2023	2.2.12	Annual Audit Reports	Supersede with Fiscal and Accounting Records GRS.
02/2023	2.2.13	Disbursement and Receipt Journal	Supersede with Fiscal and Accounting Records GRS.
02/2023	2.2.14	General Ledger – All Funds	Supersede with Fiscal and Accounting Records GRS.
02/2023	2.2.15	Fund Ledger Cards	Supersede with Fiscal and Accounting Records GRS.
02/2023	2.2.16	Canceled General Voucher Checks	Supersede with Fiscal and Accounting Records GRS.
02/2023	2.2.17	Monthly Bank Statements	Supersede with Fiscal and Accounting Records GRS.
02/2023	2.2.18	Monthly Reconciliation Ledger	Supersede with Fiscal and Accounting Records GRS.
02/2023	2.2.19	Bank Deposit Receipts	Supersede with Fiscal and Accounting Records GRS.

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A listing of changes to this GRS.

Revision Date	RDA Number	Record Series Title	Revision Made
02/2023	2.2.29	Invoices	Supersede with Fiscal and Accounting Records GRS.
02/2023	2.2.30	Short-Term Contracts for Contest Officials (e.g., spelling bee, Academic Decathlon, etc.)	Supersede with Human Resources Records GRS.
02/2023	2.2.31	Short-Term Contracts for Athletic Officials (seasonal referee, etc.)	Supersede with Human Resources Records GRS.
02/2023	2.2.32	Insurance Policies	Supersede with Human Resources Records GRS.
02/2023	2.2.33	Damage and Loss Reports	Supersede with Risk Management Records GRS.
02/2023	2.2.35	Grant Applications – Successful ++	Supersede with Administrative Records GRS.
02/2023	2.2.36	Grant Applications – Unsuccessful	Supersede with Administrative Records GRS.
02/2023	2.2.42	Mentoring Grant for Initial Educators (PI-1640)	Supersede with Administrative Records GRS.
02/2023	2.2.43	Peer Review and Mentoring Grants (PI-1653)	Supersede with Administrative Records GRS.
02/2023	3.1.1	Teaching Certificates (Including permits and certifications)	Supersede with Human Resources Records GRS.
02/2023	3.1.2	Transcript of College Credit	Supersede with Human Resources Records GRS.
02/2023	3.1.3	Certified Staff Certificates of Previous Experience	Supersede with Human Resources Records GRS. 30
02/2023	3.1.4	Evaluation Records	Supersede with Human Resources Records GRS.
02/2023	3.1.5	Individual Teaching Contracts	Supersede with Human Resources Records GRS.
02/2023	3.1.6	Other Individual Employment Contracts	Supersede with Human Resources Records GRS.
02/2023	3.1.7	Applications (Hired)	Supersede with Human Resources Records GRS.
02/2023	3.1.8	Applications (Not Hired)	Supersede with Human Resources Records GRS.
02/2023	3.1.9	Immigration and Nationalization Services INS-9 Forms	Supersede with Human Resources Records GRS.
02/2023	3.1.10	Staff Accident Reports	Supersede with Human Resources Records GRS.
02/2023	3.1.10.1	Injury Claims	Supersede with Human Resources Records GRS.
02/2023	3.1.10.2	Workers Compensation	Supersede with Human Resources Records GRS.
02/2023	3.1.10.3	Public Liability	Supersede with Human Resources Records GRS.
02/2023	3.1.10.4	Settlements	Supersede with Human Resources Records GRS.
02/2023	3.1.11	Medical Records	Supersede with Human Resources Records GRS.
02/2023	3.1.11.1	Physical Examinations	Supersede with Human Resources Records GRS.

Revision History

A listing of changes to this GRS.

Revision Date	RDA Number	Record Series Title	Revision Made
02/2023	3.1.11.2	TB Tests	Supersede with Human Resources Records GRS.
02/2023	3.1.12	Health & Dental Insurance Waivers	Supersede with Human Resources Records GRS.
02/2023	3.1.13	Affirmative Action Files	Supersede with Human Resources Records GRS.
02/2023	3.1.14	Arbitration Decisions – Negotiator	Supersede with Human Resources Records GRS.
02/2023	3/1/2023	Athletic Activity Contracts	Supersede with Human Resources Records GRS.
02/2023	3.1.16	Classification Studies – Description of job duties of individual school district positions.	Supersede with Human Resources Records GRS.
02/2023	3.1.17	Disability Insurance Claims – Claims filed by employees for disability insurance program.	Supersede with Human Resources Records GRS.
02/2023	3.1.18	Eligibility Register – List of job applicants who have qualified for positions within district.	Supersede with Human Resources Records GRS.
02/2023	3.1.19	Employee Deficiency/Termination Reports	Supersede with Human Resources Records GRS.
02/2023	3.1.20	Equal Employment Opportunity Reports/Summary Data Reports sent to Federal Government	Supersede with Human Resources Records GRS.
02/2023	3.1.21	Fair Labor Standards Act – Salary schedules, employee classification, compensation periods, work schedules/periods	Supersede with Human Resources Records GRS.
02/2023	3.1.22	Grievance Files – Employee grievances and/or complaints filed under a labor agreement or personnel rules. This also relates to arbitration files and related court cases.	Supersede with Human Resources Records GRS.
02/2023	3.1.23	Insurance Certificates and Policies	Supersede with Human Resources Records GRS.
02/2023	3.1.24	Insurance Premium Reports	Supersede with Human Resources Records GRS.
02/2023	3.1.25	Insurance Working Files	Supersede with Human Resources Records GRS.
02/2023	3.1.26	Labor Union – Contracts	Supersede with Human Resources Records GRS.
02/2023	3.1.27	Labor Union – Disputes	Supersede with Human Resources Records GRS.
02/2023	3.1.28	Labor Union – Negotiations Minutes	Supersede with Human Resources Records GRS.
02/2023	3.1.29	Non-Union Salary Determination – Annual salary schedules for all non – union employees.	Supersede with Human Resources Records GRS.
02/2023	3.1.30	OSHA – Employee Accident Reports	Supersede with Human Resources Records GRS.
02/2023	3.1.31	OSHA – Employee Exposure Records	Supersede with Human Resources Records GRS.
02/2023	3.1.32	OSHA – Employee Medical Records	Supersede with Human Resources Records GRS.

Revision History

A listing of changes to this GRS.

Revision Date	RDA Number	Record Series Title	Revision Made
02/2023	3.1.33	Performance of Work Contracts	Supersede with Human Resources Records GRS.
02/2023	3.1.34	Personnel Files	Supersede with Human Resources Records GRS.
02/2023	3.1.35	Personnel files – Summer School	Supersede with Human Resources Records GRS.
02/2023	3.1.36	Personnel and Promotion List	Supersede with Human Resources Records GRS.
02/2023	3.1.37	Position Recruitment File	Supersede with Human Resources Records GRS.
02/2023	3.1.38	Requisition for Personnel	Supersede with Human Resources Records GRS.
02/2023	3.1.39	Substitute Teacher Reports	Supersede with Human Resources Records GRS.
02/2023	3.1.40	Unemployment Claims/Compensation	Supersede with Human Resources Records GRS.
02/2023	3.1.41	Summons/Pleadings, Other Legal Documents	Supersede with Human Resources Records GRS.
02/2023	3.1.42	Notices of Claims	Supersede with Human Resources Records GRS.
02/2023	4.1.16	Lesson Plans	Supersede with Administrative Records GRS.
02/2023	5.1.1	Special Education Plan/Claim (PI-2199 or equivalent)	Supersede with Administrative Records GRS. 32
02/2023	5.1.2	IDEA Application/Plan (PI-2111)	Supersede with Administrative Records GRS.
02/2023	5.1.2.1	Flow-Through Funds	Supersede with Administrative Records GRS.
02/2023	5.1.2.2	Discretionary Funds	Supersede with Administrative Records GRS.
02/2023	5.1.2.3	Local Educational Agency Transfer Funds	Supersede with Administrative Records GRS.
02/2023	5.1.2.4	Preschool Entitlement Funds	Supersede with Administrative Records GRS.
02/2023	5.1.2.5	Preschool Discretionary Funds	Supersede with Administrative Records GRS.
02/2023	5.1.5	National Instructional Materials Access Center and Accessibility Standard Statement of Assurance (PI-2194)	Supersede with Administrative Records GRS.
02/2023	5.2.19	Application to Offer GED Option #2 (PI-8201)	Supersede with Administrative Records GRS.
02/2023	5.2.21	Local Use Form; Homeless Student Identification (PI-Q03-8)	Supersede with Administrative Records GRS.
02/2023	5.2.9	Alternative Education Program Grant Application (PI-9710)	Supersede with Administrative Records GRS.
02/2023	5.2.10	Disproportionality Application (PI-8801)	Supersede with Administrative Records GRS.
02/2023	5.2.17	High Cost Special Education Initiative Claim Form (Pi-1570)	Supersede with Administrative Records GRS.



Wisconsin Public School District
GENERAL RECORDS SCHEDULE
Crosswalk

Revised October 2023

Introduction

In March 2023, the Public Records Board approved a new Wisconsin Public School District General Records Schedule (the 2023 GRS). The 2023 GRS governs the records retention obligations of school districts under Wis. Stat. § 16.61, and applies to “public records” as defined in Wis. Stat. § 16.61(2)(b). The 2023 GRS replaces the prior version of the Wisconsin Records Retention Schedule for School Districts, previously adopted in 2010 (the 2010 GRS).

The transition to the 2023 GRS is significant. The 2023 GRS now only includes records that are unique to school districts. The PRB directed that retention schedules from the 2010 GRS that include non-school district specific records should be superseded by other state and local retention schedules approved and made available by the PRB.

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This crosswalk attempts to identify the state and local retention schedules that most closely align with superseded 2010 GRS retention schedules in order to aid school districts in transitioning to use of the retention schedules approved and made available by the PRB. The crosswalk represents the DPI's opinion only. It is not prescriptive, does not represent the opinion of the PRB, and should not be considered legal advice.

This crosswalk displays each superseded 2010 GRS retention schedule. Each superseded 2010 GRS retention schedule crosswalks to a PRB approved retention schedule, and identifies its location within other state and local general records schedules. Because the 2010 GRS did not include record series descriptions, some crosswalks include more than one retention schedule, and the crosswalk may reference a retention schedule that does not accurately describe a given record. School districts should consult with legal counsel when applying retention schedules to specific documents.

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Locating Retention Schedules

The prefix of an RDA number assigned to a record series correlates with the General Records Schedule to use to locate the retention schedule for additional details. Use the chart below to assist in this process.

Public Records Board General Retention Schedules

State General Records Schedules <https://publicrecordsboard.wi.gov/Pages/GRS/Statewide.aspx>

- Administrative Records ADMIN
- Budget Records BUD
- Facilities Records FAC
- Fiscal and Accounting Records FIS
- Human Resources Records HR
- Information Technology Records IT
- Payroll and Benefits Records PAY
- Purchasing and Procurement Records PUR
- Risk Management Records RISK

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Local General Records Schedules <https://publicrecordsboard.wi.gov/Pages/GRS/LocalUnit.aspx>

- Municipal Records N/A*
- School District Records PUBSC

* No RDA numbers are assigned to schedules in this General Records Schedule.

* No RDA numbers are assigned to schedules in this General Records Schedule.

ADMINISTRATIVE RECORDS – SCHOOL BOARD RECORDS

1.1.0	Expired School Districts GRS (2010) School Board Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule*
1.1.1	School Board Meeting Minutes and Agenda Packets ***	Permanent	Public School District GRS	PUBSC100 School Board and School Board Committee Meeting Materials - Open Session, Permanent; PUBSC120 School Board and School Board Committee Meeting Materials - Closed Session, Permanent
1.1.2	School Board Committee Meeting Minutes	Permanent	Public School District GRS	PUBSC100 School Board and School Board Committee Meeting Materials - Open Session, Permanent; PUBSC120 School Board and School Board Committee Meeting Materials - Closed ₃₉ Session, Permanent
1.1.3	Citizens Advisory Committee Meeting Minutes	3 years	Administrative Records GRS	ADMIN402 Project Records, EVT + 5 years and destroy / Event is date of project completion; ADMIN403 Project Records - Historically Significant, EVT + 5 years and transfer to Wisconsin Historical Society / Event is date of project completion
1.1.4	Management Team Meeting Minutes	3 years	Administrative Records GRS	ADMIN350 Internal Communications, EVT + 3 years and destroy confidential / Event is date disseminated

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School Board Records (continued)

1.1.0	Expired School Districts GRS (2010) School Board Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule*
1.1.5	Reports to the School Board	3 years	Administrative Records GRS	ADMIN350 Internal Communications, EVT + 3 years and destroy confidential / Event is date disseminated; ADMIN351 External Communications, EVT + 3 years and transfer to Wisconsin Historical Society / Event is date disseminated
1.1.6	School Board Policies and Procedures	Until superseded	Municipal Records GRS	Internal Policies and Procedures, EVT + 7 years and destroy / Event is date the policy/procedure is superseded or made obsolete
1.1.7	School Board Correspondence	3 years	Administrative Records GRS	ADMIN350 Internal Communications, EVT + 3 years and destroy confidential / Event is date ⁴⁰ disseminated; ADMIN351 External Communications, EVT + 3 years and transfer to Wisconsin Historical Society / Event is date disseminated
1.1.8	Management Guidelines	Until superseded	Administrative Records GRS	ADMIN400 Policies and Procedures, EVT + 7 years and destroy / Event is date policy or procedure is superseded or obsolete
1.1.9	Legal Opinions	7 years	Municipal Records GRS	Attorney Opinions, Permanent
1.1.10	Notice of Meetings	7 years	Administrative Records GRS	ADMIN303 Legal Notices, CR + 1 year and destroy / Event is date of creation

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School Board Records (continued)

1.1.0	Expired School Districts GRS (2010) School Board Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule*
1.1.11	Petitions	7 years	Municipal Records GRS	Petitions, EVT + 7 years and destroy / Event is date petition is approved or denied
1.1.12	Referendum Results	Permanent	Public School District GRS	PUBSC160 Referendum Results, Permanent
1.1.13	Complaints to the School Board	3 years	Administrative Records GRS	ADMIN353 External Complaints, EVT + 2 years and destroy confidential / Event is date of complaint resolution, dismissal or end of litigation
1.1.14	Newsletters/Bulletins	1 year	Administrative Records GRS	ADMIN350 Internal Communications, EVT + 3 years and destroy confidential / Event is date ⁴¹ disseminated; ADMIN351 External Communications, EVT + 3 years and transfer to Wisconsin Historical Society / Event is date disseminated
1.1.15	Special Project Studies/Reports/Strategic Plans/Task Force Reports	3 years	Administrative Records GRS	ADMIN250 Organizational Planning Documentation, EVT + 6 years and transfer to Wisconsin Historical Society / Event is date plan is completed or superseded; ADMIN402 Project Records, EVT + 5 years and destroy / Event is date of project completion; ADMIN403 Project Records - Historically Significant, EVT + 5 years and transfer to the Wisconsin Historical Society / Event is date of project completion

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School Board Records (continued)

1.1.0	Expired School Districts GRS (2010) School Board Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule*
1.1.16	Management Correspondence/Memos	1 year ¹	Administrative Records GRS	ADMIN350 Internal Communications, EVT + 3 years and destroy confidential / Event is date disseminated; ADMIN351 External Communications, EVT + 3 years and transfer to Wisconsin Historical Society / Event is date disseminated
1.1.17	Election Notices	2 years following the elections	Municipal Records GRS	Election Notices, EVT + 1 year and destroy / Event is date of the election; Election Notices (Federal Elections), Event + 22 months and destroy / Event is date of the election
1.1.18	Election Petitions	2 years following the elections	Municipal Records GRS	Election Notices, EVT + 1 year and destroy / ⁴² Event is date of the election; Election Notices (Federal Elections), Event + 22 months and destroy / Event is date of the election
1.1.17	Election Notices	2 years following the elections	Municipal Records GRS	Election Notices, EVT + 1 year and destroy / Event is date of the election; Election Notices (Federal Elections), Event + 22 months and destroy / Event is date of the election
1.1.18	Election Petitions	2 years following the elections	Municipal Records GRS	Election Notices, EVT + 1 year and destroy / Event is date of the election; Election Notices (Federal Elections), Event + 22 months and destroy / Event is date of the election

¹ unless subject to complaint, or lawsuit, or is a record type that requires longer retention.

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School Board Records (continued)

1.1.0	Expired School Districts GRS (2010) School Board Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule*
1.1.20	Election Tally	2 years following the elections	Municipal Records GRS	Official Canvassers Statements, EVT + 10 years and destroy / Event is date of the election
1.1.21	Election Tally Books and Returns	2 years following the elections	Municipal Records GRS	Official Canvassers Statements, EVT + 10 years and destroy / Event is date of the election
1.1.22	Election Canvassing	10 years following elections	Municipal Records GRS	Official Canvassers Statements, EVT + 10 years and destroy / Event is date of the election
1.1.23	Election Registrations	2 years following voter registration	Municipal Records GRS	Election Voting and Registration Statistics ⁴³ Reports, Event + 22 months and destroy / Event is date of the election

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ADMINISTRATIVE RECORDS – BUILDING AND GROUNDS RECORDS

1.2.0	Expired School Districts GRS (2010) Building and Grounds Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule*
1.2.1	School District boundaries (and Plats) (including acknowledgments of changes)	Permanent	Public School District GRS	PUBSC180 School District Boundary Acknowledgements, Permanent
1.2.2	Architecture Building Blueprints	Life of building	Facilities Records GRS	FAC00015 As-Built Plans and Original Building Drawings for Completed Construction Projects, EVT + 6 years and transfer to Wisconsin Historical Society / Event is date of termination of ownership
1.2.3	Building and Site Data Books	Permanent	Facilities Records GRS	FAC00016 Land Titles, Conveyances, Easements ₄₄ and Use Restrictions, Permanent
1.2.4	Tools and Equipment Inventory	Retain until superseded	Fiscal and Accounting Records GRS	FIS00050 Inventories - Capital Equipment, Supplies, Commodities and Parts, FIS + 4 years and destroy / Event is end of fiscal year
1.2.5	Specification	Life of building	Facilities Records GRS	FAC00015 As-Built Plans and Original Building Drawings for Completed Construction Projects, EVT + 6 years and transfer to Wisconsin Historical Society / Event is date of termination of ownership
1.2.6	Building Permits	6 years after acceptance	Facilities Records GRS	FAC00011 Construction Project File; FAC00012 Construction Project File - Historically Significant Facilities

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School Board Records (continued)

1.2.0	Expired School Districts GRS (2010) Building and Grounds Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule*
1.2.7	Electrical Information	Life of building	Facilities Records GRS	FAC00015 As-Built Plans and Original Building Drawings for Completed Construction Projects, EVT + 6 years and transfer to Wisconsin Historical Society / Event is date of termination of ownership
1.2.8	Maintenance Requests	1 year	Facilities Records GRS	FAC00051 Facility and Building Maintenance, CR + 3 years and destroy confidential / Event is date of creation
1.2.9	Abstract/Deeds/Title Papers/Mortgages	Permanent	Facilities Records GRS	FAC00016 Land Titles, Conveyances, Easements, and Use Restrictions, Permanent
1.2.10	Chemical Wastes Manifest (including asbestos and radon checks)	Permanent	Facilities Records GRS	FAC00013 Asbestos and Hazardous Material and Environmental Remediation Case File, Permanent ⁴⁵

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ADMINISTRATIVE RECORDS – TRANSPORTATION RECORDS

1.3.0	Expired School Districts GRS (2010) Transportation Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule*
1.3.1	Parent or Other School District Transportation Contracts	6 years	Public School District GRS	PUBSC220 Parent or Other School District Transportation Contracts, EVT + 1 year and destroy confidential / Event is date of the end of the school year
1.3.2	Bus Transportation Contract	4 years after expiration	Purchasing and Procurement Records GRS	PUR00010 Contract and Request for Bid / Proposal File, EVT + 6 years and destroy / Event is date resulting in contract or cancellation of contract or bid/proposal
1.3.3	Field Trip Permission Request	1 year	Public School District GRS	PUBSC400 Behavioral Records, EVT + 1 year and destroy confidential / Event is date of creation
1.3.4	Financial Statement for Out-of-District Field Trips	1 year	Fiscal and Accounting Records GRS	FIS00020 Receipts and Disbursement Transactions, FIS + 6 years and destroy / Event is end of fiscal year ⁴⁶
1.3.5	Bus Rules/Policy	Until superseded	Municipal Records GRS	Internal Policies and Procedures, EVT + 7 years and destroy / Event is date the policy/procedure is superseded or made obsolete
1.3.6	Bus Route Listing	4 years	Public School District GRS	PUBSC240 Transportation Aid Records, EVT + 4 years and destroy confidential / Event is date of the end of school year
1.3.7	School Bus Accident Report	7 years	Public School District GRS	PUBSC400 Behavioral Records, EVT + 1 year and destroy confidential / Event is date of creation

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School Board Records (continued)

1.3.8	Pupil Transportation Report	7 years	Public School District GRS	PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI
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ADMINISTRATIVE RECORDS – STATISTICAL RECORDS

1.4.0	Expired School Districts GRS (2010) Statistical Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule*
1.4.1	Wisconsin School Directory update (PI-1280) & Verification of Private Schools Within Public District (PI-1201)	1 year	Public School District GRS	PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI ⁴⁷
1.4.2	Pupil Nondiscrimination and Educational Equity Report (PI-1197B)	7 years	Public School District GRS	PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI
1.4.3	Fall Staff Reports (PI-1202)	3 years	Public School District GRS	PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI

