

FINANCE/PERSONNEL COMMITTEE

REGULAR MEETING

Village of Somerset

Thursday, May 7, 2026

5:00 P.M.

{Donnie Kern, Caleb Garn and Jessica Plourde}

Notice-A quorum of the Village Board may be present

Meeting to be held at the Village Hall, 110 Spring Street, Somerset WI 54025

You may watch the meeting on our [YouTube channel @villageofsomersetwi](#)

1. Finance/Personnel Meeting called to order
2. Public Comment on Agenda Items (2 minutes per person/14 minutes per topic)
3. Minutes: February 5th Meeting
4. Library Report
5. Impact Fee Report & Building Permits
6. Department Head Meeting Report
7. 2026 Budget to Date
8. New Business:
 - a. Discussion/Possible Recommendation: Electronic Storage of Records
 - b. Discussion/Possible Recommendation: Fire Protection Charges
9. Unfinished Business:
 - a. Discussion/Possible Recommendation: Employee Concern Policy
10. Convene to closed session as per Wis Stat 19.85 (1)(c) Considering evaluation data of any public employee over which the governmental body has jurisdiction or exercises responsibility-Review of Goals for Department Heads
11. Reconvene to open session and take action on closed session item if necessary
12. Future Agenda Items
13. Adjourn

FINANCE/PERSONNEL COMMITTEE MEETING
Thursday, February 5, 2026

President Kern called the Finance/Personnel meeting to order at 5:00 p.m. Present: Caleb Garn and Donnie Kern at the Village Hall and Jessica Plourde via Zoom.

Also present: Trustee Janna Stewart and Clerk Jessica Lehman at the Village Hall; Library Director Kristina Johnson-Kelley via Zoom.

Public Comment on Agenda Items: None

Minutes: *Motion by Garn, second by Plourde to approve the minutes of October 21st and October 30th and motion carried.*

Library Report: Kristina provided the February Library Report highlighting the many programs the library is offering during the month. The committee recognized the library staff for all the wonderful work they do.

Impact Fee Report: Forty-six (46) impact fees were collected in 2025.

Department Head Meeting Report: The committee reviewed the February 4th meeting report.

2025 Budget Review: Committee reviewed the budget.

New Business:

Discussion/Possible Recommendation-Library Request to Use Impact Fees: Kristina provided a request to use impact fee funds for audiovisual equipment upgrades in the meeting rooms at the library. *Motion by Garn, second by Plourde to recommend approval of the quote from Audio Architects in the amount of \$11,638.21 and motion carried.*

Discussion/Possible Recommendation-Anderson Heating Proposal, Furnace at Village Hall: *Motion by Kern, second by Garn to recommend approval of the furnace quote from Anderson Heating in the amount of \$5,539 and motion carried.*

Discussion-Employee Review Process: The committee reviewed the current performance evaluation process. Discussion amongst the committee to switch to a goal setting review process. Department heads are asked to set a minimum of 2 goals and the committee will review job descriptions as well. The expectation is to have goals submitted by May 1st for review at the May committee meeting.

Discussion/Possible Recommendation-Employee Concern Policy: Kern stated he asked the attorney to draft this policy to ensure there is a reporting procedure for employees. The committee also reviewed comments on the policy from Pete Whiteneck, JA Counter HR consultant. The committee will review and bring it back to the March meeting.

Discussion/Possible Recommendation: Board Member Access Policy: Kern stated he asked the attorney to draft this policy. The committee will review and bring it back to the next meeting.

Future Agenda Items: Review of building permits monthly

Adjourn: *Motion by Garn, second by Plourde to adjourn and motion carried.* The Finance/Personnel Committee meeting adjourned at 5:53 p.m.

Andrea Otto, Village Treasurer



LIBRARY UPDATE FOR MAY 2026

208 Hud Street

(715) 247-5228

somersestlibrary.org



LIBRARY RECEIVES NATIONAL GRANT FOR SMALL AND RURAL LIBRARIES **\$20,000 Grant Will Help the Library Work with Residents with Disabilities**

Learn more about the library's offerings by subscribing to the newsletter



Remarkable Raptors on Your Day Off!

Friday, May 1

Join us for a day of bird-themed activities and a presentation from Wildlife Science Center with live raptors!



Book Discussion at the Brewery **Tuesday, May 19th, 6:00 PM**

Join in a lively book discussion while enjoying a cold one! This month we will be reading *The Chosen* and *The Beautiful* by Nghi Vo.



Make Your Own Boba Tea **Wednesday May 27, 1:00- 2:00 PM** **Thursday May 28, 4:30- 5:30 PM**

Discover the delicious history of Boba Tea while crafting your own signature drink from scratch.

Questions? Contact: Kristina Kelley-Johnson, Library Director
(715) 247-5228 • kristina@somersestlibrary.org

				Water	wer												
	Paid	Payee	Address	System	an	Streets	Parks	Police	Library	Fire	Total	Receipt #	sf	Permit #			
1	2/4/26	Capstone	972 Willow Glen Ave	\$ 1,690.00		\$ 993.00		\$ 898.55	\$ 171.35	\$ 192.34	\$ 3,945.24	109157		26-102			
2	2/4/26	Capstone	974 Willow Glen Ave	\$ 1,690.00		\$ 993.00		\$ 898.55	\$ 171.35	\$ 192.34	\$ 3,945.24	109158		26-103			
3	3/2/26	Capstone	968 Willow Glen Ave	\$ 1,690.00		\$ 993.00		\$ 898.55	\$ 171.35	\$ 192.34	\$ 3,945.24	109638		26-105			
4	3/2/26	Capstone	970 Willow Glen Ave	\$ 1,690.00		\$ 993.00		\$ 898.55	\$ 171.35	\$ 192.34	\$ 3,945.24	109639		26-106			
5	3/6/26	Capstone	999 Willow Glen Ave	\$ 1,690.00		\$ 993.00		\$ 898.55	\$ 171.35	\$ 192.34	\$ 3,945.24	109713		26-122			
6	3/6/26	Capstone	906 Pine Vale Ave	\$ 1,690.00		\$ 993.00		\$ 898.55	\$ 171.35	\$ 192.34	\$ 3,945.24	109714		26-121			
7	3/13/26	Capstone	994 Willow Glen Ave	\$ 1,690.00		\$ 993.00		\$ 898.55	\$ 171.35	\$ 192.34	\$ 3,945.24	109875		26-113			
8	3/13/26	Capstone	992 Willow Glen Ave	\$ 1,690.00		\$ 993.00		\$ 898.55	\$ 171.35	\$ 192.34	\$ 3,945.24	109876		26-112			
9	3/13/26	Capstone	998 Willow Glen Ave	\$ 1,690.00		\$ 993.00		\$ 898.55	\$ 171.35	\$ 192.34	\$ 3,945.24	109877		26-114			
10	3/18/26	Capstone	996 Willow Glen Ave	\$ 1,690.00		\$ 993.00		\$ 898.55	\$ 171.35	\$ 192.34	\$ 3,945.24	109994		26-124			
11	3/23/26	CapVest	761 Parent St	\$ (5,070.00)		\$ (7,649.28)		\$ (3,476.83)	\$ (514.05)	\$ (744.22)	\$ (17,454.38)	110139		25-198			
12	3/23/26	CapVest	763 Parent St	\$ 13,520.00		\$ 442.08		\$ 5,567.35	\$ 1,370.80	\$ 1,191.74	\$ 22,091.97	110140		25-214			
13	3/23/26	CapVest	764 Meridian St	\$ 13,520.00		\$ 442.08		\$ 5,567.35	\$ 1,370.80	\$ 1,191.74	\$ 22,091.97	110141		25-223			
14	3/23/26	CapVest	759 Parent St	\$ 8,450.00		\$ 294.72		\$ 3,711.57	\$ 856.75	\$ 794.50	\$ 14,107.54	110142		25-242			
15	3/23/26	CapVest	757 Parent St	\$ 8,450.00		\$ 294.72		\$ 3,711.57	\$ 856.75	\$ 794.50	\$ 14,107.54	110143		26-109			
16	3/26/26	Preferred Builders	837 Sutherland St	\$ 1,690.00		\$ 993.00		\$ 898.55	\$ 171.35	\$ 192.34	\$ 3,945.24	110189		26-116			
17	3/26/26	Preferred Builders	873 Sutherland St	\$ 1,690.00		\$ 993.00		\$ 898.55	\$ 171.35	\$ 192.34	\$ 3,945.24	110190		26-120			
18	4/6/26	CapVest	765 Meridian St	\$ 13,520.00		\$ 442.08		\$ 5,567.35	\$ 1,370.80	\$ 1,191.74	\$ 22,091.97	110335		26-123			
19	4/15/26	Preferred Builders	861 Sutherland	\$ 1,690.00		\$ 993.00		\$ 898.55	\$ 171.35	\$ 192.34	\$ 3,945.24	110548		26-117			
20	4/15/26	Preferred Builders	857 Sutherland	\$ 1,690.00		\$ 993.00		\$ 898.55	\$ 171.35	\$ 192.34	\$ 3,945.24	110549		26-118			
21	4/15/26	Preferred Builders	869 Sutherland	\$ 1,690.00		\$ 993.00		\$ 898.55	\$ 171.35	\$ 192.34	\$ 3,945.24	110550		26-119			
22	4/20/26	CapVest	767 Meridian St	\$ 13,520.00		\$ 442.08		\$ 5,567.35	\$ 1,370.80	\$ 1,191.74	\$ 22,091.97	110608		26-146			
23	4/23/26	Capstone	966 Willow Glen Ave	\$ 1,690.00		\$ 993.00		\$ 898.55	\$ 171.35	\$ 192.34	\$ 3,945.24	110779		26-138			
24	4/23/26	Capstone	981 Willow Glen Ave	\$ 1,690.00		\$ 993.00		\$ 898.55	\$ 171.35	\$ 192.34	\$ 3,945.24	110780		26-139			
25	4/23/26	Capstone	976 Willow Glen Ave	\$ 1,690.00		\$ 993.00		\$ 898.55	\$ 171.35	\$ 192.34	\$ 3,945.24	110781		26-147			
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41											\$ -						
42											\$ -						
43											\$ -						