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1.4.4	School District Statistical Report (PI-1203)	7 years	Public School District GRS	PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI
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ADMINISTRATIVE RECORDS – PROGRAM APPLICATIONS/EVALUATIONS

1.5.0	Expired School Districts GRS (2010) Program Applications/Evaluations	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule*
1.5.1	ESEA Consolidated Application (PI-9550)	5 years	Administrative Records GRS	ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent
1.5.2	ESEA Affirmation of Consultation with Private School Officials (PI-9550-AC)	7 years	Administrative Records GRS	ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent
1.5.3	ESEA NCLB Assurances (PI-9550-Assurances)	7 years	Administrative Records GRS	ADMIN406 Grants, EVT + 4 years and destroy ⁴⁹ confidential / Event is date of final report or denial is received/sent
1.5.4	Title I Paraprofessional Compliance School Report Summary (PI-9550-II-BB)	7 years		Closed
1.5.5	Application – Alcohol/Traffic Safety Chapter 20	5 years	Public School District GRS	PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI

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Program Applications/Evaluations (continued)

1.5.0	Expired School Districts GRS (2010) Program Applications/Evaluations	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule*
1.5.6	Carl Perkins Basic Grant Application (PI-1303)	5 years	Administrative Records GRS	ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent
1.5.7	VEERS Composite Enrollment Report (PI-1330-R)	5 years		Closed
1.5.8	Vocational Student Concentrator Completer Graduate Follow-up Survey (PI-1335-VEERS)	5 years		Closed
1.5.9	Summer School Program Report – ITP Summary (PI-1805)	5 years	Public School District GRS	PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI
1.5.10	Title I Part C – Education of Migratory Children Local Project Application – Summer (PI-1730)	5 years	Administrative Records GRS	ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent

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Program Applications/Evaluations (continued)

1.5.0	Expired School Districts GRS (2010) Program Applications/Evaluations	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule*
1.5.11	Title I Comparability Report (PI-1753)	7 years	Administrative Records GRS	ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent
1.5.12	Grant Application: Alcohol and Other Drug Abuse Grant (PI-1816)	5 years	Administrative Records GRS	ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent
1.5.13	State AODA Grants Renewal Form (PI-1813)	5 years	Administrative Records GRS	ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent
1.5.14	State AODA Grants End of Year Report	5 years	Administrative Records GRS	ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent
1.5.15	Annual Report for Children at Risk Program (PI-2375) (when identified)	5 years	Public School District GRS	PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI

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FINANCE RECORDS - PURCHASING/PAYROLL RECORDS

2.1.0	Expired School Districts GRS (2010) Purchasing/Payroll Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule *
2.1.1	Purchase Requisition	1 year	Purchasing and Procurement Records GRS	PUR00010 Contract and Request for Bid / Proposal File, EVT + 6 years and destroy / Event is date resulting in contract or cancellation of contract or bid/proposal
2.1.2	Purchase Orders	3 years	Fiscal and Accounting Records GRS	FIS00020 Receipts and Disbursement Transactions, FIS + 6 years and destroy / Event is end of fiscal year
2.1.3	Bids & Contracts	3 years	Purchasing and Procurement Records GRS	PUR00010 Contract and Request for Bid / Proposal File, EVT + 6 years and destroy / Event is date resulting in contract or cancellation of contract or bid/proposal 52
2.1.4	Performance Guarantee/Warrant of Vendor	Until expiration of the warranty	Purchasing and Procurement Records GRS	PUR00010 Contract and Request for Bid / Proposal File, EVT + 6 years and destroy / Event is date resulting in contract or cancellation of contract or bid/proposal
2.1.5	Vacation/Personal Leave Records	3 years from time of record creation	Payroll Records GRS	PAY00005 Leave Accounting Records, EVT + 15 years and destroy confidential / Event is last date of pay period; PAY00012 Payroll and Benefits Reports, EVT + 5 years and destroy confidential / Event is date report is generated

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Purchasing/Payroll Records (continued)

2.1.0	Expired School Districts GRS (2010) Purchasing/Payroll Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule *
2.1.6	W-2 Forms	7 years	Payroll Records GRS	PAY00016 Master Pay Period Record, EVT + 15 years and destroy confidential / Event is end of calendar year
2.1.7	W-4 Forms	4 years	Payroll Records GRS	PAY00021 Employee Payroll and Benefit Records, EVT + 8 years and destroy confidential / Event is date of termination of state service
2.1.8	Social Security Report	7 years after retirement	Payroll Records GRS	FIS00026 Tax Records, FIS + 6 years and destroy confidential / Event is end of fiscal year
2.1.9	Retirement Reports	7 years after retirement	Payroll Records GRS	PAY00012 Payroll and Benefits Reports, EVT + 5 years and destroy confidential / Event is date ⁵³ report is generated
2.1.10	Enrollment Cards	Maintain 7 years after retirement, resignation or termination	Payroll Records GRS	PAY00021 Employee Payroll and Benefit Records, EVT + 8 years and destroy confidential / Event is date of termination of state service
2.1.11	Disability Insurance	Maintain 7 years after retirement, resignation or termination	Payroll Records GRS	PAY00021 Employee Payroll and Benefit Records, EVT + 8 years and destroy confidential / Event is date of termination of state service
	Complaints to the School Board	3 years	Administrative Records GRS	ADMIN353 External Complaints, EVT + 2 years and destroy confidential / Event is date of complaint resolution, dismissal or end of litigation

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Purchasing/Payroll Records (continued)

2.1.0	Expired School Districts GRS (2010) Purchasing/Payroll Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule *
2.1.12	Life Insurance	Maintain 7 years after retirement, resignation or termination	Payroll Records GRS	PAY00021 Employee Payroll and Benefit Records, EVT + 8 years and destroy confidential / Event is date of termination of state service
2.1.13	Health/Dental Insurance	Maintain 7 years after retirement, resignation or termination.	Payroll Records GRS	PAY00021 Employee Payroll and Benefit Records, EVT + 8 years and destroy confidential / Event is date of termination of state service
2.1.14	Tax Sheltered Annuity	Maintain 7 years after retirement	Payroll Records GRS	PAY00021 Employee Payroll and Benefit Records, EVT + 8 years and destroy confidential / Event is date of termination of state service
2.1.15	United Way Contributions	1 year	Payroll Records GRS	PAY00011 Payroll Registers, EVT + 4 years and ⁵⁴ destroy confidential / Event is last date of pay period
2.1.16	Union Dues	Current year	Payroll Records GRS	PAY00011 Payroll Registers, EVT + 4 years and destroy confidential / Event is last date of pay period
2.1.17	Payroll Distribution Report	4 years	Payroll Records GRS	PAY00011 Payroll Registers, EVT + 4 years and destroy confidential / Event is last date of pay period
2.1.18	Payroll Deduction Report	4 years	Payroll Records GRS	PAY00011 Payroll Registers, EVT + 4 years and destroy confidential / Event is last date of pay period

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Purchasing/Payroll Records (continued)

2.1.0	Expired School Districts GRS (2010) Purchasing/Payroll Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule *
2.1.19	Additional Pay Authorization Forms	4 years	Payroll Records GRS	PAY00011 Payroll Registers, EVT + 4 years and destroy confidential / Event is last date of pay period
2.1.20	Insurance Reports and Bills	7 years after date of retirement, resignation or termination.	Fiscal and Accounting Records GRS	FIS00020 Receipts and Disbursement Transactions, FIS + 6 years and destroy / Event is end of fiscal year
2.1.21	Absence Report/Time Sheets	7 years after date of retirement, resignation or termination	Payroll Records GRS	PAY00016 Master Pay Period Record, EVT + 15 years and destroy confidential / Event is end of calendar year
2.1.22	State and Federal Tax Reports	4 years	Payroll Records GRS	PAY00016 Master Pay Period Record, EVT + 15 years and destroy confidential / Event is end of calendar year
2.1.23	Stop Payments	4 years	Fiscal and Accounting Records GRS	FIS00029 Forgery and Stop Payment Records, EVT + 6 years and destroy confidential / Event is date, batched by month, which the stop payment was executed
2.1.24	Cancelled Payroll Checks	4 years	Fiscal and Accounting Records GRS	FIS00027 Paid/Canceled Checks, EVT + 7 years and destroy confidential / Event is month paid

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FINANCE RECORDS - ACCOUNTING/BUDGET RECORDS

2.2.0	Expired School Districts GRS (2010) Accounting/Budget Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule *
2.2.1	Budget Report (PI-1504)	Permanent	Public School District GRS	PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI
2.2.2	Annual Report (PI-1505)	Permanent	Public School District GRS	PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI
2.2.3	Annual Report Calendar (PI-1505 Calendar)	1 year	Public School District GRS	PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI
2.2.4	Annual Report (Aid Certification Data) (PI-1505-AC)	Permanent	Public School District GRS	PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI
2.2.5	Special Education Fiscal Report– Annual (PI-1505-SE)	Permanent	Public School District GRS	PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI

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Accounting/Budget (continued)

2.2.0	Expired School Districts GRS (2010) Accounting/Budget Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule *
2.2.6	Special Education Fiscal Report Budget (PI-1505-SE Budget)	1 year	Public School District GRS	PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI
2.2.7	Audited Annual Report (Aid Certification Data) (PI-1506-AC)	1 year	Public School District GRS	PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI
2.2.8	Financial Audit Statement (PI-1506)	Permanent	Public School District GRS	PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI
2.2.9	Regular Tuition Reports (PI-1514)	Permanent		Closed
2.2.10	Summer School (PI-1804)	1 year after audit	Public School District GRS	PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI
2.2.11	Annual Budget Report (DPI)	Permanent	Public School District GRS	PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI

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Accounting/Budget (continued)

2.2.0	Expired School Districts GRS (2010) Accounting/Budget Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule *
2.2.12	Annual Audit Reports	Permanent	Fiscal and Accounting Records GRS	FIS00001 Audit Reports, Agency Responses and Audit Finding Resolutions, EVT + 3 years and destroy / Event is the date of issuance of final report
2.2.13	Disbursement and Receipt Journal	7 years	Fiscal and Accounting Records GRS	FIS00020 Receipts and Disbursement Transactions, FIS + 6 years and destroy / Event is end of fiscal year
2.2.14	General Ledger – All Funds	7 years	Fiscal and Accounting Records GRS	FIS00020 Receipts and Disbursement Transactions, FIS + 6 years and destroy / Event is end of fiscal year
2.2.15	Fund Ledger Cards	7 years	Fiscal and Accounting Records GRS	FIS00020 Receipts and Disbursement Transactions, FIS + 6 years and destroy / Event is end of fiscal year 58
2.2.16	Canceled General Voucher Checks	7 years	Fiscal and Accounting Records GRS	FIS00027 Paid/Canceled Checks, EVT + 7 years and destroy confidential / Event is month paid
2.2.17	Monthly Bank Statements	7 years	Fiscal and Accounting Records GRS	FIS00020 Receipts and Disbursement Transactions, FIS + 6 years and destroy / Event is end of fiscal year
2.2.18	Monthly Reconciliation Ledger	7 years	Fiscal and Accounting Records GRS	FIS00020 Receipts and Disbursement Transactions, FIS + 6 years and destroy / Event is end of fiscal year

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Accounting/Budget (continued)

2.2.0	Expired School Districts GRS (2010) Accounting/Budget Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule *
2.2.19	Bank Deposit Receipts	7 years	Fiscal and Accounting Records GRS	FIS00020 Receipts and Disbursement Transactions, FIS + 6 years and destroy / Event is end of fiscal year
2.2.20	District Equalization Valuation Report	7 years		Closed
2.2.21	State Aid Computation Cards (PI- 1519)	7 years		Closed
2.2.22	Tax Levy Certification (PI-401)	7 years	Public School District GRS	PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI ⁵⁹
2.2.23	State Aid Payment Vouchers (PI- 1518)	7 years		Closed
2.2.24	Pupil Transportation (PI-1547)	7 years	Public School District GRS	PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI
2.2.25	Common School Fund Voucher	7 years		Closed
2.2.26	State Superintendent Acknowledgment of District Boundary Changes	7 years		Closed

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Accounting/Budget (continued)

2.2.0	Expired School Districts GRS (2010) Accounting/Budget Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule *
2.2.27	Outstanding Long-Term Indebtedness Statements/Notification	Permanent	Public School District GRS	PUBSC660 School District Debt Documentation, EVT + 7 years and destroy / Event is date debt is paid off or cleared
2.2.27.1	Long-Term Bonds	Permanent	Public School District GRS	PUBSC660 School District Debt Documentation, EVT + 7 years and destroy / Event is date debt is paid off or cleared
2.2.27.2	Long-Term Notes	Permanent	Public School District GRS	PUBSC660 School District Debt Documentation, EVT + 7 years and destroy / Event is date debt is paid off or cleared
2.2.27.3	Short-Term Notes	Permanent	Public School District GRS	PUBSC660 School District Debt Documentation, EVT + 7 years and destroy / Event is date debt is paid off or cleared
2.2.27.4	Approved State Trust Fund Application	Permanent	Public School District GRS	PUBSC660 School District Debt Documentation, EVT + 7 years and destroy / Event is date debt is paid off or cleared
2.2.22.5	Land Contracts	Permanent	Public School District GRS	PUBSC660 School District Debt Documentation, EVT + 7 years and destroy / Event is date debt is paid off or cleared
2.2.27.6	Certificate of Bond Sale	Permanent	Public School District GRS	PUBSC660 School District Debt Documentation, EVT + 7 years and destroy / Event is date debt is paid off or cleared

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Accounting/Budget (continued)

2.2.0	Expired School Districts GRS (2010) Accounting/Budget Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule *
2.2.27.7	Schedule of Bond Retirements	Permanent	Public School District GRS	PUBSC660 School District Debt Documentation, EVT + 7 years and destroy / Event is date debt is paid off or cleared
2.2.28	Canceled Bonds of Indebtedness and Interest	7 years	Public School District GRS	PUBSC660 School District Debt Documentation, EVT + 7 years and destroy / Event is date debt is paid off or cleared
2.2.29	Invoices	7 years	Fiscal and Accounting Records GRS	FIS00020 Receipts and Disbursement Transactions, FIS + 6 years and destroy / Event is end of fiscal year
2.2.30	Short-Term Contracts for Contest Officials (e.g., spelling bee, Academic Decathlon, etc.)	3 years	Human Resources Records GRS	HR000190 Official Personnel File, EVT + 8 years and destroy confidential / Event is termination from state service
2.2.31	Short-Term Contracts for Athletic Officials (seasonal referee, etc.)	3 years	Human Resources Records GRS	HR000190 Official Personnel File, EVT + 8 years and destroy confidential / Event is termination from state service
2.2.32	Insurance Policies	7 years	Risk Management GRS	RISK0025 Property Insurance Policies (General & Excess), EVT + 30 years and destroy, Event is date of policy
2.2.33	Damage and Loss Reports	7 years	Risk Management GRS	RISK0026 Property Claim Files, EVT + 5 years and destroy confidential / Event is date claim is closed

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FINANCE RECORDS – FOOD SERVICES RECORDS

2.2.34.0	Expired School Districts GRS (2010) Food Services Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule *
2.2.34.1	Application/Agreement/Policy Statements for Food and Nutrition Programs	5 years	Public School District GRS	PUBSC600 State and Federal Food Service Program Records, FIS + 3 years and destroy / Event is end of federal fiscal year
2.2.34.2	Applications for Free and Reduced Price Meals	5 years	Public School District GRS	PUBSC620 State and Federal Food Service Program Records - Confidential, FIS + 3 years and destroy confidential / Event is end of federal fiscal year
2.2.34.3	Joint Agreement/Vendor – Management Company Verification Summary/Documentation	Current fiscal year plus 4 years	Public School District GRS	PUBSC640 Federal Food Service Program Procurement Contract and Agreement Records, EVT + 3 years and destroy / Event is date contract expires or final payment is recorded, whichever occurs first ⁶²
2.2.34.4	Daily Participation Record (by building)	Current fiscal year plus 4 years	Public School District GRS	PUBSC620 State and Federal Food Service Program Records - Confidential, FIS + 3 years and destroy confidential / Event is end of federal fiscal year
2.2.34.5	Daily Participation Record (by district)	Current fiscal year plus 4 years	Public School District GRS	PUBSC620 State and Federal Food Service Program Records - Confidential, FIS + 3 years and destroy confidential / Event is end of federal fiscal year

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Food Service Records (continued)

2.2.34.0	Expired School Districts GRS (2010) Food Services Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule *
2.2.34.6	Menus/Production Record (lunch and breakfast)	Current fiscal year plus 4 years	Public School District GRS	PUBSC600 State and Federal Food Service Program Records, FIS + 3 years and destroy / Event is end of federal fiscal year
2.2.34.7	Claim Worksheet for NSL,SB, SMP,WMMP, EEN (PI-1409)	Current fiscal year plus 4 years	Public School District GRS	PUBSC620 State and Federal Food Service Program Records - Confidential, FIS + 3 years and destroy confidential / Event is end of federal fiscal year
2.2.34.8	Donated Food Distribution Program Monthly Inventory Records	Current fiscal year plus 4 years	Public School District GRS	PUBSC600 State and Federal Food Service Program Records, FIS + 3 years and destroy / Event is end of federal fiscal year
2.2.34.9	A la Carte, Lunch Breakfast, ½ -Day Kindergarten	Current fiscal year plus 4 years	Public School District GRS	PUBSC600 State and Federal Food Service Program Records, FIS + 3 years and destroy / Event is end of federal fiscal year 63
2.2.34.10	Milk Program Sales Records	Current fiscal year plus 4 years	Public School District GRS	PUBSC600 State and Federal Food Service Program Records, FIS + 3 years and destroy / Event is end of federal fiscal year
2.2.35	Grant Applications – Successful ++	5 years	Administrative Records GRS	ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent
2.2.36	Grant Applications – Unsuccessful	1 year	Administrative Records GRS	ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent

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Food Service Records (continued)

2.2.34.0	Expired School Districts GRS (2010) Food Services Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule *
2.2.37	State Tuition Claim (PI-1524)	1 year after audit	Public School District GRS	PUBSC680 State Tuition Claim Documentation, EVT + 1 year and destroy / Event is date of final audit of claims
2.2.38	Tuition Claim for non- Residents	1 year after audit	Public School District GRS	PUBSC680 State Tuition Claim Documentation, EVT + 1 year and destroy / Event is date of final audit of claims
2.2.39	Summer School (PI-1804) (Electronic)	1 year after audit	Public School District GRS	PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI
2.2.40	Notification to Exceed Revenue Limits (PI-1572-B)	Permanent		Closed 64
2.2.41	Group and Foster Home FTE Log (PI-1589)	5 years	Public School District GRS	PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI
2.2.42	Mentoring Grant for Initial Educators (PI-1640)	7 years	Administrative Records GRS	ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent
2.2.43	Peer Review and Mentoring Grants (PI-1653)	7 years	Administrative Records GRS	ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent

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Food Service Records (continued)

2.2.34.0	Expired School Districts GRS (2010) Food Services Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule *
2.2.44	District Development Levels Aligned to Grades in PI 34.27.29 (PI-1675)	Permanent		Closed
2.2.45	National School Lunch PROV 2 Contract	4 years	Public School District GRS	PUBSC600 State and Federal Food Service Program Records, FIS + 3 years and destroy / Event is end of federal fiscal year
2.2.46	School Food Authority-Civil Rights Compliance Self Evaluation Form—National School Lunch (PI-1441)	4 years	Public School District GRS	PUBSC600 State and Federal Food Service Program Records, FIS + 3 years and destroy / Event is end of federal fiscal year
2.2.47	USDA Commodity Distribution Program Complaint Form (PI-6005)	Filed only when complaint has been received. Keep records for 4 years beyond that.	Public School District GRS	PUBSC620 State and Federal Food Service 65 Program Records - Confidential, FIS + 3 years and destroy confidential / Event is end of federal fiscal year

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PERSONNEL RECORDS – EMPLOYEE RECORDS

3.1.0	Expired School Districts GRS (2010) Employee Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule
3.1.1	Teaching Certificates (Including permits and certifications)	6 years after date of retirement, resignation, or termination.	Human Resources Records GRS	HR000190 Official Personnel File, EVT + 8 years and destroy confidential / Event is termination from state service
3.1.2	Transcript of College Credit	6 years after date of retirement, resignation, or termination.	Human Resources Records GRS	HR000190 Official Personnel File, EVT + 8 years and destroy confidential / Event is termination from state service
3.1.3	Certified Staff Certificates of Previous Experience	6 years after date of retirement, resignation, or termination.	Human Resources Records GRS	HR000013 Recruitment and Selection Related Records, EVT + 4 years and destroy confidential / Event is date of completion of recruitment (or recruitment campaign for group hired) or the date of agency decision to no longer recruit for the position(s)
3.1.4	Evaluation Records	6 years after date of retirement, resignation, or termination	Human Resources Records GRS	HR000013 Recruitment and Selection Related Records, EVT + 4 years and destroy confidential / Event is date of completion of recruitment (or recruitment campaign for group hired) or the date of agency decision to no longer recruit for the position(s)

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Employee Records (continued)