	Paid	Payee	Address	Water System	Water Main	Streets	Parks	Police	Library	Fire	Total	Receipt #	sf	Permit #
44											\$ -			
45											\$ -			
46											\$ -			
47											\$ -			
		Total		\$ 96,330.00		\$ 12,582.48	\$ -	\$ 42,389.61	\$ 9,766.95	\$ 9,073.86	\$ 170,142.90			
				28%		46%	0%	11%	10.0%	5.0%				
		2026 Interest												
				\$ 96,330.00		\$ 12,582.48	\$ -	\$ 42,389.61	\$ 9,766.95	\$ 9,073.86	\$ 170,142.90			
	2025 Ending Balance			\$ 343,285.29		\$ 248,722.86	\$ 68.49	\$ 133,175.57	\$ 63,084.73	\$ 39,568.51	\$ 827,905.45			
	2026 Fund Balance	Total		\$ 439,615.29		\$ 261,305.34	\$ 68.49	\$ 175,565.18	\$ 72,851.68	\$ 48,642.37	\$ 998,048.35			
	2026 Expenses										\$ -			
											\$ -			
											\$ -			
											\$ -			
											\$ -			
		Total Expense		\$ -		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -			
		Year end Balance		\$ 439,615.29		\$ 261,305.34	\$ 68.49	\$ 175,565.18	\$ 72,851.68	\$ 48,642.37	\$ 998,048.35			

Village of Somerset
BUILDING INSPECTOR'S REPORT
FOR THE MONTH OF MARCH 2026

<u>PERMIT #</u>	<u>APPLICANT</u>	<u>ADDRESS</u>	<u>PROJECT</u>	<u>VALUE</u>	<u>FEE</u>	<u>ADMIN FEE</u>
26-104	Timothy Hyde	207 Red Pine Drive	Storage Shed	\$7,000.00	\$170.00	\$25.00
26-105	Capstone Homes	968 Willow Glen Avenue	New Home	\$348,290.00	\$1,788.00	\$75.00
26-106	Capstone Homes	970 Willow Glen Avenue	New Home	\$354,385.00	\$1,812.00	\$75.00
26-108	Eli Thompson	837 Juniper Drive	Alteration	\$44,781.00	\$322.00	\$25.00
26-110	Paul Sheley	453 Alex Court	Alteration	\$20,000.00	\$322.00	\$25.00
26-111	Preston Paulson	336 Aspen Drive	Alteration	\$32,000.00	\$370.00	\$25.00
26-112	Capstone Homes	992 Willow Glen Avenue	New Home	\$348,530.00	\$1,788.00	\$75.00
26-113	Capstone Homes	994 Willow Glen Avenue	New Home	\$348,290.00	\$1,788.00	\$75.00
26-114	Capstone Homes	998 Willow Glen Avenue	New Home	\$570,400.00	\$2,676.00	\$75.00
26-115	Rapid Marine	102 Aspen Drive	Sign	\$5,000.00	\$90.00	\$25.00
26-116	Preferred Builders	837 Sutherland Street	New Home	\$298,460.00	\$1,588.00	\$75.00
26-120	Preferred Builders	873 Sutherland Street	New Home	\$269,800.00	\$1,472.00	\$75.00
26-121	Capstone Homes	906 Pine Vale Avenue	New Home	\$570,400.00	\$2,676.00	\$75.00
26-122	Capstone Homes	999 Willow Glen Avenue	New Home	\$481,400.00	\$2,320.00	\$75.00
26-124	Capstone Homes	996 Willow Glen Avenue	New Home	\$331,075.00	\$1,720.00	\$75.00
26-125	Chris Ide	845 Sutherland Street	Deck	\$26,400.00	\$200.00	\$25.00
26-126	Village of Somerset	270 Main Street	Raze	\$5,000.00	\$0.00	\$0.00
26-127	Village of Somerset	302 Main Street	Raze	\$5,000.00	\$0.00	\$0.00
26-128	Jeff Handevidt	809 Fox River Road	Deck	\$31,000.00	\$200.00	\$25.00
26-129	Michael Kovs	827 Jack Pine Trail	Alteration	\$4,776.00	\$262.00	\$25.00
26-130	Kristi McGuire	332 Harriman Street	Alteration	\$21,422.00	\$330.00	\$25.00
26-131	Terry Melhorn	567 Somerset Lane	Alteration	\$6,631.00	\$270.00	\$25.00
26-132	Deb Busson	442 Meadow Lane	Fence	\$5,000.00	\$90.00	\$25.00
26-135	Jonathan Shir	547 LaGrandeur Road	Deck	\$30,000.00	\$200.00	\$25.00
26-136	Paige Schutt	400 Bruce Larson Way	Fence	\$5,000.00	\$200.00	\$25.00

<u>OTAL PERMITS 25</u>			<u>TOTAL</u>	<u>TOTAL</u>	<u>TOTAL</u>
10 NEW HOMES	0 COMMERCIAL		\$4,170,040.00	\$22,654.00	\$1,075.00
1 STORAGE SHED	2 FENCE				
3 DECK(S)	0 REPAIR(S)				
0 ADDITION	0 PORCH				
0 FIREPLACE	0 ELECTRIC				
6 ALTERATION	2 RAZE				
0 HVAC	1 SIGNS				

DRIVEWAY PERMITS

			<u>FEE</u>	
26-105	Capstone Homes	968 Willow Glen Avenue	\$90.00	-
26-106	Capstone Homes	970 Willow Glen Avenue	\$90.00	-
26-112	Capstone Homes	992 Willow Glen Avenue	\$90.00	-
26-113	Capstone Homes	994 Willow Glen Avenue	\$90.00	-
26-114	Capstone Homes	998 Willow Glen Avenue	\$90.00	-
26-116	Preferred Builders	837 Sutherland Street	\$90.00	-
26-120	Preferred Builders	873 Sutherland Street	\$90.00	-
26-121	Capstone Homes	906 Pine Vale Avenue	\$90.00	-
26-122	Capstone Homes	999 Willow Glen Avenue	\$90.00	-
26-124	Capstone Homes	996 Willow Glen Avenue	\$90.00	-
			<u>TOTAL</u>	-
			\$900.00	

OTAL PERMITS 10

Village of Somerset

Administrative Fee \$1,075.00
 FINES \$0.00

TOTAL **\$1,075.00**

Inspection Agency

FEES \$22,654.00
 10 DRIVEWAY PERMI \$900.00
 10 SEAL @ \$40 \$400.00

TOTAL **\$23,954.00**

Village of Somerset
BUILDING INSPECTOR'S REPORT
FOR THE MONTH OF APRIL 2026

<u>PERMIT #</u>	<u>APPLICANT</u>	<u>ADDRESS</u>	<u>PROJECT</u>	<u>VALUE</u>	<u>FEE</u>	<u>ADMIN FEE</u>
26-109	L-45 Somerset	757 Parent Street	Commercial	\$1,063,781.00	\$4,664.00	\$75.00
26-117	Preferred Builders	861 Sutherland Street	New Home	\$273,090.00	\$1,488.00	\$75.00
26-118	Preferred Builders	857 Sutherland Street	New Home	\$296,890.00	\$1,580.00	\$75.00
26-119	Preferred Builders	869 Sutherland Street	New Home	\$291,760.00	\$1,560.00	\$75.00
26-123	L-45 Somerset	765 Meridian Street	Commercial	\$1,381,695.00	\$5,920.00	\$75.00
26-133	Lance Premeau	553 LaGrandeur Road	Deck	\$30,000.00	\$200.00	\$25.00
26-134	Amanda Christianse	532 LaGrandeur Road	Deck	\$10,500.00	\$200.00	\$25.00
26-135	Matt Damberg	527 LaGrandeur Road	Deck	\$19,500.00	\$200.00	\$25.00
26-137	Marjorie Metzdrorf	798 Plum Tree Lane	Alteration	\$3,852.00	\$158.00	\$25.00
26-138	Capstone Homes	966 Willow Glen Avenue	New Home	\$354,385.00	\$1,812.00	\$75.00
26-139	Capstone Homes	981 Willow Glen Avenue	New Home	\$297,235.00	\$1,584.00	\$75.00
26-140	Tyler Young	332 Aspen Drive	Deck	\$7,000.00	\$200.00	\$25.00
26-141	Alan Williams	307 Sunrise Drive	Fence	\$5,000.00	\$90.00	\$25.00
26-142	Dennis Renstrom	531 LaGrandeur Road	Deck	\$42,100.00	\$200.00	\$25.00
26-143	Andrew Krinke	905 Pine Vale Avenue	Deck	\$8,000.00	\$200.00	\$25.00
26-146	L-45 Somerset	767 Meridian Street	Commercial	\$1,439,835.00	\$6,152.00	\$75.00
26-147	Capstone Homes	976 Willow Glen Avenue	New Home	\$349,000.00	\$1,788.00	\$75.00
26-148	Mike Heller	533 LaGrandeur Road	Deck	\$5,760.00	\$200.00	\$25.00
26-149	Jonathan Shir	547 LaGrandeur Road	Fence	\$5,000.00	\$90.00	\$25.00
26-154	Elizabeth Evenocher	450 White Pine Lane	Fence	\$5,000.00	\$90.00	\$25.00
26-157	Morgan Koopmeiner	302 Willow Street	Fence	\$5,000.00	\$90.00	\$25.00

TOTAL PERMITS 21

6 NEW HOMES	3 COMMERCIAL
0 STORAGE SHED	4 FENCE
7 DECK(S)	0 REPAIR(S)
0 ADDITION	0 PORCH
0 FIREPLACE	0 ELECTRIC
1 ALTERATION	0 RAZE
0 HVAC	0 SIGNS

<u>TOTAL</u>	<u>TOTAL</u>	<u>TOTAL</u>
\$5,894,383.00	\$28,466.00	\$975.00

RECEIVED

MAY 05 2026

VILLAGE OF SOMERSET

DRIVEWAY PERMITS

			<u>FEE</u>
26-109	L-45 Somerset	757 Parent Street	\$90.00
26-117	Preferred Builders	861 Sutherland Street	\$90.00
26-118	Preferred Builders	857 Sutherland Street	\$90.00
26-119	Preferred Builders	869 Sutherland Street	\$90.00
26-123	L-45 Somerset	765 Meridian Street	\$90.00
26-138	Capstone Homes	966 Willow Glen Avenue	\$90.00
26-139	Capstone Homes	981 Willow Glen Avenue	\$90.00
26-146	L-45 Somerset	767 Meridian Street	\$90.00
26-147	Capstone Homes	976 Willow Glen Avenue	\$90.00

TOTAL
\$810.00

TOTAL PERMITS 9

Village of Somerset

Administrative Fee	\$975.00
FINES	\$0.00
<u>TOTAL</u>	<u>\$975.00</u>

Inspection Agency

FEES	\$28,466.00
9 DRIVEWAY PERMIT	\$810.00
6 SEAL @ \$40	\$240.00
<u>TOTAL</u>	<u>\$29,516.00</u>

Unposted Included

Fund: 100 - VILLAGE GENERAL FUND

Account Number		2026 April	2026 Actual 04/30/2026	2026 Budget	Budget Status	% of Budget
100-00-41110-000-000	VILLAGE TAX LEVY	0.00	0.00	1,654,618.07	-1,654,618.07	0.00
100-00-41150-000-000	MANAGED FOREST LAND TAX	0.00	0.00	167.02	-167.02	0.00
100-00-41210-000-000	HOTEL ROOM TAX	0.00	104.31	0.00	104.31	0.00
TAX LEVY		0.00	104.31	1,654,785.09	-1,654,680.78	0.01
100-00-43410-000-000	STATE SHARED TAXES	0.00	0.00	321,755.90	-321,755.90	0.00
100-00-43420-000-000	STATE FIRE INS TAX REVENUE	0.00	0.00	22,306.00	-22,306.00	0.00
100-00-43430-000-000	COMPUTER EXEMPTION	0.00	0.00	4,483.50	-4,483.50	0.00
100-00-43431-000-000	STATE AID-VIDEO SERVICE AID	0.00	0.00	1,290.46	-1,290.46	0.00
100-00-43435-000-000	STATE AID-PERSONAL PROPERTY	0.00	0.00	44,594.34	-44,594.34	0.00
100-00-43531-000-000	STATE AID FOR LOCAL STREETS	0.00	0.00	191,095.55	-191,095.55	0.00
100-00-43580-000-000	HOUSING GRANT	0.00	-6,598.11	0.00	-6,598.11	0.00
100-00-43650-000-000	Managed Forest Land	0.00	0.00	3.52	-3.52	0.00
100-00-43790-000-000	ST CROIX CTY LIBRARY FUNDING	0.00	197,297.83	197,297.00	0.83	100.00
100-00-43791-000-000	CTY TRAINING REIMB-LAW ENF	0.00	818.86	0.00	818.86	0.00
INTERGOVERNMENTAL REVENUES		0.00	191,518.58	782,826.27	-591,307.69	24.47
100-00-44110-000-000	LIQUOR & MALT LICENSES	15,725.00	15,735.00	5,745.00	9,990.00	273.89
100-00-44121-000-000	OPERATOR LICENSES	310.00	330.00	650.00	-320.00	50.77
100-00-44123-000-000	CIGARETTE LICENSES	450.00	450.00	550.00	-100.00	81.82
100-00-44124-000-000	DIRECT SELLERS LICENSES	0.00	20.00	40.00	-20.00	50.00
100-00-44125-000-000	CABLE TV FRANCHISE PERMIT	0.00	0.00	3,500.00	-3,500.00	0.00
100-00-44205-000-000	DOG LICENSES - VILLAGE SHARE	0.00	570.00	670.00	-100.00	85.07
100-00-44210-000-000	DOG LICENSES - SHARE FROM CTY	0.00	287.79	330.00	-42.21	87.21
100-00-44300-000-000	BUILDING PERMIT FEES	28,679.30	67,794.00	100,000.00	-32,206.00	67.79
100-00-44400-000-000	PLAN COMMISSION FEES	200.00	550.00	1,000.00	-450.00	55.00
100-00-44410-000-000	BOARD OF ZONING APPEALS	350.00	350.00	0.00	350.00	0.00
100-00-44900-000-000	SIGN PERMIT FEES	115.00	230.00	115.00	115.00	200.00
LICENSES AND PERMITS		45,829.30	86,316.79	112,600.00	-26,283.21	76.66
100-00-45110-000-000	COURT FINES & COSTS	4,992.68	8,985.10	30,000.00	-21,014.90	29.95
REVENUES		4,992.68	8,985.10	30,000.00	-21,014.90	29.95
100-00-46110-000-000	CLERK'S REVENUE	352.00	497.00	1,750.00	-1,253.00	28.40
100-00-46112-000-000	LICENSE PUBLICATION FEES	130.00	130.00	130.00	0.00	100.00
100-00-46210-000-000	REG & REPORT FEES/RESTITUTION	30.00	187.69	200.00	-12.31	93.85
100-00-46310-000-000	PUBLIC WORKS DEPT. REVENUE	1,000.00	1,100.00	0.00	1,100.00	0.00
100-00-46420-000-000	REFUSE & RECYCLING HAUL REVENU	23,520.99	93,395.17	250,000.00	-156,604.83	37.36
100-00-46710-000-000	LIBRARY FEES & COLLECTIONS	0.00	1,488.47	7,000.00	-5,511.53	21.26
100-00-46721-000-000	ATHLETIC FIELD USE FEES	0.00	0.00	1,500.00	-1,500.00	0.00
PUBLIC CHARGES FOR SERVICES		25,032.99	96,798.33	260,580.00	-163,781.67	37.15
100-00-47322-000-000	POLICE OFFICER WAGE REIMB.	0.00	0.00	56,050.00	-56,050.00	0.00
INTERGOVERNMENT CHARGE SERVICE		0.00	0.00	56,050.00	-56,050.00	0.00
100-00-48110-000-000	INTEREST INCOME	0.00	0.00	25,000.00	-25,000.00	0.00
100-00-48130-000-000	INTEREST INCOME - SPEC ASSESS	0.00	98.01	1,000.00	-901.99	9.80
100-00-48310-000-000	PARK LAND	0.00	44,500.00	0.00	44,500.00	0.00
100-00-48500-000-000	DONATIONS	0.00	0.00	3,800.00	-3,800.00	0.00

Unposted Included

Fund: 100 - VILLAGE GENERAL FUND

Account Number	2026 April	2026 Actual 04/30/2026	2026 Budget	Budget Status	% of Budget
100-00-48920-000-000 GENERAL INSURANCE DIVIDEND	0.00	0.00	4,000.00	-4,000.00	0.00
MISCELLANEOUS REVENUES	0.00	44,598.01	33,800.00	10,798.01	131.95
100-00-49261-000-000 TRANSFER FROM WATER UTILITY	0.00	0.00	111,950.00	-111,950.00	0.00
AMORTIZAION OF CONSTR. GRANTS	0.00	0.00	111,950.00	-111,950.00	0.00
Total Revenues	75,854.97	428,321.12	3,042,591.36	-2,614,270.24	14.08