3.1.0	Expired School Districts GRS (2010) Employee Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule
3.1.5	Individual Teaching Contracts	6 years after date of retirement, resignation, or termination.	Human Resources Records GRS	HR000190 Official Personnel File, EVT + 8 years and destroy confidential / Event is termination from state service
3.1.6	Other Individual Employment Contracts	6 years after date of retirement, resignation, or termination.	Human Resources Records GRS	HR000190 Official Personnel File, EVT + 8 years and destroy confidential / Event is termination from state service
3.1.7	Applications (Hired)	6 years after date of retirement, resignation, or termination	Human Resources Records GRS	HR000013 Recruitment and Selection Related Records, EVT + 4 years and destroy confidential / Event is date of completion of recruitment (or recruitment campaign for group hired) or the date of agency decision to no longer recruit for the position(s) ⁶⁷
3.1.8	Applications (Not Hired)	3 years	Human Resources Records GRS	HR000025 Non-Select Letters or Emails, EVT + 1 year and destroy confidential / Event is end of recruitment
3.1.9	Immigration and Nationalization Services INS-9 Forms	3 years from date of hire, or one year after termination, whichever is later	Human Resources Records GRS	HR000026 Federal I-9 Forms, EVT + 3 years after date of hire or 1 year after termination, whichever is longer, per USCIS 13248, and destroy confidential / Event is date of hire or date of termination

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Employee Records (continued)

3.1.0	Expired School Districts GRS (2010) Employee Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule
3.1.10	Staff Accident Reports	5 years after settlement	Risk Management GRS	RISK0010 Worker's Compensation Claims Case Files, EVT + 30 years and destroy confidential / Event is date claim is closed
3.1.10.1	Injury Claims	5 years after settlement	Risk Management GRS	RISK0010 Worker's Compensation Claims Case Files, EVT + 30 years and destroy confidential / Event is date claim is closed
3.1.10.2	Workers Compensation	5 years after settlement	Risk Management GRS	RISK0010 Worker's Compensation Claims Case Files, EVT + 30 years and destroy confidential / Event is date claim is closed
3.1.10.3	Public Liability	5 years after settlement	Risk Management GRS	RISK0010 Worker's Compensation Claims Case Files, EVT + 30 years and destroy 68 confidential / Event is date claim is closed
3.1.10.4	Settlements	7 years after settlement	Risk Management GRS	RISK0010 Worker's Compensation Claims Case Files, EVT + 30 years and destroy confidential / Event is date claim is closed
3.1.11	Medical Records	6 years after date of retirement, resignation, or termination.	Human Resources Records GRS	HR000150 Employment-Related Medical Case Files, EVT + 8 years and destroy confidential / Event is date of separation from employment in job that requires medical exams or maintenance of medical records

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Employee Records (continued)

3.1.0	Expired School Districts GRS (2010) Employee Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule
3.1.11.1	Physical Examinations	6 years after date of retirement, resignation, or termination.	Human Resources Records GRS	HR000150 Employment-Related Medical Case Files, EVT + 8 years and destroy confidential / Event is date of separation from employment in job that requires medical exams or maintenance of medical records
3.1.11.2	TB Tests	6 years after date of retirement, resignation, or termination.	Human Resources Records GRS	HR000150 Employment-Related Medical Case Files, EVT + 8 years and destroy confidential / Event is date of separation from employment in job that requires medical exams or maintenance of medical records 69
3.1.12	Health & Dental Insurance Waivers	3 years after date of retirement, resignation, or termination	Payroll Records GRS	PAY00021 Employee Payroll and Benefit Records, EVT + 8 years and destroy confidential / Event is date of termination of state service
3.1.13	Affirmative Action Files	7 years	Human Resources Records GRS	HR000135 Compliance Reviews of State Agency Affirmative Action (AA) Plans, EVT + 3 years and destroy confidential / Event is date of final report
3.1.14	Arbitration Decisions – Negotiator	7 years	Human Resources Records GRS	HR000109 Arbitration Decisions – Presential, Permanent

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Employee Records (continued)

3.1.0	Expired School Districts GRS (2010) Employee Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule
3.1.15	Athletic Activity Contracts	6 years after date of retirement, resignation, or termination.	Human Resources Records GRS	HR000190 Official Personnel File, EVT + 8 years and destroy confidential / Event is termination from state service
3.1.16	Classification Studies – Description of job duties of individual school district positions.	6 years from creation	Human Resources Records GRS	HR000047 Classification Surveys and Related Documentation, EVT + 6 years and destroy / Event is close of survey or action taken
3.1.17	Disability Insurance Claims – Claims filed by employees for disability insurance program.	6 years after final settlement of claim	Risk Management GRS	RISK0010 Worker’s Compensation Claims Case Files, EVT + 30 years and destroy confidential / Event is date claim is closed
3.1.18	Eligibility Register – List of job applicants who have qualified for positions within district.	3 years after job has been filled	Human Resources Records GRS	HR000013 Recruitment and Selection Related Records, EVT + 4 years and destroy confidential / Event is date of completion of recruitment (or recruitment campaign for group hired) or the date of agency decision to no longer recruit for the position(s)
3.1.19	Employee Deficiency/Termination Reports	6 years after retirement, resignation, or termination	Human Resources Records GRS	HR000112 Employee Discipline Related Records; HR000190 Official Personnel File, EVT + 8 years and destroy confidential / Event is termination from state service

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Employee Records (continued)

3.1.0	Expired School Districts GRS (2010) Employee Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule
3.1.20	Equal Employment Opportunity Reports/Summary Data Reports sent to Federal Government	3 years	Human Resources Records GRS	HR000047 Classification Surveys and Related Documentation, EVT + 6 years and destroy / Event is close of survey or action taken
3.1.21	Fair Labor Standards Act – Salary schedules, employee classification, compensation periods, work schedules/periods	6 years after retirement, resignation, or termination.	Human Resources Records GRS	HR000051 Fair Labor Standards Act (FLSA) Status Requests, EVT + 3 years and destroy confidential / Event is date of termination
3.1.22	Grievance Files – Employee grievances and/or complaints filed under a labor agreement or personnel rules. This also relates to arbitration files and related court cases.	10 years after date of settlement.	Human Resources Records GRS	HR000050 Fair Labor Act (FLSA) Formal and Informal Complaint Files, EVT + 5 years and destroy confidential / Event is date of determination; HR00011 Agency Grievance Case File, EVT + 4 years and destroy / Event is date request is approved or denied
3.1.23	Insurance Certificates and Policies	6 years after expiration	Risk Management GRS	RISK0002 Proposals for Insurance Coverage, EVT + 7 years and destroy / Event is date bid is closed
3.1.24	Insurance Premium Reports	6 years from date of creation	Risk Management GRS	RISK0002 Proposals for Insurance Coverage, EVT + 7 years and destroy / Event is date bid is closed

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Employee Records (continued)

3.1.0	Expired School Districts GRS (2010) Employee Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule
3.1.25	Insurance Working Files	6 years from date of creation	Risk Management GRS	RISK0002 Proposals for Insurance Coverage, EVT + 7 years and destroy / Event is date bid is closed
3.1.26	Labor Union – Contracts	Permanent	Human Resources Records GRS	HR000107 Signed Collective Bargaining Agreements, Permanent
	Contracts between school district and various labor unions including: correspondence, salary schedules, personnel policies.		Human Resources Records GRS	HR000102 Bargaining Unit Master Agreements Case File, EVT + 10 years and transfer to Wisconsin Historical Society / Event is date signed labor agreement is enacted into law or date of labor agreement implementation, whichever is later ⁷²
3.1.27	Labor Union – Disputes	Permanent	Human Resources Records GRS	HR000106 Union Member Grievance Arbitration Case Files, Permanent
3.1.28	Labor Union – Negotiations Minutes	Permanent	Human Resources Records GRS	HR000104 Agency Collective Bargaining and Collective Bargaining Agreement Administration Case File
3.1.29	Non-Union Salary Determination – Annual salary schedules for all non-union employees.	6 years after expiration	Human Resources Records GRS	HR000202 Personnel History Roster, Permanent

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Employee Records (continued)

3.1.0	Expired School Districts GRS (2010) Employee Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule
3.1.30	OSHA – Employee Accident Reports	3 years beyond date of accident	Risk Management GRS	RISK0010 Worker’s Compensation Claims Case Files, EVT + 30 years and destroy confidential / Event is date claim is closed
3.1.31	OSHA – Employee Exposure Records+++ Any information concerning employees exposed to toxic substances or harmful physical agents.	30 years after termination, resignation, or retirement	Human Resources Records GRS	HR000151 Medical Records Involving Employee Exposure to Hazardous Substances, EVT + 30 years and destroy confidential / Event is termination of employment

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Employee Records (continued)

3.1.0	Expired School Districts GRS (2010) Employee Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule
3.1.32	<p>OSHA – Employee Medical Records</p> <p>Any information concerning the health status of an employee which is made or maintained by a physician, nurse, or other health care personnel, or technician, including: medical and employment questionnaires or histories, medical exams, medical opinions, descriptions of treatments and prescriptions, and employee medical complaints.</p>	30 years after termination, resignation, or retirement	Human Resources Records GRS	HR000150 Employment-Related Medical Case Files, EVT + 8 years and destroy confidential / Event is date of separation from employment in job that requires medical exams or maintenance of medical records
3.1.33	Performance of Work Contracts	6 years after action completed	Human Resources Records GRS	HR000190 Official Personnel File, EVT + 8 years and destroy confidential / Event is termination from state service

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Employee Records (continued)

3.1.0	Expired School Districts GRS (2010) Employee Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule
3.1.34	Personnel Files – Individual Containing applications, accident reports, citations, medical records (physical exam certificates, etc.). personal history, employee references, and letters of appointments/promotion, termination/resignation	6 years after date of retirement, resignation, or termination	Human Resources Records GRS	HR000190 Official Personnel File, EVT + 8 years and destroy confidential / Event is termination from state service
3.1.35	Personnel files – Summer School Applications/contracts and miscellaneous correspondence for summer employment.	6 years after date of retirement, resignation, or termination	Human Resources Records GRS	HR000190 Official Personnel File, EVT + 8 years and destroy confidential / Event is termination from state service 75
3.1.36	Personnel and Promotion List	6 years or until superseded	Human Resources Records GRS	HR000190 Official Personnel File, EVT + 8 years and destroy confidential / Event is termination from state service

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Employee Records (continued)

3.1.0	Expired School Districts GRS (2010) Employee Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule
3.1.37	Position Recruitment File – Relating to posting, recruitment, selection, and appointment to each position.	6 years after date of recruitment	Human Resources Records GRS	HR000013 Recruitment and Selection Related Records, EVT + 4 years and destroy confidential / Event is date of completion of recruitment (or recruitment campaign for group hired) or the date of agency decision to no longer recruit for the position(s)
3.1.38	Requisition for Personnel – Request for personnel to fill job vacancies.	Retain until 6 years after job is filled or the requisition is cancelled	Human Resources Records GRS	HR000011 Request to Staff Positions, EVT + 4 years and destroy / Event is date request is approved or denied
3.1.39	Substitute Teacher Reports	3 years from date of hire	Human Resources Records GRS	HR000190 Official Personnel File, EVT + 8 ⁶ years and destroy confidential / Event is termination from state service
3.1.40	Unemployment Claims/Compensation Claims for unemployment	6 years after date of claim	Payroll Records GRS	PAY00025 Unemployment Compensation Records, EVT + 5 years and destroy confidential / Event is date of receipt or response
	Claims for unemployment		Payroll Records GRS	PAY00025 Unemployment Compensation Records, EVT + 5 years and destroy confidential / Event is date of receipt or response
3.1.41	Summons/Pleadings, Other Legal Documents	7 years	Human Resources Records GRS	HR000114 Personnel-Related Litigation Case Files, EVT + 5 years and destroy confidential / Event is date case is closed

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Employee Records (continued)

3.1.0	Expired School Districts GRS (2010) Employee Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule
3.1.42	Notices of Claims	7 years	Risk Management GRS	RISK0010 Worker's Compensation Claims Case Files, EVT + 30 years and destroy confidential / Event is date claim is closed

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STUDENT RECORDS – STUDENT RECORDS

4.1.0	Expired School Districts GRS (2010) Student Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule *
4.1.1	Enrollment or Registration Forms	Date of Withdrawal plus 7 years.	Public School District GRS	PUBSC400 Behavioral Records, EVT + 1 year and destroy confidential / Event is date of creation
4.1.2	Home Language Reports – Civil Rights Information	1 year after student graduates or leaves school system, unless extended by consent.	Public School District GRS	PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI
4.1.3	Listing of Disclosure and Transfer of Student Records	5 years after student graduates or leaves school system.	Public School District GRS	PUBSC400 Behavioral Records, EVT + 1 year and destroy confidential / Event is date of creation
4.1.4	Nonresident Pupil Attendance Application/Agreement	5 years after student graduates or leaves school system.	Public School District GRS	PUBSC340 Full-time Open Enrollment Program Records, EVT + 3 years and destroy confidential / Event is date student application is rejected, the student declines enrollment, or the student is no longer enrolled in the nonresident district, whichever is later

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Student Records (continued)

4.1.0	Expired School Districts GRS (2010) Student Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule *
4.1.5	Athletic Records—Team results, participation, contracts, transportation records, etc.	5 years after student graduates or leaves school system.	Public School District GRS	PUBSC420 Progress Records, EVT + 5 years and destroy confidential / Event is date student graduates or withdraws from district
4.1.6	Accident Reports—Student Originating during school year and on school buildings or grounds.	1 year after student graduates or leaves school system, unless extended by consent.	Public School District GRS	PUBSC400 Behavioral Records, EVT + 1 year and destroy confidential / Event is date of creation
4.1.7	Application for Driver Education Certificates (PI-1715)	1 year		Closed 79
4.1.8	Driver Education Program Application (PI-1709)	7 years	Public School District GRS	PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI
4.1.9	Home Based Education Application (PI-1206)	7 years	Public School District GRS	PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI

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Student Records (continued)

4.1.0	Expired School Districts GRS (2010) Student Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule *
4.1.10	January Pupil Membership Report (PI-1563) September Pupil Membership Report(PI-1563)	7 years	Public School District GRS	PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI
4.1.11	Pupil Count Youth Challenge Academy (PI-1563 YCA)	7 years	Public School District GRS	PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI
4.1.12	Pupil Nondiscrimination and Educational Equity Report (PI-1197-B)	7 years	Public School District GRS	PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified ₈₀ by DPI
4.1.13	Five-Year School Self-Evaluation Summary for Status of Pupil-Nondiscrimination (PI-1198)	7 years	Public School District GRS	PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI
4.1.14	Teacher Grade Books	1 year after entry of grades in cumulative record.	Public School District GRS	PUBSC420 Progress Records, EVT + 5 years and destroy confidential / Event is date student graduates or withdraws from district
4.1.15	Teacher Attendance Records	1 year after entry of grades in cumulative record.	Public School District GRS	PUBSC420 Progress Records, EVT + 5 years and destroy confidential / Event is date student graduates or withdraws from district

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Student Records (continued)

4.1.0	Expired School Districts GRS (2010) Student Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule *
4.1.16	Lesson Plans	Until no longer of administrative value	Administrative Records GRS	ADMIN352 Transitory Records, EVT + 0 years and destroy confidential / Event is date created or received

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STUDENT RECORDS – PROGRESS RECORDS

4.2.0	Expired School Districts GRS (2010) Progress Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule *
4.2.1	Student Progress Records	5 years after student graduates or leaves the school system	Public School District GRS	PUBSC420 Progress Records, EVT + 5 years and destroy confidential / Event is date student graduates or withdraws from district
4.2.1.1	Middle School Record	5 years after student graduates or leaves the school system	Public School District GRS	PUBSC420 Progress Records, EVT + 5 years and destroy confidential / Event is date student graduates or withdraws from district
4.2.1.2	Scholastic School Record	5 years after student graduates or leaves the school system	Public School District GRS	PUBSC420 Progress Records, EVT + 5 years and destroy confidential / Event is date student graduates or withdraws from district
4.2.1.3	Student Grades	5 years after student graduates or leaves the school system	Public School District GRS	PUBSC420 Progress Records, EVT + 5 years and destroy confidential / Event is date student graduates or withdraws from district

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Student Progress Records (continued)

4.2.0	Expired School Districts GRS (2010) Progress Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule *
4.2.1.4	Courses Taken	5 years after student graduates or leaves the school system	Public School District GRS	PUBSC420 Progress Records, EVT + 5 years and destroy confidential / Event is date student graduates or withdraws from district
4.2.1.5	Attendance Record	5 years after student graduates or leaves the school system	Public School District GRS	PUBSC420 Progress Records, EVT + 5 years and destroy confidential / Event is date student graduates or withdraws from district
4.2.1.6	Student's School Extracurricular Activities	Permanent	Public School District GRS	PUBSC420 Progress Records, EVT + 5 years and destroy confidential / Event is date student graduates or withdraws from district 83
4.2.1.7	Degrees/Awards	Permanent	Public School District GRS	PUBSC480 High School Transcripts and Degrees/Awards, Permanent
4.2.1.8	Report Cards	Permanent	Public School District GRS	PUBSC500 4K-8 Report Cards, EVT + 5 years and destroy confidential / Event is date student graduates or withdraws from district
4.2.1.9	High School Transcripts	Permanent	Public School District GRS	PUBSC480 High School Transcripts and Degrees/Awards, Permanent

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Student Progress Records (continued)

4.2.0	Expired School Districts GRS (2010) Progress Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule *
4.2.2	Achievement and Test Results Ability Profile—Report of the results of WKCE and other standardized state and national achievement, mental abilities, and aptitude tests reported by score, percentile rank, etc.	1 year after recording of data in the academic achievement or cumulative record ^{2, i}	Public School District GRS	PUBSC400 Behavioral Records, EVT + 1 year and destroy confidential / Event is date of creation

² **Note:** If testing results are not recorded on the achievement or cumulative record either manually or by affixing labels, the results must be retained permanently for grades 9-12 and until the date of withdrawal plus 7 years for all other grades.

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STUDENT RECORDS – STUDENT HEALTH CARE RECORDS

4.3.0	Expired School Districts GRS (2010) Student Health Care Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule*
4.3.1	a) Student’s Health Care Records— Accurate complete and current data base; past health history, present health status, review of systems, health practices, developmental history and status, family structure, function, and health. b) Health Care Provider Records (Patient Health Records)	1 year after student graduates or leaves school system, unless extended by consent. ³	Public School District GRS	PUBSC460 Patient Health Care Records, EVT + 1 year and destroy confidential / Event is date of creation
4.3.2	Emergency Cards —Card or other form of record providing information on whom to contact in the event of an emergency, accident, or illness to a student	Until superseded or until student ceases enrollment, whichever sooner.	Public School District GRS	PUBSC400 Behavioral Records, EVT + 1 year and destroy confidential / Event is date of creation

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³ Health care records are not considered to be behavioral records—could retain longer and may need to if relates to Medicaid funds/audit. 5-7 years

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Student Health Care Records (continued)

4.3.0	Expired School Districts GRS (2010) Student Health Care Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule*
4.3.3	Exclusion and Verification Documentation —Affidavits or similar documents seeking the exclusion of students from participation in immunization or other health care programs for medical or religious reasons	If data from the verification documentation is recorded on the cumulative health card, the documentation need be retained only as long as administratively valuable.	Public School District GRS	PUBSC400 Behavioral Records, EVT + 1 year and destroy confidential / Event is date of creation
4.3.4	Reports to Enforcement Agencies —copies of reports on child abuse or neglect, communicable disease, dog bites, drug offenses, missing children, or sexually transmitted disease submitted to the Wisconsin Department of Health and Family Services or local law enforcement and animal control agencies.	Retain for two (2) years following submission of report.	Public School District GRS	PUBSC280 Reporting to Enforcement Agencies, EVT + 5 years and destroy confidential / Event is date report is submitted ⁸⁶
4.3.5	Special Health Care Records —Logs or reports of medications or treatment administered to students on a group or individual basis.	Current; If in support of Medicaid claim, 5-7 years.	Public School District GRS	PUBSC460 Patient Health Care Records, EVT + 1 year and destroy confidential / Event is date of creation

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Student Health Care Records (continued)

4.3.0	Expired School Districts GRS (2010) Student Health Care Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule*
4.3.6	Parent’s Requests and Physician’s Authorization for specialized health care.	End of validity of request or authorization plus 2 years.	Public School District GRS	PUBSC460 Patient Health Care Records, EVT + 1 year and destroy confidential / Event is date of creation
4.3.7	Family Educational Rights and Privacy Act (FERPA) Access Policies	Until superseded		Closed
4.3.8	FERPA Records of Access to Information Record of each request to access to and each disclosure of personally identifiable information from the educational records of a student. Documentation of requests from and disclosure to the parent or eligible student, to an official of the district for what the district has determined are legitimate educational interests, to a party with written consent from the parent or eligible student, or to a party seeking directory data. Documentation of requests from and disclosures to any party not included in (a) above.	Retain for two (2) years Permanent retention (per regulation- 34 CFR 99.32(a)(2)) From the parent: Retention until the student is 18.	Public School District GRS	PUBSC300 Records of disclosure of pupil records, EVT + 0 and destroy confidential / Event is date underlying disclosed public record is no longer retained

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STUDENT RECORDS – STUDENT RECORDS

4.4.0	Expired School Districts GRS (2010) Student Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule *
4.4.0	Protest of Record Statements —Statements by parents or eligible students commenting on contested information in a student record, or stating why they disagree with a district’s decision not to amend a record, or both.	Retain for as long as the record containing the contested information is maintained.	Public School District GRS	PUBSC320 Protest of Record Statements, EVT + 0 years and destroy confidential / Event is date underlying contested public record is no longer retained
4.4.1	Custody Documents — <i>It is an exception to the retention period given that a court order superseded by a subsequent order (e.g., a change in guardianship) need be retained only as long as administratively valuable.</i>	Until student is 18 years of age.	Public School District GRS	PUBSC380 Custody Documents, EVT + 1 and ⁸⁸ destroy confidential / Event is date student graduates or withdraws from district or date superseded by a subsequent order
4.4.3	Psychological Test Results, Central Office	1 year after student graduates or leaves school system unless extended by consent.	Public School District GRS	PUBSC400 Behavioral Records, EVT + 1 year and destroy confidential / Event is date of creation

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Student Records (continued)

4.4.0	Expired School Districts GRS (2010) Student Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule *
4.4.4	Individual Student Disciplinary File	1 year after student graduates or leaves school system unless extended by consent.	Public School District GRS	PUBSC400 Behavioral Records, EVT + 1 year and destroy confidential / Event is date of creation
4.4.5	Student Expulsion Report	1 years after student graduates or leaves school system unless extended by consent or expunged.	Public School District GRS	PUBSC410 Student Expulsion Order, EVT + 0 and destroy confidential / Event is date the order is no longer in effect
4.4.6	Student Suspension Report	1 year after student graduates or leaves school system unless extended by consent.	Public School District GRS	PUBSC400 Behavioral Records, EVT + 1 year and destroy confidential / Event is date of creation

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Student Records (continued)

4.4.0	Expired School Districts GRS (2010) Student Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule *
4.4.7	Assault Against Staff Report	1 year after student graduates or leaves school system unless extended by consent.	Public School District GRS	PUBSC400 Behavioral Records, EVT + 1 year and destroy confidential / Event is date of creation

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STUDENT RECORDS – SPECIAL EDUCATION

INDIVIDUAL STUDENT RECORDS

4.5.0 Special Education Individual Student Records—Records with all personally identifiable information redacted are not individual student records and may be maintained for program evaluation and compliance as specified in Section 5.0 of the schedule.