Unposted Included

Fund: 100 - VILLAGE GENERAL FUND

		2026				
Account Number		2026 April	Actual 04/30/2026	2026 Budget	Budget Status	% of Budget
100-00-51110-110-000	Village Board Salaries	0.00	7,350.03	35,000.00	27,649.97	21.00
100-00-51110-150-000	Village Board Benefits	187.41	562.23	2,700.00	2,137.77	20.82
100-00-51110-390-000	Village Board Other Expenses	7.50	2,193.18	6,500.00	4,306.82	33.74
100-00-51210-111-000	Judge's Salary	0.00	2,500.01	10,000.00	7,499.99	25.00
100-00-51210-121-000	Clerk of Court Wages	4,142.15	14,825.94	56,800.00	41,974.06	26.10
100-00-51210-122-000	Deputy Clerk of Court Wages	70.86	218.49	4,463.00	4,244.51	4.90
100-00-51210-150-000	Court Employee Benefits	3,701.15	12,899.39	43,924.91	31,025.52	29.37
100-00-51210-324-000	Dues, Fees & Training	0.00	1,005.00	2,200.00	1,195.00	45.68
100-00-51210-390-000	Court Other Expenses	49.16	6,890.12	11,420.00	4,529.88	60.33
100-00-51311-210-000	Village Attorney - General	0.00	4,106.75	20,000.00	15,893.25	20.53
100-00-51312-210-000	Village Attorney - Court	0.00	1,793.75	10,000.00	8,206.25	17.94
100-00-51320-210-000	Municipal Code of Ordinances	0.00	2,350.00	2,350.00	0.00	100.00
100-00-51410-110-000	Village President Salary	0.00	2,499.99	10,000.00	7,500.01	25.00
100-00-51410-150-000	Village President Benefits	63.75	191.25	765.00	573.75	25.00
100-00-51420-110-000	Clerk Salary	3,906.94	14,064.91	50,985.48	36,920.57	27.59
100-00-51420-120-000	Treasurer Wages	3,248.58	11,697.90	43,775.52	32,077.62	26.72
100-00-51420-150-000	Admin Employee Benefits	3,167.64	11,190.81	41,176.02	29,985.21	27.18
100-00-51420-321-000	Admin Publishing	122.85	129.47	1,000.00	870.53	12.95
100-00-51420-325-000	Admin Training	0.00	499.00	1,000.00	501.00	49.90
100-00-51420-390-000	Admin Other Expenses	110.40	6,346.61	12,000.00	5,653.39	52.89
100-00-51440-125-000	Elections Part-time Wages	1,641.25	1,641.25	7,800.00	6,158.75	21.04
100-00-51440-390-000	Elections Other Expenses	21.04	396.29	2,500.00	2,103.71	15.85
100-00-51510-210-000	Special Accounting & Auditing	4,000.00	5,000.00	13,700.00	8,700.00	36.50
100-00-51530-210-000	Assessment of Property	0.00	5,112.18	13,800.00	8,687.82	37.04
100-00-51530-390-000	Financial Other Expenses	0.00	0.00	3,150.00	3,150.00	0.00
100-00-51610-120-000	Municipal Building Wages	171.25	685.41	3,500.00	2,814.59	19.58
100-00-51610-150-000	Municipal Bldg Emp Benefits	25.43	112.26	750.00	637.74	14.97
100-00-51610-390-000	Municipal Building Other Exp	3,676.78	10,218.67	28,000.00	17,781.33	36.50
100-00-51930-511-000	Admin Property & Liability Ins	0.00	4,970.50	13,859.00	8,888.50	35.86
100-00-51930-512-000	Admin Worker's Compensation	0.00	99.50	398.00	298.50	25.00
100-00-51930-513-000	Employee Bonds	0.00	675.00	675.00	0.00	100.00
GENERAL GOVERNMENT		28,314.14	132,225.89	454,191.93	321,966.04	29.11
100-00-52110-112-000	Chief's Salary	8,389.48	30,199.59	110,482.00	80,282.41	27.33
100-00-52110-120-002	Wages - 4502	7,873.72	28,345.31	103,752.00	75,406.69	27.32
100-00-52110-120-003	Wages - 4503	6,488.00	24,218.92	84,547.00	60,328.08	28.65
100-00-52110-120-004	Wages - 4504	6,751.96	24,634.54	81,918.00	57,283.46	30.07
100-00-52110-120-005	Wages - 4505	6,270.30	22,886.16	81,788.00	58,901.84	27.98
100-00-52110-120-006	Police Secretary Wages	0.00	0.00	7,000.00	7,000.00	0.00
100-00-52110-120-007	Police Overtime Wages	4,831.21	13,698.51	50,000.00	36,301.49	27.40
100-00-52110-120-009	Part-time Officer Wages	0.00	0.00	10,000.00	10,000.00	0.00
100-00-52110-120-010	Office Summer Help Wages	698.60	1,758.98	0.00	-1,758.98	0.00
100-00-52110-120-011	WAGES - 4506	0.00	1,572.25	16,418.00	14,845.75	9.58
100-00-52110-120-012	WAGES - 4507	3,560.00	12,638.00	70,889.00	58,251.00	17.83
100-00-52110-120-013	WAGES - 4508	0.00	0.00	61,713.00	61,713.00	0.00
100-00-52110-150-000	Police Employee Benefits	16,850.70	59,738.42	257,000.00	197,261.58	23.24
100-00-52110-325-000	Police Training	-255.75	2,467.45	10,000.00	7,532.55	24.67
100-00-52110-351-000	Vehicle Expense	1,860.58	4,522.04	10,000.00	5,477.96	45.22
100-00-52110-390-000	Other Police Expenses	2,300.06	9,757.20	45,000.00	35,242.80	21.68
100-00-52110-391-000	Community Relations	0.00	0.00	1,000.00	1,000.00	0.00
100-00-52210-390-000	Fire Dept Other Expenses	0.00	30,290.50	60,581.00	30,290.50	50.00
100-00-52210-393-000	Fire Dues	0.00	0.00	22,306.00	22,306.00	0.00

Unposted Included

Fund: 100 - VILLAGE GENERAL FUND

		2026				
Account Number		2026 April	Actual 04/30/2026	2026 Budget	Budget Status	% of Budget
100-00-52220-290-000	Hydrant Rental	7,634.34	22,903.02	91,612.00	68,708.98	25.00
100-00-52310-390-000	Rescue Other Expenses	0.00	30,290.50	60,581.00	30,290.50	50.00
100-00-52410-210-000	Building Inspector Services	23,844.00	34,583.00	95,000.00	60,417.00	36.40
100-00-52930-159-000	Uniform Allowance	108.97	1,069.99	5,000.00	3,930.01	21.40
100-00-52930-512-000	Worker's Compensation	0.00	2,185.75	8,743.00	6,557.25	25.00
100-00-52930-515-000	Professional Ins	0.00	2,107.25	8,429.00	6,321.75	25.00
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RADIO EXPENSE		97,206.17	359,867.38	1,353,759.00	993,891.62	26.58
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100-00-53240-120-000	Machinery & Equipment Wages	983.57	3,116.71	5,600.00	2,483.29	55.66
100-00-53240-150-000	Machinery & Equip Emp Benefits	307.37	1,085.63	2,200.00	1,114.37	49.35
100-00-53240-240-000	Machinery & Equip Maint/Repair	1,696.60	7,088.86	23,000.00	15,911.14	30.82
100-00-53240-350-000	Machinery & Equipment Oper Exp	0.00	6,241.73	16,500.00	10,258.27	37.83
100-00-53240-390-000	Machinery & Equip Other Exp	0.00	93.87	150.00	56.13	62.58
100-00-53270-120-000	Garages & Sheds Wages	1,155.89	6,426.53	6,000.00	-426.53	107.11
100-00-53270-150-000	Garages & Sheds Emp Benefits	482.11	2,396.06	1,700.00	-696.06	140.94
100-00-53270-350-000	Garages & Sheds Operating Exp	2,178.42	5,277.73	11,500.00	6,222.27	45.89
100-00-53270-390-000	Garages & Sheds Other Expenses	347.99	1,890.15	2,100.00	209.85	90.01
100-00-53310-110-000	Street Maintenance Salary	124.34	435.19	1,700.00	1,264.81	25.60
100-00-53310-120-000	Street Maintenance Wages	7,575.43	32,180.27	108,000.00	75,819.73	29.80
100-00-53310-150-000	Street Maint Employee Benefits	3,634.94	14,996.17	51,000.00	36,003.83	29.40
100-00-53310-240-000	Street Maintenance & Repairs	0.00	52.50	5,500.00	5,447.50	0.95
100-00-53310-290-000	St Maint Contractual Services	1,621.99	2,295.30	25,000.00	22,704.70	9.18
100-00-53310-350-000	Street Maint Operating Expense	124.81	374.46	1,500.00	1,125.54	24.96
100-00-53310-390-000	Street Maint-Other Expenses	57.86	133.02	1,200.00	1,066.98	11.09
100-00-53320-120-000	Street Cleaning Wages	804.08	1,223.60	6,300.00	5,076.40	19.42
100-00-53320-150-000	Street Cleaning Emp Benefits	434.14	690.26	3,700.00	3,009.74	18.66
100-00-53330-120-000	Snow & Ice Removal Wages	3,633.20	14,901.16	35,000.00	20,098.84	42.57
100-00-53330-150-000	Snow/Ice Removal Emp Benefits	1,277.92	6,127.76	13,000.00	6,872.24	47.14
100-00-53330-240-000	Snow/Ice Removal Maint/Repairs	0.00	0.00	150.00	150.00	0.00
100-00-53330-370-000	Salt & Sand	0.00	14,766.86	24,000.00	9,233.14	61.53
100-00-53330-390-000	Snow/Ice Removal Other Exp	0.00	0.00	200.00	200.00	0.00
100-00-53420-220-000	Street Lighting Utility Svc	4,521.80	14,618.87	48,000.00	33,381.13	30.46
100-00-53420-820-000	Street Lighting Outlay/Improve	0.00	14,875.00	0.00	-14,875.00	0.00
100-00-53430-120-000	Sidewalks Wages	223.14	595.04	1,000.00	404.96	59.50
100-00-53430-150-000	Sidewalks Emp Benefits	59.72	167.79	250.00	82.21	67.12
100-00-53430-240-000	Sidewalks Maint/Repairs	0.00	0.00	4,000.00	4,000.00	0.00
100-00-53440-120-000	Storm Sewer Wages	0.00	598.22	1,500.00	901.78	39.88
100-00-53440-150-000	Storm Sewer Employee Benefits	0.00	139.93	510.00	370.07	27.44
100-00-53440-240-000	Storm Sewer Maint & Repairs	16.48	64.44	500.00	435.56	12.89
100-00-53620-120-000	Refuse Collection Wages	35.84	107.52	3,750.00	3,642.48	2.87
100-00-53620-150-000	Refuse Collection Emp Benefits	24.67	56.25	1,400.00	1,343.75	4.02
100-00-53630-290-000	Solid Waste Disposal Contract	17,651.00	52,881.00	202,000.00	149,119.00	26.18
100-00-53635-120-000	Recycling Wages	0.00	0.00	2,500.00	2,500.00	0.00
100-00-53635-150-000	Recycling Employee Benefits	0.00	0.00	1,300.00	1,300.00	0.00
100-00-53635-290-000	Recycling Contractual Services	4,860.00	14,564.00	56,000.00	41,436.00	26.01
100-00-53640-120-000	Weed Control Wages	0.00	0.00	3,300.00	3,300.00	0.00
100-00-53640-150-000	Weed Control Employee Benefits	0.00	0.00	1,500.00	1,500.00	0.00
100-00-53930-159-000	Public Works Uniform Allowance	383.98	536.94	2,500.00	1,963.06	21.48
100-00-53930-511-000	Public Wks Insurance Expense	0.00	1,760.25	2,849.00	1,088.75	61.78
100-00-53930-512-000	Pub Wks Worker's Compensation	0.00	1,260.50	5,042.00	3,781.50	25.00
100-00-53930-514-000	PW Unemployment Compensation	376.25	376.25	0.00	-376.25	0.00