4.5.0	Expired School Districts GRS (2010) Special Education Individual Student Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule *
4.5.1	Evaluation Records	1 year after student graduates or leaves school system unless extended by consent.	Public School District GRS	PUBSC440 Individuals with Disabilities Education Act (IDEA) Records, EVT + 1 year and destroy confidential / Event is date student graduates or withdraws from district ⁹¹
4.5.2	Individual Education Program (IEP)	1 year after student graduates or leaves school system unless extended by consent.	Public School District GRS	PUBSC440 Individuals with Disabilities Education Act (IDEA) Records, EVT + 1 year and destroy confidential / Event is date student graduates or withdraws from district

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SPECIAL EDUCATION RECORDS – SPECIAL EDUCATION RECORDS

5.1.0	Expired School Districts GRS (2010) Special Education Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule *
5.1.1	Special Education Plan/Claim (PI-2199 or equivalent)	4 years after end of project year	Administrative Records GRS	ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent
5.1.2	IDEA Application/Plan (PI-2111)	4 years after end of project year	Administrative Records GRS	ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent
5.1.2.1	Flow-Through Funds	4 years after end of project year	Administrative Records GRS	ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent ⁹²
5.1.2.2	Discretionary Funds	4 years after end of project year	Administrative Records GRS	ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent
5.1.2.3	Local Educational Agency Transfer Funds	4 years after end of project year	Administrative Records GRS	ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent
5.1.2.4	Preschool Entitlement Funds	4 years after end of project year	Administrative Records GRS	ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent

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Special Education Records (continued)

5.1.0	Expired School Districts GRS (2010) Special Education Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule *
5.1.2.5	Preschool Discretionary Funds	4 years after end of project year	Administrative Records GRS	ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent
5.1.3	IDEA Federal Student Data Report (PI-2197)	4 years after end of project year	Public School District GRS	PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI
5.1.4	Registration of Blind Students (PI-2015)	4 years after end of project year	Public School District GRS	PUBSC400 Behavioral Records, EVT + 1 year and destroy confidential / Event is date of creation
5.1.5	National Instructional Materials Access Center and Accessibility Standard Statement of Assurance (PI-2194)	4 years after end of project year	Administrative Records GRS	ADMIN406 Grants, EVT + 4 years and 93 destroy confidential / Event is date of final report or denial is received/sent
5.1.5	School District Plan, Part A Exceptional Needs	4 years after end of project year	Administrative Records GRS	ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent

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SPECIAL EDUCATION RECORDS - OTHER STUDENT RECORDS

5.2.0	Expired School Districts GRS (2010) Special Education Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule *
5.2.1	Full-Time Open Enrollment Program Notice of Assignment and Notice of Intent to Attend (PI-9415)	5 years	Public School District GRS	PUBSC340 Full-time Open Enrollment Program Records, EVT + 3 years and destroy confidential / Event is date student application is rejected, the student declines enrollment, or the student is no longer enrolled in the nonresident district, whichever is later
5.2.2	Nonresidential School District Approval or Denial of Open Enrollment Application (PI-9416)	5 years	Public School District GRS	PUBSC340 Full-time Open Enrollment Program Records, EVT + 3 years and destroy confidential / Event is date student application is rejected, the student declines enrollment, or the student is no longer enrolled in the nonresident district, whichever is later
5.2.3	Resident School District Approval or Denial of Open Enrollment Application (PI-9417)	5 years	Public School District GRS	PUBSC340 Full-time Open Enrollment Program Records, EVT + 3 years and destroy confidential / Event is date student application is rejected, the student declines enrollment, or the student is no longer enrolled in the nonresident district, whichever is later

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Special Education Records (continued)

5.2.0	Expired School Districts GRS (2010) Special Education Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule *
5.2.4	Appeal of School District Denial of Open Enrollment (PI-9418)	5 years	Public School District GRS	PUBSC340 Full-time Open Enrollment Program Records, EVT + 3 years and destroy confidential / Event is date student application is rejected, the student declines enrollment, or the student is no longer enrolled in the nonresident district, whichever is later
5.2.5	Request for Tuition Waiver Due to Move— (PI-9419-A)	5 years	Public School District GRS	PUBSC700 Tuition Waiver Records, EVT + 3 years and destroy confidential / Event is date waiver is approved
5.2.6	Request for Tuition Waiver Due to Move — (PI-9419-B)	5 years	Public School District GRS	PUBSC700 Tuition Waiver Records, EVT + 3 years and destroy confidential / Event is date waiver is approved ⁹⁵
5.2.7	Request for Tuition Waiver Due to Move (Spanish Version) (PI-9419-B Spanish)	5 years	Public School District GRS	PUBSC700 Tuition Waiver Records, EVT + 3 years and destroy confidential / Event is date waiver is approved

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Special Education Records (continued)

5.2.0	Expired School Districts GRS (2010) Special Education Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule *
5.2.8	Public School Open Enrollment Approval/Denial Summary (PI-9420)	5 years	Public School District GRS	PUBSC340 Full-time Open Enrollment Program Records, EVT + 3 years and destroy confidential / Event is date student application is rejected, the student declines enrollment, or the student is no longer enrolled in the nonresident district, whichever is later
5.2.9	Alternative Education Program Grant Application (PI-9710)	4 years after end of project year	Administrative Records GRS	ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent
5.2.10	Disproportionality Application (PI-8801)	4 years after end of project year	Administrative Records GRS	ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent
5.2.11	State AODA Grants: AODA Program Interim Report (PI-7101/PI-7102)	4 years after end of project year	Administrative Records GRS	ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent
5.2.12	Transfer of Service Exemption Request – Special Education (PI-5001-A)	4 years after end of project year	Public School District GRS	PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI

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Special Education Records (continued)

5.2.0	Expired School Districts GRS (2010) Special Education Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule *
5.2.13	SAGE Year End Report & Contract Update (PI-SAGE-1-EOY)	1 year	Public School District GRS	PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI
5.2.14	SAGE State Aid Entitlement (PI-SAGE-ENT)	1 year	Public School District GRS	PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI
5.2.15	SAGE Performance Objectives (PI-SAGE-1-O)	4 years after end of project year	Public School District GRS	PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI
5.2.16	School Performance Report (PI-SPR)	15 years	Public School District GRS	PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI
5.2.17	High-Cost Special Education Initiative Claim Form (Pi-1570)	4 years after end of project year	Administrative Records GRS	ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent

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Special Education Records (continued)

5.2.0	Expired School Districts GRS (2010) Special Education Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule *
5.2.18	Special Education Procedural Compliance Self-Assessment Report and Corrective Action Plan (PI-3202)	4 years after end of project year	Public School District GRS	PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI
5.2.19	Application to Offer GED Option #2 (PI-8201)	Permanent	Administrative Records GRS	ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent
5.2.20	District Waiver for One percent Cap—WI Alternate Assessment (WAA) – Students with Disabilities	4 years after the end of the project	Public School District GRS	PUBSC260 Reporting to the Department of Public Instruction, EVT + 5 years and destroy confidential / Event is date report is certified by DPI
5.2.21	Local Use Form; Homeless Student Identification (PI-Q03-8)	4 years after end of project year	Administrative Records GRS	ADMIN406 Grants, EVT + 4 years and destroy confidential / Event is date of final report or denial is received/sent

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MISCELLANEOUS RECORDS

6.1.0	Expired School Districts GRS (2010) Miscellaneous Records	Retention Period*	Superseded General Records Schedule	Current WI Public School District GRS (2023) Recommended Retention Schedule
6.1.1	School Newspapers	Permanent	Public School District GRS	PUBSC200 Historical Materials and Artifacts, Permanent
6.1.2	School Yearbooks	Permanent	Public School District GRS	PUBSC200 Historical Materials and Artifacts, Permanent

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Record Retention Title	Descripton	PII	Confidential	Minimum Retention	Notes
IT Surveillance Video	<p>Records include any surveillance video that is captured of students, or staff on the district video surveillance system(s).</p> <p>Any information that can identify someone is considered PII.</p>	Yes	No	Surveillance video is retained for 30 days and then overwritten.	<p>According to FERPA, a photo, or video is considered part of a student's education record when the photo or video is directly related to the student.</p> <p>Below are factors that would help determine if a photo or video is directly related to a student.</p> <ul style="list-style-type: none"> -The photo or video is used for disciplinary action involving a student, shows a student in violation of local, state, or federal law, or shows a student being attacked, victimized, or ill. -The student is the specific focus of a photo, or video. -The photo, or video contains personally identifiable information contained in a student's record.

Proposed Code #	Proposed Title	Current policy code	WASB recommendation	WASB Comment (if any)	Administration Recommendation:
810	School-Community Relations Goals	810	Keep current policy	The PRG does not provide a sample covering this content. The policy is acceptable as written	Agree w/ WASB including edits
811	Community Involvement in Decisionmaking	811	Keep current policy	The PRG provides a sample parent involvement policy at PRG 811.1, but does not provide a sample community involvement policy. There is no legal requirement for a community involvement policy. Your policy is acceptable as written.	Agree w/ WASB
821.1	Use of Students in Public Information Program	821.1	Keep current policy, but see note	The PRG does not provide a sample covering this content. The policy is generally acceptable, but note that that recorded communications under this policy that use students or capture student images may be pupil records and that use of such recorded communications should be consistent with pupil records laws and district pupil records policies. You might add a statement to the policy to that effect - such a statement is not required but might be a good reminder.	Agree w/WASB including edits & stmt
822	News Media Relations	822	Keep current policy	The PRG does not provide a sample covering this content. The policy is acceptable as written	Agree w/ WASB
823	Access to public records	823	Replace with PRG 823 Policy 1	Your district has adopted PRG 823 sample policy 1. Since adopting that policy, there have been substantive updates. I incorporated relevant provisions from your current policy into the draft.	Agree w/ WASB including edits
823 E	Public Records Notice and Fee Schedule	823 E	Replace with PRG 823 Exhibit 1	Your district has adopted PRG 823 sample Exhibit 1. There were substantive updates since your adoption of the exhibit. I transferred the information from your current exhibit to the draft. You should review the fee schedule to make sure the fees reflect your actual costs.	Agree w/WASB & edits

823 R	General Procedures for Handling Public Records Requests	823 R	Replace with PRG 823 Rule 1	Your district has adopted PRG 823 sample rule 1. There were substantive updates since your adoption of the rule. The draft exhibit includes the fee schedule, so I chose the option of cross referencing the fee schedule to the exhibit.	Agree w/ WASB
830	Community use of School Facilities	830	Keep current policy	The PRG does not provide a sample covering this content. The policy is acceptable as written.	Agree w/ WASB including edits
830 R	Use of Facilities Regulations	830 R	Keep current rule, consider review with legal counsel.	The PRG does not provide a sample covering this content. The rule is generally acceptable as written, but you should consider reviewing the rule with legal counsel with regard to policy choices such as not requiring users of the pool to provide certificates of insurance.	Agree w/WASB including edits
830 E	Facility Use Rental Fee Exemption Request	830 E	Keep current exhibit	The PRG does not provide a sample covering this content. The exhibit is acceptable as written.	Agree w/WASB including edits
831	Resrictions on Tobacco, Nicotine and Vapor Products	831	Keep current policy	Your board adopted the current PRG 831 sample policy 3.	Agree with WASB
831.1	Out of Season Athletic Clinics/Leauges	831.1	Keep current policy	The PRG does not provide a sample covering this content. The policy is acceptable as written.	Agree w/ WASB including edits
832	Weapons on School Premises	832	Keep current policy	Your board adopted the current PRG 832 sample policy 2.	Agree w/ WASB
832.1	Public Conduct on School Property	832.1	Keep current policy, consider making this a rule under 860.	This policy provides specific rules of conduct for visitors to school property. It would work as a rule under Policy 860 Visitors to Schools.	Agree w/ WASB change to 806 Rule 2
833	Facility Use - Pet Restriction	833	Keep current policy	The PRG does not provide a sample covering this content. The policy is acceptable as written. You should include 383.1 Service Animals in the School as a cross reference.	Agree w/ WASB including edits

833 E	Facility Use - Pet Restriction	833 E	Keep current policy	The PRG does not provide a sample covering this content. The policy is acceptable as written. You should include 383.1 Service Animals in the School as a cross reference.	Agree w/ WASB including edits
840	Public Gifts to the Schools	840	Replace with PRG 840 sample policy 2	Note that your current policy requires board approval of all gifts. That is a choice your board may make. The proposed draft delegates approval of some small gifts to administration - this can be changed to require board approval of all gifts if that is what your board wants.	Agree w/ WASB
850	Sales and Solicitations on School Property	850	Replace with PRG 850 sample policy 1		Agree w/ WASB including edits
851	Advertising in the Schols	851	Keep current policy	The PRG does not provide a sample covering this content. The policy is acceptable as written. Note that the second to last bullet point under #10 should be reviewed and edited for clarity (not sure why "(Option)" is included in the policy.	Agree w/ WASB including edits
851 R	Sales/Advertising - Exceptions	851 R	Keep current rule	The PRG does not provide a sample covering this content. The rule is acceptable as written.	Agree w/ WASB including edits
860	Vistors to the Schools During the School Day	860	Replace with PRG 860 sample policy 1		Agree w/ WASB including edits
860 R	Visitors to the Schools Procedures	860 R	Replace with PRG 860 sample rule 1		Agree w/ WASB including edits
862	Seating at Public Events	862	Keep current policy	The PRG does not provide a sample covering this content. The policy is acceptable as written.	Agree w/ WASB including edits

SCHOOL-COMMUNITY RELATIONS GOALS

810

The best interests of the Waunakee Community Schools are served when lay citizens and professional school personnel work together for school improvement. Residents of the District are encouraged to express their desires for the quality of education they wish to have in their schools.

One of the Board of Education's primary functions is to channel citizens' aspirations for their schools to the professional staff. To facilitate such channeling, the Board will support appropriate devices, arrangements, procedures and organizations. The Board, therefore, reaffirms and declares its intent as follows:

- To keep the citizens of the District regularly and thoroughly informed through various channels of communication on the policies, program, problems, and planning of the school system, and to carry out this policy through its own efforts and the office of the superintendent of schools.
- To invite the advice and counsel of the people of the District at all times and especially at all regularly scheduled Board meetings.
- To solicit the sound thinking and skills of the people through advisory committees selected from the community and appointed by the Board to consider those problems which vitally affect the future of the District's children.

Cross Ref.: 187, Public Participation at Board Meetings
811, Community Involvement in Decision Making
822, News Media Relations
823, Access to Public Records

Adopted: 2/14/83

Revised: March 1994
July 2002
XXX, 2024

Waunakee Community School District

COMMUNITY INVOLVEMENT IN DECISION-MAKING

The Board of Education realizes that the schools belong to the people and that it is the people whom they are created to serve. It, therefore, intends that all reasonable efforts should be exerted to identify the desires of the community and to be responsive, through its actions, to those desires. The two major ways in which the will of the community shall influence the development of Board policies are:

- 1) Board members shall remain mindful that they are elected to represent the people of the District.
- 2) All citizens of the District shall be encouraged to express ideas, concerns, and judgments about the schools through such means as written suggestions or proposals, presentations at hearings, responses to surveys made through interviews, written instruments or other means, comments at meetings of the Board, and service on citizen's advisory committees.

Cross Ref.: 186, Advisory Committees to the Board
187, Public Participation at Board Meetings

Adopted: 5/10/82

Revised: March 1994
July 2002

Waunakee Community School District

Policies of the Board of Education

Series 800: School-Community Relations

USE OF STUDENTS IN PUBLIC INFORMATION PROGRAM

821.1

The participation of students in interpreting the educational program of the schools to the community shall be encouraged, with the understanding that

Students shall not be exploited for the benefit of any individual or group.

Students shall participate only in appropriate situations.

The use of students shall always be evaluated in terms of the effect on the student.

Students shall not solicit or promote District issues without approval of the superintendent's office.

Student images maybe a public record and the use of such recorded communications should be consistent with pupil records laws and district pupil records policies.

The best possible community relations grow from a superior teaching job in the classroom. Enthusiastic students with serious intentions, well directed by sympathetic and capable teachers, are certain to communicate with the parents/guardians and the community

Adopted: 2/14/83

Revised: March 1994

Waukegan Community School District

Policies of the Board of Education

Series 800: School-Community Relations

NEWS MEDIA RELATIONS

822

The Board of Education encourages a policy of sound relations with the press and other communication media in the community and surrounding geographical area.

Therefore, information concerning the Waunakee Community School District and its operation is public information. The news media represents the public interest in reporting information concerning the schools. It is, therefore, in the interest of both the education community and the citizen-taxpayers of the District that there be open communications with news media.

However, in the interest of protecting the rights of individual students, employees are not to discuss individual students or families with the media unless the parent/guardian or a student of the age of majority signs a release.

In order to minimize interruptions in the school day, all requests by representatives of the media to speak to students or staff on school property or during the school day are to be referred to the building principal for approval. Generally, the building principal is to represent the school's position with the media on building issues.

Media requests regarding district-wide issues or disturbances, disruptions, or emergencies should be directed to the superintendent. Natural disasters, fires, strikes, sit-ins, bomb threats, etc. are examples of the issues that should be directed to the superintendent.

The superintendent may authorize other personnel to speak for the District.

Cross. Ref.: 188, News Media at Board Meetings
347, Rules, Student Record Procedures

Adopted: 2/14/83

Revised: 1/15/90
March 1994
July 2002

Waunakee Community School District

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{This sample policy (1) designates a primary legal custodian of records and one or more deputies to the primary custodian; (2) attempts to clarify the respective roles of individual board members and the legal custodian of records in connection with any records of the board member's individual office; (3) assigns duties and responsibilities to the records custodian and others; and (4) identifies the district's "local public offices" for purposes of the public records law. In terms of fees charged to requesters, this sample policy specifies that the board will approve a schedule of authorized fees and also permits the records custodian to reduce or waive applicable fees where the custodian determines that such a waiver or reduction is in the public interest.}

The various records authorities of the _____ Waunakee Community School District shall maintain and provide access to public records in accordance with applicable laws and the policies and procedures of the District. In addition, all officials, employees, and authorized agents of the District shall, to the extent appropriate to the particular record, safeguard the confidentiality of personally-identifiable information in their possession and in the records created or maintained by any school District authority.

The District's public records notice, as adopted by the Board, shall be prominently posted in the District's buildings. The notice shall also promptly be made available to any member of the public for inspection and copying. *{insert if desired: "For additional convenience, and the notice may also be posted on the District's website."}*

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Legal Custodian of the Records of School District Authorities

The *{insert position title(s): "District Administrator"}* shall serve as the legal custodian of records for the following District records authorities: *{Editor's Note: State law permits the board to designate one or more positions as a legal custodian of records. As further covered below, this sample also designates deputy custodians who have authority to act as a legal custodian under certain conditions.}*

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1. The District, including the School Board as the governing body;
2. All committees which are subunits of the Board;
3. Other District records authorities created by law or by rule or order;
4. The individual members of the School Board, including the individual officers of the Board (i.e., President, Vice President, Clerk, Treasurer, *{include "Secretary" if the district is a unified school district}*). However:
 - a. Each Board member remains a records authority and co-custodian of the records of their individual public office.
 - b. As to any records of his/her office that a Board member may create or maintain solely at any location or on any computer system that is not owned or controlled by the District, the Board member shall have responsibility for the proper maintenance and retention of such records.
 - c. Board members and officers shall cooperate with the Board-designated custodian of records in responding to public records requests encompassing records of their individual office, except that an individual board member may take sole responsibility for responding to a request if all of the following apply: (1) the Board member (and not the

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Board-designated custodian of records) has individually received a request for records in the Board member's capacity as an individual records authority; (2) the Board member assumes all legal responsibility for responding to the request; and (3) the request deals exclusively with records of such Board member's office that are in the possession or control of the Board member and that are **not** otherwise available to the Board-designated custodian. **Editor's Note: This provision addresses issues that present significant questions of legal interpretation and that have significant implications for local practices. The district may wish to seek legal advice regarding the handling of records (and requests for records) that are in the possession and control of individual board members.**

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The Executive Director of Operations ~~(identify the position(s) held by the deputy(ies))~~ shall serve as a deputy custodian of records in the event that the primary custodian is absent or otherwise requires assistance in responding to requests for records. In addition, each principal employed by the District shall serve as a deputy custodian concerning the education records of the students presently attending school in their building(s) or programs, as well as those student records which are otherwise maintained at their respective building(s). The legal custodian may designate one or more additional deputies as needed.

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The legal custodian of records is vested with full legal power to render decisions and carry out the duties of each school District records authority designated above, as such duties are identified under the Wisconsin Public Records Law. For example, the legal custodian shall:

1. Receive, evaluate, and respond to requests to inspect or copy records;
2. Compel the prompt assistance of other District employees in responding to requests for access to public records, to the extent the custodian deems necessary;
3. Take an active role, either personally or via a designee or via written procedures, in supervising the proper maintenance and retention of records by District employees; and
4. Ensure that all employees who are entrusted with the records that are subject to the legal custodian's supervision are notified of the identity of the legal custodian and provided with a description of the legal custodian's duties under applicable law.

The District Administrator, or his/her designee, working in conjunction with the individual school official who has been assigned specific responsibility for ensuring the confidentiality of all personally-identifiable data, information, and records collected or maintained by the District under the Individuals with Disabilities Education Act (IDEA), shall (1) develop rules of conduct for District employees who are involved in collecting, maintaining, using, providing access to, sharing or archiving personally-identifiable information; and (2) ensure that all such employees know their duties and responsibilities relating to protecting personal privacy, including applicable state and federal laws.

Neither the designation of a legal custodian of records nor any other provision of this policy shall be interpreted to affect the powers and duties of any District records authority under the Public Records Law.

Authorized Fees under the Public Records Law

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Fees may be charged for costs associated with locating and/or copying requested records and for related postage/shipping costs in accordance with the fee schedule adopted by the Board. The fee schedule shall be included in the District's posted public records notice.

The legal custodian of records may provide copies of a record without charge or at a reduced charge where the custodian determines that a waiver or reduction of the fee is in the public interest. These situations include, but are not necessarily limited to, situations where the records custodian determines that the costs the District would be likely to incur in processing a payment would be likely to exceed the amount of the payment itself; or where the requester is an elected official, the records in question are reasonably necessary for the proper performance of official duties, and the location costs associated with the request are negligible. The legal custodian shall apply any such waiver or reduction of fees with reasonable uniformity and without discrimination as to any status protected by law (e.g., race, sex, disability, etc.). ***{Editor's Note: This paragraph authorizing fee waivers is optional and could be deleted. However, most districts prefer to grant the custodian of records discretion to waive/reduce fees. Waiver/reduction of fees "in the public interest" is expressly permitted under the Public Records Law.}***

In a situation where any fees differing from the fees approved by the Board are established by law, or are authorized to be established by law, those other fees may be charged.

Assistance from Legal Counsel

When the legal custodian of records, or a deputy custodian in the absence of the legal custodian, determines that it is necessary or prudent to do so, he/she is authorized to seek specific legal advice from and engage the assistance of District legal counsel. ***{Insert if desired: In the event that District legal counsel is contacted for representation in connection with a records request, the individual making such contact shall ensure that the Board President is promptly notified of the expected scope of such legal representation if it will extend beyond a brief initial consultation.}***

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Local Public Offices

{Editor's Note: As an alternative to listing the district's local public offices in this policy, the text of this section could be replaced with the following brief statement: "The offices and positions that are considered "local public offices" for purposes of the Wisconsin Public Records Law are listed in the District's posted public records notice."}

Several positions within the district constitute local public offices for purposes of the Wisconsin Public Records Law, including the following positions:

1. Seats held by individual Board members
2. Officers of the School Board
3. District Administrator
4. ~~Elementary School Principal, if applicable,~~
- 4-5. ~~Intermediate School Principal~~
- 5-6. ~~Middle School Principal, if applicable,~~
6. ~~High School Principal, if applicable,~~

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- 7. ~~[The Director of Business Services, if applicable]~~
- 8. ~~Identify any other positions within the District that are deemed to be local public offices. Executive Director of Operations.~~

~~*(Editor's Note: If the board chooses to maintain the above list of the district's "local public offices" directly in this policy (compare the alternative language offered in the note at the beginning of this section), the board must ensure that the list is kept current and that the list of local public offices identified in the district's posted public records notice is consistent with this list.)*~~

Records Management and Retention

~~*(Editor's Note: This section is optional within this policy and could be deleted. The WASB recommends that school boards adopt a separate and more comprehensive policy on the topic of records management and retention, such as a policy based on PRG 823.1 Sample Policy 1. If a district does not follow the recommendation to adopt a separate policy, then the district should consider replacing the short statement below with the entirety of Section III ("Adoption of General Records Schedules and State-Level Approval of other Records Disposition Authority") and Section IV ("Records Retention and Disposition") from PRG 823.1 Sample Policy 1.)*~~

All officers, officials, employees, and other agents of the District are expected to adhere to applicable laws and District policies relating to the management of District records. The records of the District and of any District records authorities shall be retained and disposed of consistent with applicable laws and District policies, including any records retention schedule(s) or other records disposition authority that the District has formally adopted through the authority and procedures of the Wisconsin Public Records Board.

Legal References:

Wisconsin Statutes

- [Sections 19.21 – 19.39](#) [Public Records Law and related statutes]
- [Section 19.65](#) [rules of conduct and training for employees involved in management of personally identifiable information]
- [Section 19.70](#) [rights of data subjects to challenge records]
- [Section 118.125](#) [state pupil records law]
- [Section 120.13\(28\)](#) [board authority to designate legal custodians]

Federal Laws

- [34 C.F.R. Part 99](#) [regulations implementing the Family Educational Rights and Privacy Act (FERPA)]
- [34 C.F.R. §300.623](#) [confidentiality safeguards regarding IDEA-related records]

Cross References:

WASB PRG 823 Sample Policy 1

¹ You can delete this section if your board adopts the draft 823.1 Records Management and Retention that I sent to you with the 700 series policies.

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Adoption Date: 2/14/2022

Revised: _____

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ACCESS TO PUBLIC RECORDS: PUBLIC RECORDS NOTICE AND FEE SCHEDULE

823-Exhibit

Waunakee Community School District

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(This sample exhibit includes the public records notice information required by law and includes a non-mandatory paragraph re-directing parents and guardians seeking their own child's student records to the appropriate school official. Each school district is required to adopt a public records notice and to prominently display the notice and make it available for copying at each of its buildings. This sample exhibit has been drafted to coordinate with PRG 133 Sample Policy 1, and portions of the sample would need to be modified to address other policy approaches to public records issues.)

IMPORTANT: As written, this sample assumes that the school board will formally approve/adopt this notice by a vote. Having the board vote to approve the notice permits the related policy and procedures to cross-reference (rather than repeat) the list of local public offices and the detailed fee provisions that must be included in the notice per statute.

PUBLIC RECORDS NOTICE AND FEE SCHEDULE

~~Insert name of school district~~ **Waunakee Community School District**

The _____ Waunakee Community School District is a choose district type: "common," "unified," or "union high school" common public school district providing instructional programs and education-related services and activities for early childhood students and students in grades 4K through 12. The School Board, consisting of three, five, seven, nine, or eleven seven members, is the governing body of the District. Individual members of the School Board are elected or appointed to their office per state statutes.

The District's schools are comprised of the following:

- ~~Identify the number of elementary schools, or list the elementary schools by school name and street address.~~
- ~~Identify the number of intermediate and/or middle schools, or list the intermediate and/or middle schools by school name and street address.~~
- ~~Identify the number of high schools, or list the high schools by school name and street address.~~
- ~~Identify the number of charter schools which are instrumentalities of the District, or list such charter schools by school name and street address.~~
1. Identify any special schools/programs not addressed within this list, above:
Arboretum Elementary School, 1350 Arboretum Dr., Waunakee, WI 53597
Heritage Elementary School, 501 South St, 6271 Woodland Dr., Waunakee, WI 53597
Prairie Elementary School, 700 N. Madison St., Waunakee, WI 53597
2. Waunakee Intermediate School, 6273 Woodland Dr., Waunakee, WI 53597
Waunakee Community Middle School, 1001 South St., Waunakee, WI 53597
3. Waunakee Community High School, 301 Community Dr., Waunakee, WI 53597
- 5.

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Waunakee Community School District

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The main administrative office of the District is located at:

1. 905 Bethel Circle, Waunakee, WI 53597 Administratively, the District is organized into the following Departments:

1. ~~List administrative department(s), if applicable; or replace this listing of administrative departments with a statement that says "The main administrative office of the District is located at [insert street address]"~~
2. —
3. 1.

Several positions within the District constitute local public offices for purposes of the Wisconsin Public Records Law, including the following positions:

1. Seats held by individual board members
2. Officers of the School Board
3. District Administrator
4. ~~Elementary School Principal, if applicable,~~
- 4.5. Intermediate School Principal
- 5-6. ~~Middle School Principal, if applicable,~~
- 6-7. ~~High School Principal, if applicable,~~
- 7-8. ~~The Director of Business Services, if applicable,~~ Associate Principals
- 8-9. ~~Identify other positions within the District that are identified as local public offices.~~ Executive Director of Operations

The ~~insert position title(s): "District Administrator"~~ serves as the legal custodian of records for the following District authorities:

1. The District, including the School Board as the governing body;
2. All committees which are subunits of the Board;
3. Other District records authorities created by law or by rule or order;
4. The individual members of the School Board, including the individual officers of the Board (i.e., President, Vice President, Clerk, Treasurer, ~~include "Secretary", if the district is a unified school district~~), subject to certain shared responsibilities for records of a Board member's individual office that a Board member may create or maintain solely at any location or on any computer system that is not owned or controlled by the District.

The ~~identify the position(s) held by the deputy (ies)~~ Executive Director or Operations shall serve as a deputy custodian of records in the event that the primary legal custodian is absent or otherwise requires assistance in responding to requests for records. In addition, each building principal employed by the District shall serve as a deputy custodian concerning the education

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ACCESS TO PUBLIC RECORDS: PUBLIC RECORDS NOTICE AND FEE SCHEDULE

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Waunakee Community School District

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records of the students presently attending school in their building(s) or programs, as well as those student records which are otherwise maintained at their respective building(s).

Members of the public may request access to the public records that are under the supervision of the legal custodian by submitting a request to the records custodian during the regular business hours of the District's main Administrative Office, which are Monday through Friday ~~from~~ identify the appropriate office hours – e.g., 7:30 a.m. to 4:30 p.m.] during the regular business hours, except for holidays, emergency closures, and such other exceptions as may be established in connection with the school calendar. Such requests may be made to:

Waunakee Community School District
Custodian of Public Records
905 Bethel Circle
Waunakee, WI 53597 _____ School District
Custodian of Public Records
{Address Line 1}
{Address Line 2}
{City, State and Zip Code}

All requests must be reasonably specific as to the subject matter and time period of the records covered by the request.

All requests will be processed as soon as practicable and without delay. The time it takes the custodian to respond to the request will depend on factors including the nature and extent of the request and the availability of staff and other resources necessary to process the request.

FEE SCHEDULE APPLICABLE TO REQUESTS FOR ACCESS TO PUBLIC RECORDS¹

The following fees are authorized to be charged to persons who request to inspect or copy the records of a District authority, to the extent such request is submitted, or responded to, under the Wisconsin Public Records Law:

Editor's Note: The remainder of this section presents one possible approach to implementing a district's authority to charge fees. Each district will have to determine the extent to which, for example, a per-page fee that is charged for making copies of records includes applicable staff time, or if staff time charges will be separate from the per-page copy rate or the cost of the physical medium that is used. The fee schedule example listed below lists them as separate charges.

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1. Hard Copies of Records:

- Black and White - ~~[\$0.03, or other per-page amount]~~ \$0.05 per side of a page for each paper copy that is made of any standard-size paper record or for any standard-sized

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¹ The fees should reflect your actual cost. I inserted the costs from your February 2022 exhibit, but your costs likely changed since then.

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printed copy of an electronic record, **plus** any applicable costs of staff time as referenced below.

- Color – ~~[\$0.06, or other per page amount]~~ \$0.10 per side of a page for each paper copy that is made of any standard-size paper record or for any standard-sized printed copy of an electronic record, **plus** any applicable costs of staff time as referenced below.

Editor's Note: The per page costs that should be inserted into the provisions above should reflect the actual cost to the district of producing a paper copy of a record that does NOT include the cost of the staff time needed to make the paper copies.

2. Electronic Copies of Records (includes any electronic records provided by email, PDF, DVD, flash drive, or other electronic format):

- The cost of the physical medium used will be charged when copying records already in a digital format onto a physical medium, as well as any applicable costs of staff time as referenced below.

~~DVD (each) – \$15, (4.7 GB)~~

~~Flash drive (each) – \$5.00 (8GB)~~

~~[\$6.50 (16 GB)] [List the physical mediums used by the district for copying electronic records and the actual cost of the physical medium to the district and charged to the person requesting the copy of the record(s). For example:~~

~~– DVD (each) – [insert actual cost to the district, e.g., \$0.50] (4.7 GB)~~

~~– Flash drive (each) –~~

~~[insert actual cost to the district, e.g., \$3.00] (8GB)~~

~~[insert actual cost to the district, e.g., \$5.00] (16 GB)]~~

- Except for any applicable costs of staff time as referenced below, there will be no charge for copying records from one digital format to another for electronic distribution (e.g., as an email attachment) or for scanning physical documents and saving them into a digital format (e.g., PDF) for electronic distribution. This provision is not a commitment to modify the format of any record when the District is not legally required to do so.

3. Photographs: The actual, necessary and direct cost of photographing and photographic processing, including applicable costs of staff time in excess of ~~insert the same time period that is used in the next paragraph – e.g., "one-half (1/2) hour"~~, ~~thirty (30 minutes)~~, as referenced below, will be charged for providing a photograph of a record when the record does not permit standard copying.

4. Non-Standard Reproductions: For any transcription or other specialized copying or reproduction of a record not otherwise covered in this fee schedule, a fee equal to the actual, necessary, and direct costs of such reproduction and transcription applies except that. If applicable, staff time shall be charged as referenced below.

5. Staff Cost for Copying/Reproduction: If, based on the quantity or type of records requested, the copying or other reproduction of the records requires more than ~~insert the applicable~~

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ACCESS TO PUBLIC RECORDS: PUBLIC RECORDS NOTICE AND FEE SCHEDULE

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Waukeek Community School District

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~~time period – e.g., "one-half (1/2) hour", thirty (30) minutes~~ of staff time, then the requester will be charged the hourly rate of total compensation of the lowest-paid employee capable of performing the copying/reproduction. ~~Editor's Note: According to the Attorney General's Public Records Compliance Guide, as a general rule, the rate for an actual, necessary, and direct charge for staff time should be based on the pay rate of the lowest-paid employee capable of performing the task. The law recognizes that specialized personnel (e.g., a computer programmer or an instructional technology professional) with higher hourly rates of pay may be needed to formulate and effectuate certain types of record location and copying tasks. However, authorities should limit the amount of time spent by specialized personnel to only that time required to perform the specialized portion of the local task, thereby minimizing the time spent using specialized and costly personnel.~~

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- Record Location Costs:** There shall be no charge for the costs associated with locating a record unless the actual, necessary and direct location costs associated with the request exceed \$50, in which case the entire actual cost shall be imposed upon the requester. "Locating" a record means to find it by searching, examining, or experimenting. The cost of staff time required for the location of records will be charged at the hourly rate of total compensation of the lowest-paid employee who is reasonably capable of performing the task.
- Postage:** If records are mailed or shipped to the requester, the actual, necessary and direct postage/shipping costs will be charged.
- Records Not Produced/Collected by District:** Notwithstanding the provisions above regarding copying or reproduction fees for records produced and maintained by the District or a District records authority, if a record is produced or collected by a person who is not a records authority pursuant to a contract entered into by that person and the District, the fee charged for copying the record shall be the actual, direct, and necessary cost of reproduction incurred by the person making the reproduction or transcription of the record, unless a fee is otherwise authorized or established by law.
- Fees Established by Specific Laws:** In a situation where any fees differing from the fees identified in this Notice are established by law or are authorized to be established by law for producing a particular record or type of record, those other fees may be charged.

Prepayment of authorized fees may be required for any request where the total fees exceed \$5. ~~Insert as a clarification if desired: "A request for any prepayment of or deposit on fees shall be based upon a good-faith estimate of the likely costs of responding to the request, with any difference to be refunded or collected once the actual amount is known."~~

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Requesters shall make checks for fees payable to [Waukeek Community School District](#) ~~identify proper payee~~.

~~Insert as a clarification, if desired: "Copying charges, as otherwise provided above, do not apply if the District, at its discretion, permits a requester to make his/her own copies."~~

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ACCESS TO PUBLIC RECORDS: PUBLIC RECORDS NOTICE AND FEE SCHEDULE

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~~Insert if desired and if consistent with the board's policy position on fees: "[As further addressed in Board policy,] the District reserves discretion to provide copies of records without a charge or at a reduced charge based on a determination that a waiver or reduction in fees is in the public interest."~~ ~~Editor's Note: PRG 133 Sample Policy 1 includes an optional paragraph that authorizes and establishes general parameters for such fee waivers. Most school boards elect to authorize potential fee waivers.~~

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SPECIAL NOTICE REGARDING RECORDS CONTAINING INFORMATION THAT IS PERSONALLY-IDENTIFIABLE TO A STUDENT

A parent, guardian or adult student who, pursuant to applicable state or federal law, wishes to inspect or copy personally-identifiable student records maintained by the District should submit such requests to the office of the student's current building principal, provided that the student in question is still enrolled in the District. Requests for records of former students should be submitted to ~~identify proper position/office~~ the registrar, except that requests for a copy of an individual's own high school transcript should be submitted to ~~identify proper position/office~~ the High School Counseling office. For more information regarding student records and accessing student records, see the District's student records policies and the student handbook. Fees other than those fees applicable to access to public records may apply to requests for student records.

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GENERAL PROCEDURES FOR HANDLING PUBLIC RECORD REQUESTS

823-Rule

Waunakee Community School District

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~~{This sample rule provides general guidance and procedures for both requesters and the legal custodian of records, including fee-related information.}~~

Individuals may obtain access to records maintained by the _____, Waunakee Community School District and the various District records authorities in accordance with applicable law, District policy, and the additional procedures outlined below.

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A. Accessibility of Records

1. Members of the public may request access to the public records that are under the supervision of the legal custodian by submitting a request to the records custodian during the regular business hours of the District's main Administrative Office, which are Monday through Friday, during regular business hours from ~~identify the appropriate office hours – e.g., 7:30 a.m. to 4:30 p.m.~~, except for holidays and such other exceptions as may be established in connection with the school calendar.
2. A requester will be permitted to use facilities comparable to those available to District employees to inspect or copy a record.
3. The legal custodian of records or his/her designee may require supervision of the requester during inspection or may impose other reasonable restrictions to maintain the security of the record(s).

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B. Record Requests under the Wisconsin Public Records Law

1. All requests to inspect or copy a public record shall be made to the legal custodian of records or his/her designee.
2. All requests must be reasonably specific as to the subject matter and time period of the records covered by the request.
3. Record requests may be made orally or in writing. Requesters may, but are not required to, contact the District to ensure receipt of the request.
4. At the discretion of the records custodian, and where there are legitimate reasons for doing so, the records custodian may promptly contact the requester to seek clarification of an ambiguous request prior to seeking responsive records or providing a formal response.
5. A requester may be required to show acceptable identification whenever the requested record is kept at a private residence, whenever security reasons require such measures, or where applicable state or federal law otherwise requires or permits an authority to request identification.¹

¹ This paragraph is new.