Unposted Included

Fund: 100 - VILLAGE GENERAL FUND

Account Number	2026 April	2026 Actual 04/30/2026	2026 Budget	Budget Status	% of Budget
OPERATING EXPENSE	54,593.54	224,395.82	682,901.00	458,505.18	32.86
100-00-54110-390-000 Animal Control Other Expenses	54.65	157.85	1,000.00	842.15	15.79
100-00-54610-720-000 Senior Center Donation	0.00	0.00	500.00	500.00	0.00
HEALTH & HUMAN SERVICES	54.65	157.85	1,500.00	1,342.15	10.52
100-00-55110-110-000 Library Director Salary	4,456.56	16,043.57	58,658.08	42,614.51	27.35
100-00-55110-120-000 Library Wages	10,877.88	37,488.95	139,256.64	101,767.69	26.92
100-00-55110-150-000 Library Employee Benefits	4,651.21	16,298.03	56,897.42	40,599.39	28.64
100-00-55110-220-000 Library Utility Expenses	2,029.85	5,528.36	14,636.73	9,108.37	37.77
100-00-55110-290-000 Library Contractual Services	0.00	15,382.24	15,806.00	423.76	97.32
100-00-55110-327-000 Library Workshops	-1,408.80	1,531.20	3,786.98	2,255.78	40.43
100-00-55110-347-000 Library Audio/Video Materials	206.91	699.45	2,997.50	2,298.05	23.33
100-00-55110-348-000 Library Print Materials	772.31	2,146.83	10,800.00	8,653.17	19.88
100-00-55110-349-000 Library E-Materials	0.00	3,839.00	3,859.00	20.00	99.48
100-00-55110-350-000 Library Operating Expense	75.00	2,648.72	9,181.32	6,532.60	28.85
100-00-55110-390-000 Library Supplies	-1,257.82	967.54	6,574.00	5,606.46	14.72
100-00-55110-391-000 Library Programming Supplies	-3,767.03	-2,320.62	9,606.00	11,926.62	-24.16
100-00-55110-392-000 LIBRARY COLLECTION ITEMS	-30.00	50.59	1,500.00	1,449.41	3.37
100-00-55110-511-000 Library Insurance Expense	0.00	1,907.50	2,024.00	116.50	94.24
100-00-55110-512-000 Library Worker's Compensation	0.00	61.00	244.00	183.00	25.00
100-00-55200-110-000 Parks Salary	263.92	923.72	3,500.00	2,576.28	26.39
100-00-55200-120-000 Parks Wages	4,415.03	8,458.01	67,000.00	58,541.99	12.62
100-00-55200-150-000 Parks Employee Benefits	1,625.00	3,426.51	27,000.00	23,573.49	12.69
100-00-55200-350-000 Parks Operating Expense	852.01	4,193.00	22,000.00	17,807.00	19.06
100-00-55200-371-000 Park Maintenance	1,534.23	1,534.23	9,500.00	7,965.77	16.15
100-00-55200-372-000 Athletic Fields Maint/Expense	0.00	0.00	5,500.00	5,500.00	0.00
100-00-55200-511-000 Parks Insurance Expense	0.00	1,912.00	2,156.00	244.00	88.68
100-00-55200-512-000 Parks Worker's Compensation	0.00	21.75	87.00	65.25	25.00
100-00-55310-390-000 Celebrations/Decorations Exp	500.00	500.00	5,000.00	4,500.00	10.00
RECREATION	25,796.26	123,241.58	477,570.67	354,329.09	25.81
100-00-56300-110-000 Planning Salary	0.00	660.00	3,600.00	2,940.00	18.33
100-00-56300-150-000 Planning Employee Benefits	41.31	50.49	280.00	229.51	18.03
100-00-56300-290-000 Planning Contractual Services	1,230.25	1,230.25	8,500.00	7,269.75	14.47
100-00-56300-390-000 Planning Other Expenses	35.92	129.04	300.00	170.96	43.01
100-00-56400-120-000 Board of Appeals Wages	0.00	0.00	500.00	500.00	0.00
100-00-56400-150-000 Board of Appeals Emp Benefits	0.00	0.00	50.00	50.00	0.00
100-00-56400-390-000 Board of Appeals Other Expense	0.00	0.00	50.00	50.00	0.00
100-00-56710-110-000 Economic Development Salary	1,409.28	5,761.37	19,000.00	13,238.63	30.32
100-00-56710-150-000 Economic Development Benefits	366.88	1,406.56	4,600.00	3,193.44	30.58
100-00-56710-290-000 Econ Dev Contractual Services	4,347.25	12,487.25	30,000.00	17,512.75	41.62
100-00-56710-390-000 Economic Development Other Exp	1,196.40	6,948.60	1,200.00	-5,748.60	579.05
REFUNDS	8,627.29	28,673.56	68,080.00	39,406.44	42.12
Total Expenses	214,592.05	868,562.08	3,038,002.60	2,169,440.52	28.59
Net Totals	-138,737.08	-440,240.96	4,588.76	444,829.72	-9,593.90

Issue Statement
Electronic Storage of Public Records
Submitted By: Jessica Lehman
May 7, 2026

Issue:

Lack of storage and hazardous conditions of storage area (basement). Relying on paper-based records leads to inefficiencies in storage, retrieval, and data security. As the volume of information grows, these limitations hinder productivity, increase operational costs, and reduce the organization's ability to quickly access accurate information.

Background:

Staff currently rely on paper-based recordkeeping systems that make it difficult to efficiently store, retrieve, and manage information. This results in time-consuming searches, increased risk of misplaced or damaged records, and the need for significant physical storage space. Implementing an electronic records system would streamline access to information, improve searchability, and reduce the reliance on physical storage, leading to greater operational efficiency and cost savings.

Considerations:

- Add additional language to Section 3-3-1(c) - SEE PAGE 2
- Add Section 3-3-9. Electronic Storage of Department Records - SEE PAGE 18

CHAPTER 3 PUBLIC RECORDS

§ 3-3-1. Definitions.