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6. Neither any records authority nor any legal custodian of records is required to create new records that do not presently exist in response to any request for information from the authority.
7. The records custodian is authorized by applicable law to reject "standing requests" for access to records that do not exist at the time of the request, but that may be created at a later date.
8. The legal custodian of records or his/her designee shall not sell or rent a record containing an individual's name or address of residence, unless specifically authorized by state law. The collection of general fees applicable to a records request is not a sale or rental under these procedures.²

C. Responses to Records Requests

1. All requests will be processed as soon as practicable and without delay. The time it takes the custodian to respond to the request will depend on factors including the nature and extent of the request and the availability of staff and other resources necessary to process the request. Access to inspect or copy records on the same day that the request is submitted is available only in limited circumstances.
2. Not all records created or maintained by the District are subject to inspection or copying by the public. Examples of records to which access may be prohibited or restricted include, but are not limited to, certain student records and certain records concerning applicants for positions, district employees, or public officers. In some cases, only a portion of record is subject to public inspection, while the remaining portion must remain confidential.
3. If the legal custodian decides to permit access to certain types of records concerning employees or individuals who hold a local public office, the custodian shall first determine whether the law requires the custodian to provide the record subject with advance notice of the decision to release the records. If such notice is required, it shall be provided prior to any release of the records, and the record subject shall be afforded the rights further outlined in state law.
4. In the event a records custodian denies a records request, either in whole or in part, the custodian shall identify the reasons that access to the records is being denied.
5. If a written request is denied in whole or in part, the requester shall receive a written statement of the reasons for the denial. Verbal requests may be denied verbally unless the requester makes a demand for a written statement of the reasons denying the request within five business days of the oral denial.
6. If the records custodian issues a written denial of a request, the custodian must also expressly notify the requestor within the response that the denial is subject to review in an

² This paragraph is new.

GENERAL PROCEDURES FOR HANDLING PUBLIC RECORD REQUESTS

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Waunakee Community School District

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action for mandamus under section 19.37(1) of the Wisconsin Statutes, or by application to the district attorney or attorney general.

D. Authorized Fees

~~*[Choose one of these options:*~~

~~*OPTION 1:*~~

~~*State the following:*~~

~~*"The fees that the District may charge in connection with a public records request are determined under Board policy and the fee schedule that appears in the District's posted public records notice. Information about such fees can also be obtained from the office of the District's legal custodian of records."*~~

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~~*OPTION 2:*~~

~~*Repeat the fee provisions that are included in the district's formal public records notice in their entirety.*~~

~~***{Editor's Note: IMPORTANT: The fee provisions appearing in any policy or rule must be consistent with the fee information that is ultimately included in the district's formal public records notice, which the district must post as provided in state law.***~~

~~***See PRG-823 Sample Exhibit 1 for an example of a formal public records notice that includes one possible approach to fee provisions.***~~

~~***The following provisions give a second (and different) example of a possible fee schedule that would be an alternative to the sample fee provisions found in PRG-823 Sample Exhibit 1. The example below does not attempt to separate the per-page costs of making copies from the staff time it takes to make the copies:***~~

~~*"The following fees are authorized to be charged to persons who request to inspect or copy the records of a District authority, to the extent such request is submitted, or responded to, under the Wisconsin Public Records Law:*~~

~~***1. Hard Copies of Records:***~~

- ~~***• Black and White*** – ~~*[insert a per-page amount that reflects actual, necessary, and direct copying costs—e.g., "\$0.05"] per side of a page for each paper copy that is made of any standard-size paper record or for any standard-sized printed copy of an electronic record that can be readily printed without substantial modification. There is no separate charge for any staff time that is required to make such standard-sized copies.*~~~~
- ~~***• Color*** – ~~*[insert a per-page amount that reflects actual, necessary, and direct copying costs—e.g., "\$0.10"] per side of a page for each paper copy that is made of any standard-size paper record or printed copy or for any standard-sized printed copy of*~~~~

GENERAL PROCEDURES FOR HANDLING PUBLIC RECORD REQUESTS

Waukeek Community School District

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~~an electronic record that can be readily printed without substantial modification. There is no separate charge for any staff time that is required to make such standard-sized copies.~~

2. ~~Electronic Copies of Records~~ ~~(includes any electronic records provided by email, PDF, DVD, flash drive, or other electronic format):~~

- ~~• The unit cost of any physical medium supplied by the District when providing electronic copies of records via such medium, such as a DVD [\$50, or other actual amount] or an 8GB flash drive [\$3.00, or other actual amount].~~

~~PLUS~~

- ~~• The lesser of the following:
 - ~~— The actual, necessary, and direct costs of applicable staff time to prepare the electronic copies for the format in which they will be transferred to the requester; or~~
 - ~~— To the extent the request involves creating standard, scanned electronic copies of standard-sized paper records, the per-page costs that would have applied to providing black and white physical copies of an equal number of record pages (as determined above).~~~~

~~The references, above, to the fees that are authorized to be charged for modifying the format of records in order to provide copies is not a commitment to modifying the format of any record when the District is not legally required to do so.~~

3. ~~Photographs:~~ ~~The actual, necessary and direct cost of photographing and photographic processing (which may include any costs of processing or reproducing an electronic photograph), including applicable costs of staff time, will be charged for providing a photograph of a record when the record does not permit standard copying.~~

4. ~~Non-Standard Reproductions:~~ ~~For any transcription or other specialized copying or reproduction of a record not otherwise covered in this fee schedule, a fee equal to the actual, necessary, and direct costs of such reproduction and transcription, including applicable costs of staff time.~~

5. ~~Location Costs:~~ ~~There shall be no charge for the costs associated with locating a record unless the actual, necessary and direct location costs associated with the request exceed \$50, in which case the entire actual cost shall be imposed upon the requester. "Locating" a record means to find it by searching, examining, or experimenting. The cost of staff time required for the location of records will be charged at the hourly rate of total compensation of the lowest-paid employee who is reasonably capable of performing the task.~~

6. ~~Shipping/Postage:~~ ~~If records are mailed or shipped to the requester, the actual, necessary, and direct postage/shipping costs will be charged.~~

GENERAL PROCEDURES FOR HANDLING PUBLIC RECORD REQUESTS

823-Rule

Waukeek Community School District

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~~7.— **Special Circumstances:** Notwithstanding the provisions above regarding copying or reproduction fees for records produced and maintained by the District or a District records authority:~~

~~a.— If a record is produced or collected by a person who is not a records authority pursuant to a contract entered into by that person and the District, the fee charged for copying the record shall be the actual, direct, and necessary cost of reproduction incurred by the person making the reproduction or transcription of the record, unless a fee is otherwise authorized or established by law.~~

~~b.— In a situation where any fees differing from the fees identified in these fee provisions are established by law or are authorized to be established by law for producing a particular record or type of record, those other fees may be charged.~~

~~Insert as a clarification, if desired: "Copying charges, as otherwise provided above, do not apply if the District, at its discretion, permits a requester to make his/her own copies."~~

~~If applicable, staff time that is charged in connection with any copying or reproduction costs will be calculated and charged at the hourly rate of total compensation of the lowest-paid employee capable of performing the applicable copying/reproduction.~~

~~Prepayment of authorized fees may be required for any request where the total fees exceed \$5. A request for any prepayment of or deposit on fees shall be based upon a good-faith estimate of the likely costs of responding to the request, with any difference to be refunded or collected once the actual amount is known.~~

~~Requesters shall make checks for fees payable to [identify proper payee].~~

~~Insert if desired and if consistent with the board's policy position on fees: "[As further addressed in Board policy,] the District reserves discretion to provide copies of records without a charge or at a reduced charge based on a determination that a waiver or reduction in fees is in the public interest."~~ **{Editor's Note: PRG 133 Sample Policy 1 includes an optional paragraph that authorizes such fee waivers. Most school boards elect to include authorization for potential fee waivers.}}**

Cross References:

WASB PRG 823 Sample Rule 1

Adoption Date: 02/14/2022

Revised Date:

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Policies of the Board of Education

Series 800: School-Community Relations

COMMUNITY USE OF SCHOOL FACILITIES

830

School buildings and facilities of the District shall be made available to the public ~~as freely as is consistent with~~ **per** state statutes, Board policies, and procedures. The superintendent, or his/her designee, may authorize the use of facilities, equipment, and services within established requirements.

Legal Ref.: Sections 120.12(9)
120.13(17), (19) and (20)

Cross Ref.: 342.8, District Day Care Programs
371.1, Equal Access to School Facilities
742, Authorized Use of School-Owned Equipment (Students and Staff)
830-Rule, Use of Facility Regulations
830-Exhibit (1), Facility Use Rental Fee Exemption Request
830-Exhibit (2), Fee Schedule

Adopted: March 1994

Revised: July 2002

Waunakee Community School District

Policies of the Board of Education

Series 800: School-Community Relations

FACILITY USE RENTAL FEE EXEMPTION REQUEST

830-Exhibit(1)

This form is to be utilized by any group or organization that is seeking an exemption from the applicable rental fee charged by the Waunakee Community School District for use of district facilities. The Board will review the written request at its next regularly scheduled meeting (provided the request is received in time to be included in the published agenda) and render a decision. All rental fees will be charged until an exemption is granted. The exemption, if granted, is for one year (365 days) from the date of Board action.

Name of Group/Organization:

Purpose(s) or Goal(s) of Group/Organization:

Type(s) of Service Provided the Waunakee Area Community and/or Waunakee Community School District:

Why should the Board of Education grant your request for an exemption from the rental fee charged a typical group/organization in your rental fee category?

What percentage of the members of your group or organization are residents of the Waunakee Community School District?

Other Information or Comments: (You may attach additional information)

Signatures (Representatives of the Group/Organization):

Date of Application

Date of Application

If an exemption is granted, the group or organization must fulfill all other requirements for use of the facility as outlined in Policy 830-Rule (custodial or caretaker fees, certificate of insurance, damages, etc.).

Board Action

Exemption Denied _____

Exemption Approved _____

Stipulations

Superintendent

Date

Adopted: 10/7/96

Revised: 8/10/98 (*changed policy number only*)

Waunakee Community School District

USE OF FACILITY REGULATIONS

830-Rule

General conditions relating to school use are as follows:

1. ~~Application~~ Requests for the use of a school building or any part of the building or grounds is to be made at least seven days in advance. School program related applications should be made to the building Pprincipal. Community program related applications should be made to the Activities Director.
2. A "Facilities Schedule" shall be kept by each school principal or his/her designee and be available for inspection and review. A District schedule will be kept in the Activities Director's office. The Activities Director's office will keep a schedule of activities which take place before and after school. This will include evening and weekend activities. Calendars and schedules shall be available for inspection and review during the regular school day.
3. To qualify as a recognized youth athletic group/organization a minimum of 80% of the total participants, of the organization, must reside within the Waunakee Community School District boundaries. The Activities Director or other District Administration has the discretion to request a residency report to ensure user groups are properly categorized.
4. Every non-school group using a facility must have an adult (non-K-12 student) designated as in charge of the activity or event. A District employee or village recreation program agent must be on duty during an activity which takes place in a school building.
5. Non-school events which take place on a Saturday generally are not charged custodial time. However, certain events may result in the user being charged for custodial costs. Non-school events which take place on a Sunday will be assessed a charge for custodial services. Student employees shall be hired at a rate determined by the Activities Director.
6. Every non-school individual, group, and/or organization using a school facility, by accepting a use permit, must agree to guarantee orderly behavior and to indemnify the District for any damages to the school and its property caused by any participant and public involved as well as provide a signed liability waiver document.
7. Applicants that are renting school facilities, and others as determined by the Activities Director, are required to file a certificate of insurance (~~except in the case of district residents' rental of the pool~~). The certificate of insurance naming the district as additional insured must be in the possession of the Superintendent-District Administrator or his/her designee before the usage may occur.

Liability waiver documentation and a certificate of insurance shall not be required of Village Recreation Department or its participants.

8. The District discourages the use of facilities for youth groups after 9:00 p.m. on nights before a school day.
9. School facilities shall exist primarily to serve school district educational, co-curricular, recreational and administrative activities. Upon the satisfaction of the public school district's need and use, district facilities shall then be made available to other groups based on the structure outlined below.
10. The Village Recreation Program shall enjoy a priority status among non-school facility users in scheduling events that utilize school district facilities for recreational purposes only. No rental fee shall be charged to the Village Recreation Program for these programs. All youth and adult members of the school district participating in village recreation programs which utilize school district facilities shall be treated equally in all aspects of program participation. Such programs shall not be in direct conflict with programs conducted by the school district. The Activities Director shall determine compatibility of programming. The director of the village recreation program and his/her designee(s) shall be granted access to district buildings and grounds including the appropriate keys to said individuals and approval of them to have security codes where needed. The Village Recreation Program will be subject to all board of education policies in the operation of all of its programs that take place on school district property.

Exemptions

In the event of multiple requests to use the same facility, earliest requests will normally have priority. Facilities cannot be scheduled earlier than the dates established by administrative guidelines. Facilities shall be made available to the widest variety of community members. The Activities Director shall determine such use. Appeals may be made to the ~~superintendent~~ **District Administrator**.

12. Any group that believes it should be exempted from a rental fee has the option of filing a written request with the Board of Education on the approved "Exemption Request" form (see 830-Exhibit). The Board shall consider the circumstances and stated reasons for seeking an exemption and make a decision at the next regularly scheduled Board meeting where the request can be placed on the agenda in time for proper meeting notification. Exemptions shall only be granted for good cause and shall only be for one year. Groups or individuals may re-apply annually for consideration for an exemption.

The Activities Director has the discretion to determine rental rates for groups or individuals not covered by the above categories. The Activities Director also makes a determination as to which category the applicants are assigned. The Activities Department will keep a District

Facility Fee schedule document to ensure consistent applications of facility fees. This document will be approved annually by the school board. Fees may also be reviewed, changed, or amended on an as needed basis by the school board.

The Activities Director may refuse to allow or may cancel the use of facilities to any group due to conflicts with school activities, safety, health or liability issues, security concerns, past experience with the proposed user, or other valid reasons. Denial of use may be appealed to the ~~superintendent~~ District Administrator.

Equipment of a specialized nature will be made available only with authorized personnel to operate it or supervise its operations. Use of specialized equipment is not encouraged.

Given the nature of existing specialized equipment and security issues, use of the kitchen by a public group to obtain or dispose of water needed for coffee, lemonade, etc., is not permitted without the presence of a custodian or caretaker. In no case is the kitchen to be opened or remain open without supervision.

Uses or conditions not covered in these procedures must be approved by the ~~superintendent~~ District Administrator and/or Activities Director.

Cross Ref.: 443.3, Use and Possession of Tobacco Products
443.4, Drug Free Schools
830-Exhibit (2), Community Use of Recreational Facilities
832, Public Conduct on School Property

Adopted: 2/14/83

Revised: 5/14/84
5/11/92
3/94
4/96
9/94
10/96
11/9/98
4/5/99
6/7/99
July 2002
December 2005
May 2007
April 2012
June 2017

Waunakee Community School District

RESTRICTIONS ON TOBACCO, NICOTINE, AND VAPOR PRODUCTS

Policy
[831.443.3/522.2/831](#)

Waukegan Community School
District

Page 1 of 4

(This sample policy is structured in separate sections that independently address (1) students; (2) employees; (3) certain contracted service providers and authorized agents of the school district; and (4) visitors and other persons who are not otherwise addressed. As such, the sample could be either adopted as a single policy with multiple sections or divided into three separate policies, coding the student provisions under topic 443.3, the employee and contractor/agent provisions under topic 522.2, and the remainder under topic 831. The restrictions in this sample go beyond the minimum legal mandates for prohibiting smoking and other tobacco use on school premises and beyond the laws that already prohibit the possession of certain products by minors.)

District Students

Use and Possession Prohibited: Students are prohibited from any type of smoking and from possessing, distributing, or using tobacco products, nicotine products, non-medical vapor products, and any related items intended to facilitate the ingestion of such substances. These prohibitions apply (1) at all times in all District buildings, in all District vehicles, and on all District premises; (2) while students are attending or participating in a District-sponsored event at any location; and (3) at any other time that a student is under the supervision of a school district authority.

Examples of prohibited items and products include the following: *{Editor's Note: The inclusion of these clarifying examples is optional. If included, the examples may be modified to address specific concerns.}*

1. Cigarettes, chewing tobacco, e-cigarettes, nicotine vaporizers, and similar products.
2. Products that use heat, electricity, or a similar mechanism to create smoke or a vapor that is intended to be ingested, and which may or may not contain nicotine.
3. The components, parts, or accessories of any product or device intended to facilitate the ingestion of tobacco, nicotine, or any non-medicinal ingestible vapor (e.g., rolling paper, pipes, or cartridges or similar refillable/replaceable elements).

Exceptions: Non-tobacco, non-nicotine devices or products that have a medical purpose and that are possessed or used by a student under the advice, supervision, or prescription of a medical professional are not prohibited by this policy but are subject to rules related to medication (to the extent applicable) and to any administrative rules or directives regarding appropriate times and locations for use.

District Employees

Prohibited Use: District employees are prohibited from using tobacco products, nicotine products, and non-medical vapor products (1) in all District buildings, in all District vehicles (owned, leased, or contracted), and on all District premises; and (2) in any non-District location when the employee is acting in the scope of his/her employment and either students are

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RESTRICTIONS ON TOBACCO, NICOTINE, AND VAPOR PRODUCTS

Policy
[831443.3/522.2/831](https://www.waunakee.k12.wi.us/831443.3/522.2/831)

Waunakee Community School
District

Page 2 of 4

present or the use of the product at the location is separately prohibited by law or by the owner of the property.

Restrictions on Possession: To the extent a District employee possesses any otherwise-lawful tobacco, nicotine, or non-medical vapor product on District property or when acting in the scope of their employment, the product shall be stored in the employee's personal vehicle or remain contained at all times within a separate personal item that effectively conceals the product and that serves as a reasonably-effective deterrent to student access.

Exceptions:

1. FDA-approved smoking cessation products that may contain nicotine (e.g., certain chewing gums, lozenges, or patches) that do not have the appearance of a tobacco product, e-cigarette, or nicotine vaporizer are not prohibited by this policy provided that the employee (1) follows the applicable directions for use of the product; (2) observes any District directives relating to the manner of use of the product; and (3) stores the product in a manner that serves as a reasonably-effective deterrent to student access.
2. Non-tobacco, non-nicotine devices or products that have a medical purpose and that are possessed or used under the advice, supervision, or prescription of a medical professional are not prohibited by this policy but may be subject to other policies, rules, or administrative directives regarding use in a school setting.
3. ~~Insert if desired: "Upon the written request of a District employee, the Human Resources Director, District Administrator or his/her administrative level designee, may grant other specific permissions regarding any non-tobacco product that is otherwise prohibited or restricted under this policy if, in the judgment of the administrator, the request will not jeopardize the health of any person and approval would accommodate an exceptional individualized need or fulfill a compelling educational purpose."~~

Contracted Service Providers and Authorized Agents of the District

Any contracted service provider, employee of a contracted service provider, or authorized agent of the District (e.g., an authorized District volunteer) who provides services to the District on District premises, in District vehicles, or when students are present in other settings is subject to the same prohibitions, restrictions, and exceptions regarding tobacco, nicotine, and vapor products as apply to District employees. To the extent relevant to the application of those policies and rules, any such person and the District shall consider whether the service provider or agent is (or was) acting within the scope of the applicable contractor or agency relationship.

Visitors and Other Individuals

~~⁴This is optional language. I do not see similar language in your current policy, wanted to let you make the choice regarding including or deleting this.~~

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RESTRICTIONS ON TOBACCO, NICOTINE, AND VAPOR PRODUCTS

Policy
[831-443.3/522.2/831](#)

Waukegan Community School
District

Page 3 of 4

Prohibited Use: Although additional restrictions apply to students, District employees, and other designated contractors and agents of the District, no person may smoke or otherwise use any tobacco product, any type of e-cigarette, any nicotine product that is not an FDA-approved smoking cessation product, or any vapor product that contains (or may sometimes contain) nicotine while the individual is on any premises owned, rented/leased, or controlled by the District or in any vehicle that is owned, rented/leased, or contracted by the District.

Exceptions:

1. This policy is not intended to prohibit the use of a non-nicotine, vapor-producing device that is designed and appropriately used for a medical purpose.

2. ~~A person who is renting District-owned property for a noneducational purpose, excluding any indoor or other enclosed space where educational services are normally provided, may submit a written request asking the District to approve an exception to the prohibitions established by this policy. (Choose either: "At its sole discretion, the School Board" or "On behalf of the School Board, the District Administrator or his/her administrative level designee") may approve or deny an otherwise lawful exception for such a renter. (Editor's Note: The potential application of this exception is limited primarily to outdoor facilities because state and federal law would prohibit any such exception with respect to smoking in any enclosed school building/facility where educational services are provided. If the current board does not intend to entertain granting any such exceptions, the exception could be deleted from the policy, or the sample could be modified to expressly direct the administration to deny all such requests on behalf of the board.)~~²

Notice and Enforcement

~~*Insert if desired: "The administration shall make efforts to inform the public of the conduct prohibited by this policy, including by posting signs and by providing other appropriate information (e.g., in verbal, written, and/or electronic formats)."*~~ (Editor's Note: With respect to smoking, such notice is required under section 101-123(2m)(c) of the state statutes, but the mandate does not need to appear in a board policy as long as the district is in compliance.)

Administrators and other facility/event/activity supervisors shall enforce District policies and rules prohibiting the use or possession of tobacco products, nicotine products, vapor products, and related products/devices by, for example: (1) directing an individual to cease prohibited conduct or to remove themselves from the premises; (2) applying disciplinary and other consequences; and/or (3) referring a situation (including refusals to cooperate) to law enforcement. **(Editor's Note: If a district separates this single policy into multiple policies (as described in the introductory note, above), the district may wish to repeat this sentence about enforcement in each such policy.)**

² The language in yellow would allow your district to create exceptions to the tobacco prohibition for third-party users of outdoor school facilities on a case-by-case basis. You have nothing similar in your current policy and you might decide to delete the entire paragraph.