- (a) **AUTHORITY** — Any of the following Village of Somerset entities having custody of a Village record: an office, elected official, agency, board, commission, committee, council, department or public body corporate and politic created by constitution, law, ordinance, rule or order; or a formally constituted subunit of the foregoing.
- (b) **CUSTODIAN** — That officer, department head, division head, or employee of the Village designated under Section 3-3-3 or otherwise responsible by law to keep and preserve any Village records or file, deposit or keep such records in his or her office, or is lawfully in possession or entitled to possession of such public records and who is required by this Section to respond to requests for access to such records.
- (c) **RECORD** — Any material on which written, drawn, printed, spoken, visual or electromagnetic information **or electronically generated or stored data** is recorded or preserved, regardless of physical form or characteristics, which has been created or is being kept by an authority. "Record" includes, but is not limited to, handwritten, typed or printed pages, maps, charts, photographs, films, recordings, tapes (including computer tapes), and computer printouts **and any other medium on which electronically generated or stored data is recorded or preserved**. "Record" does not include drafts, notes, preliminary computations and like materials prepared for the originator's personal use or prepared by the originator in the name of a person for whom the originator is working; materials which are purely the personal property of the custodian and have no relation to his or her office; materials to which access is limited by copyright, patent or bequest; and published materials in the possession of an authority other than a public library which are available for sale, or which are available for inspection at a public library.
- (d) **DIRECT COST** — The actual cost of personnel plus all expenses for paper, copier time, depreciation and supplies.
- (e) **ACTUAL COST** — The total cost of personnel including wages, fringe benefits and all other benefits and overhead related to the time spent in search of records.

§ 3-3-2. Officers and employees to keep records; delivery to successor.

- (a) Except as provided under Sections 3-3-7, 3-3-9, each officer and employee of the Village shall safely keep and preserve all records received from his or her predecessor or other persons and required by law to be filed, deposited or kept in his or her office or which are in the lawful possession or control of the officer or employee or his or her deputies, or to the possession or control of which he or she or they may be lawfully entitled as such officers or employees.
- (b) Upon the expiration of an officer's term of office or an employee's term of employment, or whenever the office or position of employment becomes vacant, each such officer or employee shall deliver to his or her successor all records then in his or her custody and the successor shall receipt therefor to the officer or employee, who shall file said receipt with the Village Clerk-Treasurer. If a vacancy occurs before a successor is selected or qualifies, such records shall be delivered to and receipted for by the Village Clerk-Treasurer, on behalf of the successor, to be delivered to such successor upon the latter's receipt.

§ 3-3-3. Legal custodians of records designated.

- (a) Each elected official is the legal custodian of his or her records and the records of his or her office, but the official may designate the Village Clerk-Treasurer to act as the legal custodian.
- (b) Unless provided in Subsection (c), the Village Clerk-Treasurer or the Village Clerk-Treasurer's designee shall act as legal custodian for the Village and for any committees, commissions, boards, or other authorities created by ordinance or resolution of the Village Board. The following offices or authorities shall have as a legal custodian of records the individual so named.

Authority

General Village Records
(including Board Records)

Department of Public Works

Police Department

Designated Legal Custodian

Village Clerk-Treasurer

Director of Public Works

Chief of Police

- (c) For every authority not specified in Subsections (a) and (b), the authority's chief administrative officer is the legal custodian for the authority, but the officer may designate an employee of his or her staff to act as the legal custodian.
- (d) Each legal custodian shall name a person to act as legal custodian in his or her absence or in the absence of his or her designee, and each legal custodian shall send notice of the designated deputy to the Village Clerk-Treasurer.
- (e) The Village Clerk-Treasurer shall establish criteria for establishing the records system and shall cause the department/office records system to be reviewed on an annual basis.

§ 3-3-4. Availability of records; right to inspect and copy; fees.

- (a) Except as provided in Section 3-3-6 any person has a right to inspect a record and to make or receive a copy of any record of provided in Sec. 19.35(1), Wis. Stats.
- (b) Records will be available for inspection and copying during all regular office hours.
- (c) If regular office hours are not maintained at the location where records are kept, the records will be available for inspection and copying upon at least forty-eight (48) hours' advance notice of intent to inspect or copy.
- (d) A requester shall be permitted to use facilities comparable to those available to Village employees to inspect, copy or abstract a record.
- (e) The legal custodian may require supervision during inspection or may impose other reasonable restrictions on the manner of access to an original record if the record is irreplaceable or easily damaged.
- (f) A requester shall be charged a fee of twenty-five cents (25¢) to defray the cost of copying records.
 - (1) If the form of a written record does not permit copying, the actual and necessary cost of photographing and photographic processing shall be charged.

- (2) The actual full cost of providing a copy of other records not in printed form on paper, such as films, computer printouts and audio- and video-tapes, shall be charged.
 - (3) If mailing or shipping is necessary, the actual cost thereof shall also be charged.
 - (4) There shall be no charge for locating a record unless the actual cost therefor exceeds Fifty Dollars (\$50.00), in which case the actual cost shall be determined by the legal custodian and billed to the requester.
 - (5) The legal custodian shall estimate the cost of all applicable fees and shall require a cash deposit adequate to assure payment, if such estimate exceeds Five Dollars (\$5.00).
 - (6) Elected and appointed officials of the Village shall not be required to pay for public records they may reasonably require for the proper performance of their official duties.
 - (7) The legal custodian may provide copies of a record without charge or at a reduced charge where he or she determines that waiver or reduction of the fee is in the public interest.
- (g) Pursuant to Sec. 19.34, Wis. Stats., and the guidelines therein listed, each authority shall adopt, prominently display and make available for inspection and copying at its offices, for the guidance of the public, a notice containing a description of its organization and the established times and places at which, the legal custodian from whom, and the methods whereby, the public may obtain information and access to records in its custody, make requests for records, or obtain copies of records, and the costs thereof. This Subsection does not apply to members of the Village Board.

§ 3-3-5. Procedure to inspect or copy records.

- (a) A request to inspect or copy a record shall be made to the legal custodian. A request shall be deemed sufficient if it reasonably describes the requested record or the information requested. However, a request for a record without a reasonable limitation as to subject matter or length of time represented by the record does not constitute a sufficient request. A request may be made orally, but a request must be in writing before an action to enforce the request is commenced under Sec. 19.37, Wis. Stats. Except as provided below, no request may be refused because the person making the request is unwilling to be identified or to state the purpose of the request. No request may be refused because the request is received by mail, unless prepayment of a fee is required under Section 3-3-4(f)(6). A requester may be required to show acceptable identification whenever the requested record is kept at a private residence or whenever security reasons or federal law or regulations so require.
- (b) Each custodian, upon request for any record, shall, as soon as practicable and without delay, either fill the request or notify the requester of the authority's determination to deny the request in whole or in part and the reasons therefor. If the legal custodian, after conferring with the Village Attorney, determines that a written request is so general as to be unduly time consuming, the party making the request may first be required to itemize his or her request in a manner which would permit reasonable compliance.
- (c) A request for a record may be denied as provided in Section 3-3-6. If a request is made orally, the request may be denied orally unless a demand for a written statement of the reasons

denying the request is made by the requester within five business days of the oral denial. If a written request is denied in whole or in part, the requester shall receive a written statement of the reasons for denying the request. Every written denial of a request shall inform the requester that, if the request for the record was made in writing, then the determination is subject to review upon petition for a writ of mandamus under Sec. 19.37(1), Wis. Stats., or upon application to the attorney general or a district attorney.

§ 3-3-6. Certain records exempted or excepted from inspection.

- (a) As provided in Sec. 19.36, Wis. Stats., the following records are exempt from inspection under this Chapter.
- (1) Records specifically exempted from disclosure by state or federal law or authorized to be exempted from disclosure by state law;
 - (2) Any record relating to investigative information obtained for law enforcement purposes if federal law or regulations require exemption from disclosure or if exemption from disclosure is a condition to receipt of aids by the state;
 - (3) Computer programs and files, although the material used as input for a computer program/file or the material produced as a product of the computer program is subject to inspection; and
 - (4) Pursuant to Sec. 905.08, Wis. Stats., a record or any portion of a record containing information qualifying as a common law trade secret. "Trade secrets" are defined as unpatented, secret, commercially valuable plans, appliances, formulas, or processes which are used for making, preparing, compounding, treating or processing articles, materials or information which are obtained from a person and which are generally recognized as confidential.
- (b) As provided by Sec. 43.30, Wis. Stats., public library circulation records are exempt from inspection under this Section.
- (c) In responding to a request for inspection or copying of a record which is not specifically exempt from disclosure, the legal custodian, after conferring with the Village Attorney, may deny the request, in whole or in part, only if he or she determines that the harm to the public interest resulting from disclosure would outweigh the public interest in full access to the requested record. Examples of matters for which disclosure may be refused include, but are not limited to, the following:
- (1) Records obtained under official pledges of confidentiality which were necessary and given in order to obtain the information contained in them.
 - (2) Pursuant to Sec. 19.85(1)(a), Wis. Stats., records of current deliberations after a quasi-judicial hearing.
 - (3) Pursuant to Sec. 19.85(1)(b) and (c), Wis. Stats., records of current deliberations concerning employment, dismissal, promotion, demotion, compensation, performance, or discipline of any Village officer or employee, or the investigation of charges against a Village officer or employee, unless such officer or employee consents to such

disclosure.