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RESTRICTIONS ON TOBACCO, NICOTINE, AND VAPOR PRODUCTS

Policy
[831-443.3/522.2/831](#)

Waukegan Community School
District

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Legal References:

Wisconsin Statutes

- [Section 101.123](#) [smoking prohibited in certain enclosed places; notice and enforcement required]
[Section 111.321](#) [prohibited employment discrimination on the basis of the use of lawful products off the employer's premises during nonworking hours]
[Section 120.12\(20\)](#) [school board duty to prohibit tobacco use on school premises]

Federal Laws

- [20 U.S.C. §§7971-7974](#) [smoking prohibited in certain indoor facilities providing education services to children; see also [20 U.S.C. §§6081-6084](#)]

Cross References:

- [447.3. Student Suspensions](#)
[447.5. Discipline of Students with Disabilities](#)
WASB PRG 831 Sample Policy 3

Adoption Date: [12/13/82](#)

Revised: [5/14/84](#)

[10/13/87](#)

[4/22/91](#)

[5/11/92](#)

[March 1994](#)

[March 2002](#)

[September 2018](#)

[December 2023](#)

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OUT OF SEASON ATHLETIC CLINICS/LEAGUES

Waunakee Community School District

Policy
#379/831.1

Page 1 of 2

The Waunakee Community School District Board of Education recognizes the interest and positive aspects of the young people of the community being involved in organized sports leagues and clinics. However, there are concerns about the impact these programs, if not regulated, will have on the time young people, especially below the high school age, have to complete school work and be involved in school activities. Additionally, these programs, if not properly structured and operated, could jeopardize the athletic eligibility of student athletes in WIAA sanctioned sports in the middle and high school.

Therefore, the Board of Education has adopted the following policy and procedures to guide administration, staff, and community members on the use of school facilities for these activities and to allow for a review of activities that may endanger a student's eligibility to participate in district sponsored athletic programs.

1. Any requests for facility use for the purpose of conducting an athletic clinic (or similar activity), practice, or competition for students in grades 7 through 12 will be sent to the athletic director for review before granting permission for the use of the facility. The athletic director will determine if the activity is in compliance with WIAA rules and regulations. Use will be denied if there is a probable violation of these rules and regulations.
2. Individuals applying for facility use for clinics, practice or competition shall be provided a copy of the WIAA regulations on "out-of-season" clinics.
3. The district shall not grant permission to use school district facilities for athletic clinics, practice or competition to programs for participants in sixth grade or younger that will conclude after 9:00 p.m. on an evening preceding a day school is scheduled.

Facilities will not be scheduled for non-school athletic clinics, practice or competition that will conclude after 10:00 p.m on any evening.

4. District varsity coaches in cooperation with the athletic director, shall develop and publish a statement of their "philosophy" on out of season clinics/competitions. This shall be shared with parents/guardians and booster club members. The intent is to provide support for having student-athletes involved in as many different athletic opportunities as reasonably possible without it negatively impacting academic excellence, family life, or future athletic opportunities.

Legal Ref.: Sections 120.13(17) Wisconsin Statutes
120.13

Cross Ref.: 830, Public Use of School Facilities
WIAA Handbook

OUT OF SEASON ATHLETIC CLINICS/LEAGUES

Waukegan Community School District

Policy
#379/831.1

Page 2 of 2

Adoption Date: 6/8/98
Revised: January 2002
May 2005
August 2013
May 2023

WEAPONS ON SCHOOL PREMISES

Policy 832

Waukegan Community School District

Page 1 of 3

(This sample policy defines prohibited dangerous weapons by reference to state law and allows weapons possession and use on school premises under certain specified conditions. Especially as applied to students, districts may find that additional provisions in separate policies or rules may be helpful to, for example, clarify expectations regarding possession of certain knives, look-alike weapons, etc., not all of which would necessarily be covered under the state-law definition of "dangerous weapon.")

No person, including someone with a state-issued concealed carry license, shall use or possess a firearm, whether loaded or unloaded, any destructive device, or other dangerous weapon (as defined under [section 948.61](#) of the state statutes or as defined as a weapon in this policy below) in school buildings and other buildings owned, occupied or controlled by the school district, on school premises, in school-provided transportation, or at any school-supervised and school-controlled activity, except as otherwise specifically authorized in this policy.

A weapon is any object that by its design and/or use can cause bodily injury or property damage, or any component of such an object. This includes, but is not limited to guns, including BB and pellet firing guns, firearm silencers, knives, razors, karate sticks, nunchaku, metal knuckles, chains, pepper spray/mace and other similar propellants, and similar items or destructive devices such as explosives or fire bombs. A weapon is also defined as any facsimile or look-a-like of a weapon or firearm such as a toy, starter pistol, or other object that can be perceived as an actual firearm. A weapon also may include physical actions or oral or written statements, which lead others to reasonably believe, or are calculated to induce a belief, that a weapon is present.

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The following are exceptions to the policy prohibition:

- This prohibition does not apply where state law prohibits a school district from restricting any individual's right to possess a firearm or other weapon in a location covered by this policy ~~(e.g., a law enforcement officer who is acting in his/her official capacity and who possesses a firearm or other weapon that was issued and approved by the officer's employing agency; certain individuals 21 years of age or older who are licensed to carry a concealed weapon who have stored a licensed handgun that is unloaded and encased in their motor vehicle parked on school grounds).~~
- Any qualified current law enforcement officer who is off duty or any qualified former law enforcement officer may possess a properly licensed firearm provided that the individual meets all applicable conditions specified in the state and federal gun-free school zone laws. Include if desired: "Although permitted, the Board generally discourages the intentional presence of such firearms, and strongly encourages such individuals to notify the District Administrator, building principal, or other activity supervisor of their possession of any such firearm in order to avoid misunderstandings should the presence of the weapon be identified by another person."²

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¹ The highlighted language is from your current policy. Your current policy covers weapons that may not meet the definition of dangerous weapons in Wisconsin Legislature: 939.22(10). The second sentence covers some dangerous weapons covered in the first paragraph and also cover facsimile weapons and physical actions not covered by the first paragraph.

² This highlighted language is optional.

WEAPONS ON SCHOOL PREMISES

Policy 832

Waunakee Community School District

Page 2 of 3

- The building principal may allow a weapon on school premises for purposes of demonstration or educational presentations. This approval must be in writing and granted prior to the weapon being brought to the school. The weapon shall be maintained in the possession of the principal except during the actual demonstration or presentation.
- Firearms or other weapons used for hunting may be allowed on school property for hunter safety classes, but only during non-school hours and after approval, in writing, from the District Administrator. The person(s) conducting the hunter safety class will assume responsibility for the safe handling and care of the firearms/weapons, and see to it that all firearms/weapons are removed from the premises promptly after the class.

~~Hunting may be allowed in the school forest when school or rental groups are not using the property and with written permission from the District Administrator. Hunting for a wild animal will not be permitted in the school forest when there is not an open season for that animal on land adjacent to the school forest. All persons authorized to hunt in the school forest shall abide by state and federal laws while hunting on school forest property including, without limitation, laws applicable to firearms and hunting, and shall abide by all District rules regarding the use of the school forest.³~~

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Any student who possesses a firearm or destructive device in violation of this policy shall be suspended from school, referred for an expulsion hearing and expelled from school for not less than one year. The School Board may modify this expulsion requirement on a case-by-case basis. Students possessing other weapons in violation of this or any other policy or rule shall be subject to appropriate school disciplinary action, up to and including suspension and expulsion from school. A parent or guardian with access to student records will be notified of student weapons violations in all cases. When required by federal law, a law enforcement or juvenile justice referral shall also be made for any student who violates this policy.

Employees violating this policy shall be disciplined in accordance with employee policies, agreements and handbooks and referred to law enforcement officials for prosecution.

Any other person violating this policy shall be referred to law enforcement officials for prosecution.

The District Administrator or designee shall determine the appropriate means of informing students, employees and the public of this policy, including any specific notice(s) that are required under applicable law.

Legal References:

Wisconsin Statutes

Section 118.07	[school safety plans]
Section 118.31	[use of reasonable force to obtain weapon]
Section 120.13(1)(bm)	[state law suspension mandate for possession of a firearm]
Section 120.13(1)(c)2m	[state law expulsion mandate for possession of a firearm]
Section 120.13(1)(g)	[board authority to modify expulsion mandate on case-by-case basis]

³~~I am guessing you do not have a school forest or may not allow hunting in a school forest — you can delete this paragraph if it is not relevant.~~

WEAPONS ON SCHOOL PREMISES

Policy 832

Waukegan Community School District

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- [Section 120.13\(38\)](#) [board authority to permit hunting in the school forest]
- [Section 175.32](#) [mandatory reporting of threats of school violence]
- [Section 175.60](#) [license to carry a concealed weapon]
- [Section 941.23](#) [carrying a concealed weapon]
- [Section 943.13](#) [criminal trespass law, includes provisions related to carrying firearms]
- [Section 948.60](#) [possession of dangerous weapon under 18 years of age]
- [Section 948.605](#) [gun-free schools zones]
- [Section 948.61](#) [dangerous weapons other than firearms on school premises]

Federal Laws

- [Gun-Free Schools Act](#) [student possession of firearms prohibited; student referral to law enforcement/juvenile justice system required in policy]
- [18 U.S.C Sec. 921\(a\)](#) [federal definition of "firearm" (including destructive devices) that is used within the Gun-Free Schools Act and within section 120.13(1)(c)(2m)]
- [Individuals with Disabilities Education Act](#) [programs and services for students with disabilities; includes authority to order change of placement for weapons possession]

Cross References:

WASB PRG 832 Sample Policy 2

- [447.3, Student Suspension](#)
- [447.4, Student Expulsions](#)
- [447.5, Discipline of Students with Disabilities](#)
- [723-Rule, Emergency Plan Procedures](#)

Adoption Date: [March 1994](#)
[September 1994](#)

Revised: [12/11/95](#)
[March 2002](#)
[July 2006](#)
[July 2012](#)
[December 2023](#)

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Policies of the Board of Education

Series 800: School-Community Relations

PUBLIC CONDUCT ON SCHOOL PROPERTY

832-860 Rule 2

No person on school property shall:

- Injure or threaten to injure the person of another.
- Damage the property of another of the District.
- Conduct himself/herself in such manner as to impede, delay, or otherwise interfere with the orderly conduct of the educational program of the District or any other activity taking place on school property which has been authorized by the Board of Education, superintendent, building principal, or other authorized District employee.
- Enter upon any portion of school premises at any time for purposes other than those which are lawful and/or authorized by the Board. Willfully violate other rules and regulations adopted by the Board or administration designed to maintain public order on school property.

Individuals who violate this policy are subject to police referral or other legal action. In addition, students who violate this policy will be subject to suspension and expulsion pursuant to the provisions of state law or other appropriate penalties as may be determined.

Legal Ref.: Section 120.12 (1) Wisconsin Statutes
120.13

Cross Ref.: 447.3, Student Suspension
447.4, Student Expulsion
720, District Safety
731.1, Vandalism
830-Rule, Facility Use Regulations
831, Student Tobacco Use on School Premises
833, Weapons on School Premises
860, Visitors to the Schools

Adopted: 2/14/83

Revised: March 1994
July 2002

Waunakee Community School District

Policies of the Board of Education

Series 800: School-Community Relations

FACILITY USE – PET RESTRICTION

833

The school buildings, parking lots and athletic facilities of the Waunakee Community School District are expressly limited for the use of students, employees, community groups, rental groups and visitors at all times. No mammals, fowl, reptiles, amphibians, fish, pets or exotic pets are allowed on school premises unless the animal or pet has been administratively approved as part of a classroom curriculum, building program (i.e., pet day, VIP Day, birthday, family learning night, public/student observations, etc.), canine assistance ~~or canine being trained to provide assistance~~ for blind, deaf or mobility impaired individuals, as part of a law enforcement canine training program or as part of an administratively authorized drug search.

This restriction applies to all activities held on school grounds or in school buildings as noted.

Any group requesting use of school facilities will be provided with copies of this policy and the district guidelines regarding pets in the classroom as part of a facility use request.

Legal Ref.: Sections 895.481
895.52

Cross Ref.: 830-Rule Use of Facility Regulations
832 Public Conduct on School Property
838.1 Service Animals

Adopted: September 2007

Waunakee Community School District

FACILITY USE – PET RESTRICTION

833 Exhibit

These guidelines allow for animals to be kept as pets in the classrooms of Waunakee Community School District. The following provides suggestions for management of pets in the classroom. It is intended to provide common sense guidelines for successfully maintaining a pet within the learning environment.

POSITIVE VALUE OF PETS IN THE LEARNING ENVIRONMENT

1. Students learn about different animals and their care.
2. Students become confident in handling animals.
3. Students gain a sense of responsibility, empathy and appreciation as they care for an animal.
4. Animals can offer security and friendship for a child.
5. Animals add a sense of community to a classroom as they communicate about the animal and its needs to other students within the classroom.
6. Taking responsibility for a pet develops a sense of caretaking and enhances a child's belief that they are capable and important.
7. Animals provide an impetus for further learning about the world around us.
8. Students develop good observation skills.
9. Student may write and read about their animal.
10. Students learn about animal behavior and instincts.

GUIDELINES

1. Information about children's allergies should be obtained.
2. A **communication letter**, explaining the type of pet and general information about the pet, should be sent home to parents.
3. Handling the pet shall remain optional.
4. Animal(s) must be humanely and properly housed in cages, aquariums, etc. specific for the species. A stress free environment should be provided for animals. There should be an area for an animal to hide if it does not want to be handled.
5. Appropriate handling of the pet shall be taught.
6. Care and feeding of the pet may be shared by interested students.
7. Cleaning of the pet's environment may be shared with interested students in a way that is safe and healthy for the pet and students.
8. Cages shall be kept clean and free of unnecessary odors.
9. Cleaning animal cages shall never be the responsibility of custodians or teaching assistants.
10. Waste materials from the animals should be bagged separately.
11. Pets shall be supervised at all times.

12. If any individual is bitten or scratched by an animal and the skin is broken, the affected area should be cleaned thoroughly with soap and water and then the incident must be reported to the parents and principal.
13. Keeping the pet may need to be reassessed if a child develops allergies or a new student with allergies enters the classroom.

PETS VISITING SCHOOL

1. Pets will be allowed to visit classrooms with Principal's approval.
2. A copy of the pet's current immunization records should be submitted to the Principal along with request to bring pet to school.
3. Information about children's allergies should be reviewed prior to pet visiting classroom.
4. Students/parents should be informed when the pet will be in the classroom.
5. The pet must be appropriately caged or on a leash no longer than five (5) feet in length.
6. Student handling of the pet will be optional ~~and dogs/cats must be muzzled if handling is anticipated within the classroom for safety reasons.~~

These guidelines were developed in consultation with a variety of people knowledgeable about the subject, including public health officials. ~~The guidelines will be reviewed after implementation and modified as necessary.~~

Legal Ref.: Sections 895.481
 895.52

Cross Ref.: 830-Rule Use of Facility Regulations
 832 Public Conduct on School Property
 838.1 Service Animals

Adopted: September 2007

Waunakee Community School District

PUBLIC GIFTS TO THE SCHOOLS

Policy 840

Waukegan Community School District

Page 1 of 3

~~(This sample gift policy assigns authority for the approval of public gifts to the schools based on the estimated value of the gift, and outlines conditions that must be met in order for a gift to be accepted.)~~

Any unsolicited gift offered to the District (1) with restrictions or conditions; or (2) having a value (or estimated value) of ~~identify the applicable amount – e.g., \$5,000~~ or greater should be accompanied by a letter to the District Administrator and presented for possible approval and recognition by the School Board. Gift offers without restrictions or conditions ~~and having a value (or estimated value) of less than [the amount inserted above]~~, as well as all gifts that are made in conjunction with a pre-approved District solicitation campaign for a specific purpose, may be accepted on behalf of the Board by the District Administrator or his/her administrative-level designee. Potential donors are strongly encouraged to discuss their gift plans with school officials prior to purchasing any gift(s) or engaging in any fundraising or similar activities.¹

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To be accepted, a gift must, at a minimum:²

- have a purpose consistent with the mission and goals of the District;
- be compatible with curricular, technological, instructional, programmatic, and operational practices of the District, as may be applicable;
- neither impose, nor be substantially likely to impose, any undesirable or unacceptable costs (whether direct or indirect) upon the District, including but not limited to unacceptably adding to staff workloads;
- not begin a program that the donor intends to be ongoing, but where the Board has determined prior to acceptance of the gift that the District very likely would be unable or unwilling to continue the program when gift funds are exhausted;
- not prevent the Board from being able to properly discharge its duty to ultimately determine the District's educational program and the manner in which educational and other services are to be delivered;
- not require the District to publicly endorse any specific business, organization, service or product, with the understanding that recognition of a donor differs from explicit endorsement; and
- be consistent with applicable provisions of District policy and school rules and in compliance with legal requirements.

The District shall not unlawfully discriminate in the acceptance or administration of gifts, bequests, scholarships, or other aids, benefits, or services to students from private agencies, organizations or persons on the basis of sex, sexual orientation, race, color, national origin, ancestry, religion, creed, pregnancy, marital or parental status, any physical, mental, emotional or learning disability, or any other legally-protected status or classification. Discrimination complaints shall be processed in accordance with established District complaint procedures.

¹ ~~Current board policy requires board approval for all gifts. That is a choice that the board may make, and you could substitute the first paragraph of current board policy for this paragraph. You might consider whether board approval should be required for small gifts made without condition or restriction.~~

² ~~Note the gift conditions are policy choices that may be edited or deleted.~~

PUBLIC GIFTS TO THE SCHOOLS

Policy 840

Waunakee Community School District

Page 2 of 3

No District employee shall, acting on behalf of the District or for the benefit of any District school or District program, solicit specific gifts or donations from any individual or entity or by using any website or social media outlet without first obtaining the written approval of *insert appropriate position(s) – e.g., the District Administrator or a building principal*. *Editor's Note: if your district has adopted a separate policy or procedure governing the use of crowdfunding sites to solicit donations, then you should either delete this paragraph from this policy or revise it to say: "No District employee shall, acting on behalf of the District or for the benefit of any District school or District program, solicit specific gifts or donations from any individual or entity without first obtaining the written approval of insert appropriate position(s), e.g., the District Administrator or a building principal. Any use of crowdfunding sites to solicit donations shall be done in accordance with the District's crowdfunding policy and/or procedures."*

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The District reserves the right to accept or reject any gift offer made to the District from any individual, organization, business or other entity. Except for any conditions expressly accepted by the District in connection with approving and receiving the gift, the District's acceptance of a gift shall not entitle the donor to any special privileges or considerations from the District.

All gifts accepted by the District will become the property of the District to be used at the discretion of the District unless otherwise specified as a condition of the gift offer or bequest and unless such conditions have been approved by the District in connection with accepting the gift or bequest. All monetary donations shall be deposited in the appropriate designated District depository and shall be properly accounted for in accordance with applicable laws and the Wisconsin Uniform Financial Accounting Requirements (WUFAR).

Proper acknowledgement (recognition) shall be given for all gifts accepted and received by the District. The degree of recognition should be reasonably correlated with the significance of the contribution. The minimum form of recognition that should be provided to each donor is a letter of appreciation from a staff member who works in an area that will benefit from the gift (if applicable) and/or a similar letter from one or more of the school district official(s) who accepted the gift on behalf of the District.

Where required by applicable federal law and/or upon a donor's request, the District Business Office will provide a letter of acknowledgement to a donor on District letterhead for purposes of substantiating the donor's contribution. However, the District shall not attempt to assign a monetary value to any non-monetary gifts or donations in conjunction with issuing such letters of acknowledgement/substantiation.

Legal References:

- Wisconsin Statutes**
- [Section 118.13](#) [student nondiscrimination]
- [Section 118.27](#) [acceptance of gifts and grants; includes authority to transfer gift/grant to community foundation under set conditions]
- [Section 881.01](#) [trust fund management; prudent investment rule]
- [Section 895.515](#) [liability exemption; equipment or technology donation]

Wisconsin Administrative Code

PUBLIC GIFTS TO THE SCHOOLS

Policy 840

Waunakee Community School District

Page 3 of 3

[PI 9.03\(1\)\(d\)](#) [student nondiscrimination in policies on acceptance and administration of gifts]

Federal Law

Internal Revenue Code statutes and regulations addressing charitable contributions (see [IRS Publication 1771](#))

Cross References:

- WASB PRG 840 Sample Policy 2
- [362-Rule, Selection of Instructional Materials](#)
- [363, Special Interest Materials](#)
- [374 Student Fundraising Activities](#)
- [851, Advertising in Schools](#)
- [851-Rule, Sales/Advertising Exceptions](#)

Adoption Date: ~~2/14/83~~

Revised: ~~9/14/87~~

~~March 1994~~

~~July 2002~~

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SALES AND SOLICITATIONS ON SCHOOL PROPERTY

Wauaukee Community School District

Policy 850

Page 1 of 3

~~(This sample policy prohibits sales, solicitations and promotions (including advertising) on school district property except as specifically authorized within the policy.)~~

Except as provided in this policy or by another Board policy, no person may sell or promote the sale of goods or services on school district property, including property to which the District controls access when such property is temporarily being used for District operations or for a District-sponsored purpose.

Further, pursuant to state law, it is unlawful at all times and without any exception for any District employee to receive for his/her personal benefit anything of value from any person other than the District to sell, promote the sale of or act as an agent or solicitor for the sale of any goods or services to any student while on District property or at a District-sponsored activity.

The following are authorized exceptions to the above-stated general prohibition against the sale of goods or services and against the promotion/solicitation of such sales:

1. When approved in advance by the relevant building principal, the Director of Business Services ~~Business Manager~~, or District Administrator, sales (or promotions of sales) of goods or services by students, student groups, employees, or others for a school-related or educational purpose.
2. District-approved fundraising activities and event concessions.
3. The sale of food and beverages through the District's school meal program.
4. ~~To the extent consistent with any applicable mandatory federal nutrition requirements, the District approved sale of food and beverages outside of the school meal program, including District approved vending arrangements.¹~~
5. Administratively-approved paid advertising for goods and services within any District-sponsored publication/media that regularly accepts and publishes paid advertisements as a means of financial support. All such advertising is subject to administratively-established standards intended to foster an educationally-appropriate, safe, and nondiscriminatory atmosphere. Such advertising shall never promote tobacco, alcohol, drugs, weapons, or gambling or include any material that is sexually-explicit or vulgar.
6. A person who, in advance, has made an appointment to meet with one or more District employees for the purpose of discussing the sale, or possible sale, of goods or services to the District.
 - a. All such persons, upon their arrival, shall check in with the main office of the building in which their meeting is scheduled and follow the District rules surrounding school visitors.
 - b. In addition, all third-party entities and individuals seeking to sell goods or services to the District are expected to obtain advance authorization from an administrator or

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¹ ~~Your district does not participate in federal nutrition programs so this paragraph can be modified to delete the highlighted language if you wish.~~

SALES AND SOLICITATIONS ON SCHOOL PROPERTY

Waunakee Community School District

Policy 850

Page 2 of 3

supervisory-level employee before contacting any non-administrative and non-supervisory employee with whom the seller has no pre-existing business relationship.

- c. In person, third-party solicitations for the sale of goods or services to the District that are not pursuant to an advance appointment or directly related to a pre-existing business relationship with the District are strongly discouraged. Such solicitations shall be directed solely to the main District Business Office, where the third party may or may not be approved to meet with any representative of the District.
- 7. Sales and the promotion of sales pursuant to a third-party's pre-approved facilities use agreement with the District, during the time that the third-party is using District facilities for the approved purpose.
- 8. When property that is neither owned nor leased by the District is temporarily being used for District operations or for a District-sponsored purpose, any sales or promotional authority that has been reserved by the owner or operator of such property.
- 9. In a manner authorized in advance by the relevant building principal (or by the primary supervisor of any District building/property that is not a school), an employee's incidental and occasional sale (or promotion of the sale of) of property, goods, or services to other District employees, provided that such activity does not interfere with District operations or with any employee's work-related responsibilities. As an example, a building principal may permit employees to place notices of items of personal property that are for sale on a bulletin board that is located in a staff lounge.
- 10. Any other sales or promotion activity that the District Administrator or an administrative-level designee has approved in advance. However, the administration shall not approve any such activity directed toward sales to students or their parents or guardians that lacks a clear school-related or educational purpose.
- 11. Any other sales or promotion activity that has been approved in advance by the School Board. All commercial advertising of goods and services on school property that is not otherwise addressed in this policy and for which there is no clear school-related or educational purpose requires the advance approval of the Board.

Legal References:

Wisconsin Statutes

[Section 118.12](#) [sale of goods and services at schools]

[Section 175.10](#) [sales to employees prohibited]

Federal Laws

[Healthy, Hunger-Free Kids Act of 2010](#) [school wellness policy requirements, including requirements related to food sold during the school day]

["Smart Snacks" Rule](#) [minimum nutrition standards for all foods sold outside of the school meal program during the school day]²

² The federal law references relate to federal nutrition programs – your district does not participate in these programs and the federal law references may be deleted if you wish.

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SALES AND SOLICITATIONS ON SCHOOL PROPERTY

Wauaukee Community School District

Policy 850

Page 3 of 3

Cross References:

- WASB PRG 850 Sample Policy 1
- [374. Student Fundraising Activities](#)
- [524.1. Staff Conflicts of Interest](#)
- [672.4. Vendor Relations](#)
- [762. Vending Machines](#)
- [851. Advertising in the Schools](#)
- [851-Rule, Sales/Advertising - Exceptions](#)

Adoption Date: 2/14/83

Revised: 12/8/86

March 1994

December 1996

July 2002

August 2018

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ADVERTISING IN THE SCHOOLS

Neither the facilities, the name, the staff, nor the students of the schools, school system, nor any part thereof shall be employed in any manner for advertising or otherwise promoting the interests of any commercial or other non-school agency or organization except that:

- 1) The school may cooperate in furthering the work of any non-profit, community-wide social service agency, provided that such cooperation does not resist or impair the educational program of the schools.
- 2) The school may use films or other educational materials bearing only simple mention of the producing or sponsoring firm.
- 3) The schools may participate in radio or television programs under acceptable commercial sponsorship when such participation is supplementary or beneficial to the program of the schools.
- 4) The ~~superintendent~~ **District Administrator** may, at his/her discretion, announce or authorize to be announced, any lecture or other community activity of particular educational merit.
- 5) The schools may, upon approval of the **District Administrator** ~~superintendent~~, cooperate with any governmental agency in promoting activities in the general public interest which are non-partisan and non-controversial and which promote the education or other best interests of the students.
- 6) School publications may accept and publish paid advertising under established procedures.
- 7) School media productions may accept paid advertising under established procedures.
- 8) High school academic courses may involve students in the process of seeking paid advertising as a part of the course curriculum. These courses require prior approval of the School Board.
- 9) Teachers may use source materials from commercial agencies, provided that this material has been approved by the principal. Approved source material may, from time to time, be called to the attention of the teachers by principals and the **District Administrator** ~~superintendent~~.
- 10) Other special situations as approved by the **District Administrator** ~~superintendent~~ and/or Board of Education (e.g. scoreboards).
- 11) The District prohibits advertising that:

- Promotes or contains references to alcohol, tobacco, drugs or drug paraphernalia.

This does not prohibit advertising or promotion by or on behalf of enterprises (e.g., grocery stores, restaurants or bowling alleys) which sell alcohol or tobacco products as an ancillary part of a business.

- Promotes or contains references to weapons; lewd, vulgar, obscene, pornographic or illegal materials or activities; gambling or gambling aids; violence; hatred; sexual conduct; sexually explicit material; TV-MA, or X-, NC-17, or R- rated movies.
- Contains libelous material or false, misleading or deceptive claims. · Creates a substantial disruption in the school environment or inhibits the functioning of any school.
- Contains material that exploits or demeans a person, including a person’s protected status.
- Creates an endorsement of a political cause, activity, candidate or position.
- Promotes organizations that are in competition with the school district.
- Negatively affects the fiscal condition of the District and/or places any financial or other limitations on the District.
- ~~[(Option)]~~ Is submitted by or on behalf of a religious group or organization... ~~That has or~~ implies religious content, affiliation, purpose, or, in the judgment of the District, would in any way suggest that the advertisement or its sponsor(s) have the imprimatur of the District.
- Submitted by any individual or group whose purpose(s), behavior, actions, goals, or any other objective(s), in the discretion and judgment of the District, evince hostility, menace, or acts of violence toward any group of individuals, including racial, gender, ethnic, religious, cultural, national origin, and other groups that include District students and parents/guardian(s).

Legal Ref.: Section 118.12 Wisconsin Statutes

Cross Ref.: 363, Special Interest Materials
372, Student Publications
850, Public Sales and Solicitations on School Property
851-Rule, Sales/Advertising – Exceptions

Adopted: 2/14/83

Revised: March 1994
December 1996
July 2002
May 2022

Waunakee Community School District

Policies of the Board of Education

Series 800: School-Community Relations

SALES/ADVERTISING – EXCEPTIONS

851-Rule

The Waunakee Community School District Board of Education will allow the sales/solicitations in schools of the following products or materials under the conditions outlined below.

Class Rings/Graduation Materials/Letter Jackets/Yearbooks/Videotaping and Video Highlights

At least every three years the principal shall contact major vendors that supply the above products and establish a process that shall review the products, services and costs. The principal shall involve students, parents and staff in this process. Acceptable vendors shall be invited to bid on providing the service/product to students in the school. Advertising of the selected product/service shall be allowed and students may order/purchase these products at school during non-class time. All checks/money orders shall be made out to the vendor (with the exception of the yearbook). Parents and students are to be made aware that these products may be available outside of school from other vendors. They are also to be notified that this service is to be provided as a convenience and is not to be seen as an endorsement of a specific product.

School Photos

See Board Policy 492.

Book Clubs

Each building principal has the option of providing book club access to parents/students through the school. Each year the principal with his/her staff shall select one book club vendor that all teachers will utilize. No other clubs will be utilized. The selected book club shall, if at all possible, not offer incentives to students to make purchases. Clubs that emphasize reading material and those that do not offer posters, videos and ‘club’ subscriptions shall be selected if at all possible.

Book club solicitations/orders shall be made no more than six (6) times annually. All funds and orders shall follow prescribed district purchase procedures and be processed through the building office and business office. All “points”, “bonus books” or other incentives shall be accumulated by the school, not individual teachers, and the principal shall determine how these will be utilized on a school-wide basis. Parents and students shall be informed that participation is voluntary. Teachers should make every effort to minimize “peer pressure” to purchase from the club.

Scoreboards

The school **District Administrator** ~~superintendent~~ may allow advertising on scoreboards if the scoreboard is donated by the advertiser. Advertising shall consist of a small portion of the scoreboard’s total surface space.

Warrior Media

The Warrior Media program produces content of various District activities. Sponsorships and/or advertising shall be permitted on Warrior Media programing, with the exception of prohibited advertising per board policy.

Cross Ref.: 374, Student Fundraising Activities
 492, School Photographs
 524.1, Staff Conflicts of Interest
 672.4, Vendor Relations
 840, Public Gifts to the Schools
 850, Sales and Solicitations
 851, Advertising in the Schools

Adopted: December 1996

Revised: July 2002

Waunakee Community School District

VISITORS TO THE SCHOOLS DURING THE SCHOOL DAY

Waunakee Community School District

Policy 860

Page 1 of 2

~~*(This sample policy (1) requires all visitors to the school during the school day to stop in the school office to receive authorization to be in the school building; and (2) assigns responsibility to the building principal to provide such authorization. The policy also includes specific information regarding board member visits to the schools during the school day, and information regarding the presence of registered sex offenders on school premises. This sample policy is intended to coordinate with 860 Sample Rule 1.)*~~

Many individuals may want to enter school buildings during the school day for a variety of reasons. The District, however, has a responsibility to protect the safety of students, staff and others while they are in school buildings and to make sure the educational process is not disrupted.

Since the building principal is responsible for helping ensure the safety of all persons in the school and for maintaining a school environment conducive to learning, all visitors are expected to report to the school office for a visitor's pass before going anywhere in the building during the school day. Determination or disposition of an individual's request to visit the school will be made by the building principal or his/her designee in accordance with administrative procedures currently in force. The building principal may designate exceptions to the requirement that visitors report and register in the school office in connection with a school performance, assembly, or similar event that is open to members of the public and that occurs during the school day. Other exceptions may also be authorized by the District Administrator.

For purposes of this policy and its implementing procedures, any person other than a District student or a District employee who is present on school premises is regarded as a visitor. Visitors may include parents and guardians of students, School Board members, school volunteers, invited speakers, vendors, representatives of the news media, students not enrolled in or attending courses in the _____ Waunakee Community School District, interested citizens, etc.

State law specifically prohibits registered sex offenders from being on public school premises unless they have provided the required prior notification to school officials or fall under one of the exceptions provided by law. It is the responsibility of the registered sex offender to provide the required school notification. After receiving the required prior notification, the building principal shall determine whether the registered sex offender will be allowed to be present on school premises for the proposed purpose or event and determine any conditions that may be placed on such permission for the safety of other persons present in the school environment.

Regardless of the time of day, the District Administrator or any building principal or his/her designee has the discretionary authority to exclude from the school premises any person who the District determines has no legitimate and approved purpose for being on school grounds, disrupts or appears likely to become a disruption to the educational program, or threatens the health or safety of students, staff or others in the school. Any such individual shall be directed to leave the school premises immediately and law enforcement authorities may be called if necessary.

[Board Member Visits](#)

VISITORS TO THE SCHOOLS DURING THE SCHOOL DAY

Policy 860

Waukeke Community School District

Page 2 of 2

Board members are encouraged to visit the schools. Individual Board members are required to arrange visits to the schools in advance by contacting the identify the appropriate position(s) – e.g., District Administrator and the building principal, except in situations where (1) the Board has specifically approved or directed the visit; or (2) the Board member is visiting a school in his/her capacity as a parent of a student in the school, in which case the request will be treated in the same manner as other parent requests. Visits by Board members shall be regarded as informal expressions of interest in the schools visited and not as inspections or visits for supervisory purposes. If an individual Board member and the administration are unable to address a request for a school visit to their mutual satisfaction, the individual Board member may ask the Board to evaluate his/her request.

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Legal References:

Wisconsin Statutes

- [Section 118.07\(4\)](#) [school safety plans]
- [Section 120.12\(1\)](#) [school board duty; care, control and management of school district property]
- [Section 120.13\(35\)](#) [school board power; authority to set rules governing individuals' presence in school buildings]
- [Section 120.44\(2\)](#) [school board powers and duties; unified school districts – *include this reference only if classified as a unified school district*]
- [Section 121.02\(1\)\(f\)](#) [school district standard; provide safe and healthful facilities]
- [Section 301.475](#) [sex offender's presence on school premises; school administrator notification required]

Cross References:

- WASB PRG 860 Sample Policy 1
- [720, District Safety](#)
- [731, Buildings and Grounds](#)
- [832, Public Conduct on School Property](#)
- [860-Rule, Visitors to the Schools Procedures](#)

Adoption Date: 2/14/83

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Revised: 5/11/92
March 1994
July 2002

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VISITORS TO THE SCHOOLS PROCEDURES

Waukegan Community School District

860-Rule

Page 1 of 4

~~(This sample rule (1) outlines requirements for school visitors when entering a school building during the school day and general expectations of visitors while they are in a school building; (2) outlines special school notification requirements for registered sex offenders; and (3) provides guidance to building principals when making decisions regarding visitor access to certain rooms and areas within the school. This sample rule is intended to coordinate with 860 Sample Policy 1.)~~

A. General Requirements for Visitors to School during the School Day

1. Persons wishing to visit the schools are strongly encouraged to make advance arrangements for their proposed visit with the appropriate teacher and/or building principal so that the request can be sufficiently evaluated and so that arrangements to facilitate an approved visit can be made.
2. All visitors shall report to the school office when either arriving or leaving the school during the school day. Notices shall be displayed prominently in each building indicating that all visitors are required to register with the school office and to obtain authorization from the building principal or his/her designee to remain in the school. All approved visitors shall be given a visitor's pass and will be expected to have it prominently displayed while in the school or on school premises. The standard procedures for visitor reporting and/or registration during the school day may be modified or suspended in the following circumstances:
 - (a) In connection with a school performance, assembly, or similar event that is open to members of the public where signage or other communications from the school indicate that the building principal has permitted an exception for the event. Visitors attending an exempted event shall confine their visit to times and locations within the building that are appropriate for the event.
 - (b) ~~Except as otherwise directed by the building principal, the parent, guardian, or other responsible adult who is bringing a student to school in insert relevant grade levels e.g. "kindergarten through grade 4" may accompany his/her child to the student's locker area or classroom entryway prior to the scheduled start of the instructional day for students, provided that the accompanying adult immediately leaves the building prior to the scheduled start of school.~~
 - ~~(c) The principal may excuse trades people who make regular visits to the school building from the obligation of registering with the school office.¹~~
 - ~~(e)(g) Insert any other known exceptions applicable within your district. If a school district has no applicable exceptions that it can identify, delete the last sentence of subsection 2 of this sample rule, as well as paragraphs 2(a) to 2(c).~~
3. Visits may be prohibited at certain times such as the first and last weeks of school, immediately before or after vacations or other breaks, and while standardized testing or other student assessments are being conducted.

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¹ This is from current 860 rule paragraph 1.

VISITORS TO THE SCHOOLS PROCEDURES

860-Rule

Waukegan Community School District

Page 2 of 4

4. When determining whether a visitor's self-initiated request to visit a school or a class is excessive, intrusive, or otherwise disruptive to school operations, the building principal may consider the number of visits that have been made by any single person, the total number of visitors who may be present at any one time, and the aggregate number of visits occurring in close proximity (e.g., during the same week).

4. If conflicts occur because of the number of visitor requests or other circumstances, parents and guardians of currently enrolled students will generally be given preference.

6. All school visitors must comply at all times with School Board policies and school rules.

7. Any visitor with a disability, or a person assisting a visitor with a disability, who may need the District to provide an accommodation in connection with a visit to a school should address his/her situation in advance with the building principal.

B. Special Requirements Related to Registered Sex Offenders Visiting the Schools

1. State law specifically prohibits any registered sex offender from being on any school premises associated with a public school unless they have notified the ~~identify the appropriate position – e.g., District Administrator or designee; building principal or designee~~ of the specific date, time, and place of the visit and of their status as a registered sex offender. It is the sex offender's responsibility to provide this required notification every time they are planning to come on school premises, except under the circumstances described in paragraphs (1)(a) through (d) below. "School premises" include any school building, grounds, recreation area or athletic field or any other property owned, used or operated for school administration. Once this school notification has been made, the ~~designated school official(s)~~ may take such additional precautions as may be necessary to help ensure the safety of students, staff and others that may be present on school premises at the time of the visit.

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a. A registered sex offender who is the parent of a child enrolled at the school is not subject to the above special school notification requirement if the person notifies the ~~staff position designated above~~ at the beginning of each academic school year that he/she is a registered sex offender and that he/she has a child enrolled at the school. If the child is not enrolled at the beginning of the school year, this notification must be made when the child is first enrolled. If the person is not subject to the registered sex offender reporting requirements at the beginning of the school year or when the child first enrolled, this notification must be made when the person first becomes subject to the sex offender reporting requirements.

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b. A registered sex offender who is a student enrolled at the school is not subject to the above special school notification requirement if the department, agency or person supervising the student under a dispositional order has worked with school officials to help ensure the safety of the students attending the school with the student.

c. A registered sex offender who is on the school premises to vote is not subject to the above special school notification requirement if an election is being held that day and the person's polling place is on the school premises.

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d. A registered sex offender who is on the school premises to attend an event or activity that is not sponsored by the school is not subject to the above special school notification requirement.

2. In addition to providing the special school notifications outlined above, registered sex offenders visiting the schools must abide by the other requirements outlined in Board policy and this rule, as applicable, similar to other visitors to the schools during the school day. Further, an individual's status as a registered sex offender may preclude the person from being granted permission to be present on school premises (e.g., as a school volunteer).

C. Visitors to Classrooms or Other Instructional Areas

1. Access to particular classrooms or other instructional areas of the school may be restricted upon the recommendation of the teacher in charge or as otherwise deemed necessary by the building principal.
2. Visitors in areas where students are present shall not take any pictures or make or transmit any recording unless the visitor has received advance permission from the teacher or building principal.
3. Because classrooms and other instructional areas are the most vulnerable to disruption, specific conditions, which may vary by the classification of the visitor (e.g., parent, non-parent, etc.), may be imposed upon visitors, including but not limited to:
 - (a) remaining in a designated place or seat.
 - (b) refraining from speaking to students while the class or activity is in session.
 - (c) refraining from entering or leaving the area while an activity is underway.
 - (d) requiring that the dress and grooming of the visitor be consistent with the dress code for the students and employees within the building.
 - (e) requiring that the visitor be chaperoned.
 - (f) limiting the duration of the visit to particular times or length of time.
 - (g) limiting the activities of the visitor to a particular purpose(s).
 - (h) designating particular routes of travel in the building or upon the school grounds.
4. Visitors wishing to conference with teachers or administrators during the course of the school day are encouraged to make arrangements as far in advance as practical. As the period of time between the request and the proposed conference or other meeting gets shorter, it becomes increasingly less likely that staff members will be able to accommodate the request.

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D. Student Visitors

All requirements for visitors apply to students who are not enrolled in the _____
Waunakee Community School District or attending individual courses in schools in the District,
with additional considerations
to be applied at the discretion of the building principal. Under most circumstances, student
visitors are discouraged.

Cross References:

WASB PRG 860 Sample Rule 1

Adoption Date: 2/14/83

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Revised: 5/11/92
March 1994

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SEATING AT PUBLIC EVENTS

862

It is the intention of the Waunakee Community School District Board of Education to provide equal access to seating at student performances, activities and contests that are open to the public. This applies to both events that are free and for those for which there is a charge.

Seats at public events shall be available on a “first come, first served” basis. There shall be no “saving of seats” prior to the event by the placement of signs, articles such as blankets, or by the use of tape. The doors or gates to the venues holding school events shall be opened at a reasonable time prior to the event to allow spectators to enter without being hurried or rushed. Generally, this will be one hour prior to the event, but this may be altered by the administrator in charge of the event with prior notice to the public.

The event’s administrator shall use discretion in implementing the provisions of this policy.

Exceptions to this policy are:

- When seats are sold on a numbered or reserved basis in advance. These tickets will be sold on a first come, first served basis with notice of the date and time the tickets go on sale.
- Seats are to be reserved for the handicapped. These will be reserved for them and one or two family members or companions.
- Seats designated by the administrator in charge for event workers or staff.

Adopted: October 1999

Waunakee Community School District