- (4) Pursuant to Sec. 19.85(1)(d), Wis. Stats., records concerning current strategy for crime detection or prevention.
 - (5) Pursuant to Sec. 19.85(1)(e), Wis. Stats., records of current deliberations or negotiations on the purchase of Village property, investing of Village funds, or other Village business whenever competitive or bargaining reasons require nondisclosure.
 - (6) Pursuant to Sec. 19.85(1)(f), Wis. Stats., financial, medical, social or personal histories or disciplinary data of specific persons which, if disclosed, would be likely to have a substantial adverse effect upon the reputation of any person referred to in such history or data.
 - (7) Pursuant to Sec. 19.85(1)(g), Wis. Stats., communications between legal counsel for the Village and any officer, agent or employee of the Village, when advice is being rendered concerning strategy with respect to current litigation in which the Village or any of its officers, agents or employees is or is likely to become involved, or communications which are privileged under Sec. 905.03, Wis. Stats.
 - (8) Pursuant to Sec. 19.85(1)(h), Wis. Stats., requests for confidential written advice from an ethics board, and records of advice given by such ethics board on such requests.
- (d) If a record contains information that may be made public and information that may not be made public, the custodian of the record shall provide the information that may be made public and delete the information that may not be made public from the record before release. The custodian shall confer with the Village Attorney prior to releasing any such record and shall follow the guidance of the Village Attorney when separating out the exempt material. If, in the judgment of the custodian and the Village Attorney, there is no feasible way to separate the exempt material from the nonexempt material without unreasonably jeopardizing nondisclosure of the exempt material, the entire record shall be withheld from disclosure.

§ 3-3-7. Destruction of records; Public Records and Forms Board.

- (a) Historical records. Under Sec. 19.21(4)(a), Wis. Stats., municipalities must notify the State Historical Society of Wisconsin (SHSW) prior to destroying records. However, the SHSW has waived the required sixty (60) days notice for any record marked "W" (waived notice). SHSW must be notified prior to destruction of a record marked "N" (non-waived). Notice is also required for any record not listed in this Section.
- (b) Microfilming or optical imaging of records. Local units of government may keep and preserve public records through the use of microfilm providing the microfilm or optical imaging meets the applicable standards in Sec. 16.612, Wis. Stats. Retention periods and estimated costs and benefits of converting records between media should be considered. After verification, paper records converted to microfilm or optical imaging should be destroyed. The retention periods identified in this Section apply to records in any media.
- (c) Destruction after request for inspection. No requested records may be destroyed until after the request is granted or sixty (60) days after the request is denied. If an action is commenced

under Sec. 19.37, Wis. Stats., the requested record may not be destroyed until after a court order is issued and all appeals have been completed. [See Sec. 19.35(5), Wis. Stats.]

- (d) Destruction pending litigation. No record subject to pending litigation shall be destroyed until the litigation is resolved.
- (e) Review and approval by public records and forms board. This Chapter and the retention periods of less than seven (7) years have been reviewed and approved by the Public Records and Forms Board.
- (f) Legend. The following terms shall be applicable in Sections 3-3-7 and 3-3-8:
 - (1) Records description. Provides a brief description of the records. Group specific items such as forms into logical groups that have the same function or purpose.
 - (2) Period of retention. Refers to the time that the identified records must be kept until destruction.

CR Stands for creation which usually refers to receipt or creation of the record.

FIS Stands for current fiscal year and the additional amount of time as indicated.

EVT Stands for event and refers to an occurrence that starts the retention "clock ticking." Close of contract, termination of employees, and disposition of a case are common events.

P Stands for permanent retention.

- (3) Time. Is expressed in years unless specifically identified as month or day.
- (4) Authority. Refers to any specific statutory, administrative rule, or specific regulation that determines retention of the record. In most cases this will be blank because units of government have discretion to establish a time period.
- (5) SHSH notify. Refers to whether or not the State Historical Society of Wisconsin has waived the required statutory notification prior to destruction of records.

W Means records are not historical and the required notification is waived.

N Means the records may have secondary historical value and therefore SHSW notification is required on a case-by-case basis prior to destruction.

N/A Means not applicable and refers to those circumstances where a local unit of government is retaining a record permanently.

§ 3-3-8. Record retention schedule.

- (a) Accounting records. The following public records may be destroyed after the expiration of the designated retention period:

Records	Authority	
	Period of Retention	SHSW Notice
Accounts Payable:		
Purchase invoices	FIS + 7 years	W
Vouchers	FIS + 7 years	W
Accounts Receivable:		
A/R invoices	FIS + 7 years	W
Receipts	FIS + 7 years	W
Collection blotters	EVT + 1 year (after audit)	W

- (b) Board of review records. The following public records may be destroyed after the expiration of the designated retention period:

Records	Authority	
	Period of Retention	SHSW Notice
Form of objection to property assessment and supporting documentation	EVT + 7 years (after final action by Board of Review or completion of appeal)	W
Minute book of Board of Review	CR + 7 years	N
Proceedings of the Board of Review on audio taps or as stenographic notes including any transcriptions thereof	EVT + 7 years (after final action by Board of Review or completion of appeal)	W
Notice of Determinations of the Board of Review	EVT + 7 years (after final action by the Board of Review or completion of appeal)	W

- (c) Budget and audit records. The following public records may be destroyed after the expiration of the designated retention period:

Records	Authority	
	Period of Retention	SHSW Notice
Budget worksheets	FIS + 3 years	W
Minutes of the board of estimates	Permanent	N/A
Final budget	Permanent	N/A
Audit reports	Permanent	N/A

- (d) Building permits and inspection records. The following records may be destroyed after the expiration of the designated retention period:

Records	Authority	
	Period of Retention	SHSW Notice
Applications and permits	EVT (Life of structure)	W
Code Compliance inspection-reports	EVT (Life of structure)	W
Inspection address file	EVT (Life of structure)	W

Records	Authority	
	Period of Retention	SHSW Notice
Certificates of occupancy	EVT (Until superseded)	W
Energy calculation worksheets	CR + 3 years	
State approved commercial building plans	EVT + 4 years	W
Permit fee receipts	FIS + 7 years (provided record has been audited)	W
Permit ledger	CR + 7 years	W
Village attorney's case file, copy	EVT + 1 year (after case has been closed)	W
Quarter section maps, copies	EVT (Until superseded)	W
Records of the Zoning Board of Appeals (includes minutes of board and supporting documents submitted to Board)	Permanent	N/A
Records of the Plan Commission - if created (includes minutes of meetings of Commission and supporting documents submitted to the commission)	Permanent	N/A

- (e) Election records. All materials and supplies associated with an election may be destroyed according to the following schedule unless there is a recount or litigation pending with respect to the election:

Records	Authority	
	Period of Retention	SHSW Notice
Voter serial number slips	EVT + (14 days after a primary) (21 days after an election)	W
Applications for absentee ballots	EVT + (90 days after the election) (22 months after the election for federal offices)	W
Forms associated with election such as tally sheets, inspector's statements and nomination papers	EVT + (90 days after the election) (22 months after the election for federal offices)	W
Official canvass statements	EVT + (10 years after the election)	W
Registration and poll lists Nonpartisan primaries and elections	EVT + (2 years after the election for which they were created)	W
Registration and poll lists Partisan primaries and general election	EVT + (4 years after the election for which they were created)	
Cancelled registration cards	EVT + (4 years after cancellation)	W
Election notices	EVT + (1 year after the election) (22 months for federal elections)	W
Proofs of publication and correspondence relative to publications	EVT + (1 year after the election) (22 months for federal elections)	W
Campaign registration statements	EVT + (6 years after termination by the registrant)	W
Campaign finance reports	EVT + (6 years after date of receipt)	W

- (f) Engineering and public works records. The following public records may be destroyed after the expiration of the designated retention period:

Records	Authority	
	Period of Retention	SHSW Notice
Field notes	Permanent	N/A
Benchmark books	Permanent	N/A
Section corner monument logs	Permanent	N/A
Aerial photographs	EVT (Until superseded)	W
Village maps	Permanent	N/A
Water, storm, and sanitary sewer main maps	Permanent	N/A
Profile & grade books	Permanent	N/A
Excavation plans of private utilities	Permanent	N/A
Index to maps	Permanent	N/A
Preliminary subdivision plats	EVT (Until superseded by final plat)	W
Final subdivision plats	Permanent	N/A
Annexation plats	Permanent	N/A
Assessor's plats	Permanent	N/A
Structure plans for Village buildings and bridges	EVT (Life of the structure)	N
Annual reports	Permanent	N/A
Records of the Plan Commission - if created (includes minutes of meetings of the Commission and supporting documents submitted to the commission)	Permanent	N/A
Records of the Zoning Board of Appeals (includes minutes of the meetings of the board and supporting documents submitted to the board)	Permanent	N/A
House number and address change file	Permanent	N/A
Street vacations and dedications, copies	EVT (Retain for active reference life)	W
Permits (includes permits for the excavation of streets by private utility companies)	EVT + 3 years	W
Petitions for street and sewer systems	EVT + 2 years	W
Special assessment calculations	EVT + 2 years	W
TV sewer inspection records	EVT (Until superseded)	W
State highway aide program records	FIS + 7 years	W

- (g) Fidelity bond records. The following public records may be destroyed after the expiration of the designated retention period:

Records	Authority	
	Period of Retention	SHSW Notice
Oath of office	EVT + 5 years (after the term of service covered by the oath has ended)	W

- (h) Insurance records and policies. The following public records may be destroyed after the expiration of the designated retention period:

Records	Authority	
	Period of Retention	SHSW Notice
Policy	FIS + 7 years	W
Policy bids, unsuccessful	EVT + 1 year	W
Claims	EVT + 7 years	W

- (i) Journals, registers and ledger. The following public records may be destroyed after the expiration of the designated retention period:

Records	Authority	
	Period of Retention	SHSW Notice
Receipts journal	FIS + 15 years	W
Voucher/order register	FIS + 15 years	W
General journal	FIS + 15 years	W
Journal voucher	FIS + 15 years	W
Appropriation journal	FIS + 15 years	W
Appropriation journal voucher	FIS + 15 years	W
General ledger	FIS + 15 years	W
Trial balance	EVT (Until audited)	W

- (j) Legal opinions. Legal opinions rendered shall not be destroyed and shall be retained permanently.
- (k) Licenses and permits. The following public records may be destroyed after the expiration of the designated retention period.

Records	Authority	
	Period of Retention	SHSW Notice
Liquor and beer related license applications	EVT + 4 years	W
Other license applications	EVT + 3 years	W
Receipts	CR + 4 years	W
License stubs:		
All liquor and beer related	CR + 4 years	W

Records	Authority	
	Period of Retention	SHSW Notice
Other	CR + 3 years	W
Dog licenses monthly reports to County Clerk	CR + 3 years	W

- (l) Municipal court records. The legal custodian, as defined in Sec. 19.33, Wis. Stats., of the following records concerning the Village of Somerset Municipal Court, (if one is created) or his or her designee(s), may destroy the following public records may be destroyed after the expiration of the designated retention period:

Records	Authority	
	Period of Retention	SHSW Notice
Audio tape recordings of trials or juvenile matters	EVT (Until expiration of statute of limitations to appeal to circuit court)	W
Municipal Court case files	EVT + 6 years (after entry of final judgment)	W
Municipal Court case files, Village Attorney's copies	EVT + 6 months (after entry of final judgment)	W
Municipal Court minutes record	EVT + 5 years (after entry of final judgment)	W
Municipal Court record	EVT + 5 years (after entry of final judgment)	W
Municipal Court judgment docket a record of all money judgment	EVT + 20 years (after final docket entry)	W

- (m) Payroll records. The following public records may be destroyed after the expiration of the designated retention period:

Records	Authority	
	Period of Retention	SHSW Notice
Payroll support record	FIS + 2 years	W
Employee's withholding allowance certificate	EVT + 5 years (after being superseded)	W
Employee's WI. withholding exemption certificate	EVT + 5 years (after being superseded)	W
Employee enrollment and waiver cards	EVT + 2 years (after being superseded or terminated)	W
Employee earning records	FIS + 5 years	W
Payroll check register	FIS + 5 years	W
Payroll distribution record	FIS + 5 years	W
Payroll voucher	FIS + 5 years	W
Cancelled payroll checks	FIS + 5 years	W
Wage and Tax Statement	FIS + 5 years	W
Report of WI. Income Tax	FIS + 5 years	W
Employer's Annual Reconciliation of WI Income Tax withheld from wages	FIS + 5 years	W
Federal deposit tax stub	FIS + 5 years	W
Quarterly report of federal income tax withheld	FIS + 5 years	W

Records	Authority	
	Period of Retention	SHSW Notice
Annual report of federal income tax withheld	FIS + 5 years	W
State's quarterly report of wages paid	FIS + 5 years	W
Monthly memorandum report	FIS + 5 years	W
Quarterly report, payroll summary	FIS + 5 years	W
Premium due notices	FIS + 5 years	W

(n) Public safety department records. The following public records may be destroyed after the expiration of the designated retention period:

Records	Authority	
	Period of Retention	SHSW Notice
Traffic citations (and accompanying documentation) sent through Village Municipal Court (if created)	EVT + 1 year (after closed)	W
Ordinance Citations	EVT + 2 years (after closed)	W
All accounting records	CR + 7 years	W
Electronic recordings of court proceedings which were appealed	EVT + 7 years	W
Court statistical reports	CR + 7 years	N
Arraignment calendars	CR + 7 years	W
Warrant and commitment listings	CR + 7 years	W
Municipal Court correspondence	CR + 7 years	W
Electronic recordings of court proceedings which were not appealed	EVT + 6 months	W
Personnel records	EVT + 8 years	W
Property inventory records	EVT + 8 years	W
Citizen complaints against police officers	EVT + 8 years	W
Investigation and citation records:		
arrest records	EVT + 8 years	W
incident records	EVT + 10 years	W
fingerprint cards	EVT + 8 years	W
evidence cards	EVT + 10 years	W
work schedules	CR + 7 years	W
accident reports	EVT + 4 years	W
investigation reports	EVT + 10 years (from date of closing investigation)	W
Audio and video tape recordings:		
Police dispatch audio tapes	CR + 120 days	W
Police video tapes	CR + 120 days	W
Information teletype messages	CR + 30 days	W

Records	Authority	
	Period of Retention	SHSW Notice
Medical records, re: occupational	EVT + 30 years	W
Training records for exposure control	CR + 3 years	W

- (o) Public works projects and contracts. The following public records may be destroyed after the expiration of the designated retention period:

Records	Authority	
	Period of Retention	SHSW Notice
Notice to contractors	EVT + 7 years (after completion of project)	W
	EVT + 2 years (for unsuccessful bidders)	W
Certified check	EVT (Retain until contract has been signed and return to bidder)	W
Bid bond	EVT + 7 years (after completion of project)	W
	EVT + 2 years (for unsuccessful bidders)	W
Bidder's proof of responsibility	EVT + 7 years (after completion of project)	W
	EVT + 2 years (for unsuccessful bidders)	W
Bids	EVT + 7 years (after completion of project)	W
	EVT + 2 years (for unsuccessful bidders)	W
Affidavit of organization and authority	EVT + 7 years (after completion of project)	W
	EVT + 2 years (for unsuccessful bidders)	W
Bid tabulations	EVT + 2 years	W
Performance bond	EVT + 7 years (after completion of project)	W
Contract	EVT + 7 years (after completion of project)	W
Master project files	EVT + 20 years (after life of structure)	N
Blueprints	EVT (Until superseded by the as-built tracings)	W
As-built tracings	EVT (Life of the project)	N

- (p) Purchasing records. The following public records may be destroyed after the expiration of the designated retention period:

Records	Authority	
	Period of Retention	SHSW Notice
Purchase requisitions	EVT + 1 year (after PO issued)	W
Purchase orders	FIS + 7 years	W
Receiving report	FIS + 7 years	W
Bids, successful	EVT + 7 years (after contract has expired)	W
Bids, unsuccessful	EVT + 1 year (after PO issued)	W
Inventory of property	EVT (Retain until superseded)	W

- (q) Real property records. The following public records may be destroyed after the expiration of the designated retention period:

Records	Authority	
	Period of Retention	SHSW Notice
Deeds	Permanent	N/A
Opinions of title	Permanent	N/A
Abstracts and certificates of title	Permanent	N/A
Title insurance policies	Permanent	N/A
Plats	Permanent	N/A
Easements	Permanent	N/A
Leases	EVT + 7 years (after termination of lease)	W
Vacation or alteration of plat	Permanent	N/A

- (r) Sewer and water utility records. The following public records may be destroyed after the expiration of the designated retention period:

Records	Authority	
	Period of Retention	SHSW Notice
Water stubs	FIS + 2 years	W
Receipts of current billings	FIS + 2 years	W
Customer's ledgers of municipal utilities	FIS + 2 years	W
All other utility records	CR + 7 years	W
Water quality laboratory tests (deep well water analysis detail and summary reports; chemical and bacteriological analysis of municipal drinking water detail and summary reports; municipal drinking water fluoride analysis; and water quality control readings)	EVT + 5 years (if information has been transferred to a permanent test site file location) EVT + 1 year	W
Maps showing the location and physical characteristics of the utility plant	EVT (Until map is superseded)	W
Engineering records in connection with construction projects	EVT (Until record is superseded or 6 years after plant is retired provided mortality data are retained)	W
Operating records:		
Station pumpage records	CR + 15 years or EVT + 3 years (after the source is abandoned)	W
Interruption records	CR + 6 years	W
Meter rest records	EVT (see § PSC 185.46, Wis. Adm. Code)	W
Meter history records	EVT (Life of meter)	W
Annual meter accuracy summary	CR + 10 years	W
Pressure records	CR + 6 years	W
Customer records:		

Records	Authority	
	Period of Retention	SHSW Notice
complaint records	CR + 3 years	W
customer deposit	EVT + 6 years (after refund)	W
meter reading		
sheets or cards	CR + 6 years	W
billing records	CR + 6 years	W
Filed rates and rules	Permanent	W
Analyses of any water samples taken from the water system	EVT + 10 years (pursuant to § NR 109.12, Wis. Adm. Code)	W

- (s) Special assessment records. The following public records may be destroyed after the expiration of the designated retention period:

Records	Authority	
	Period of Retention	SHSW Notice
Preliminary resolution	CR + 2 years after created	W
Report on special assessment project	CR + 2 years after created	W
Waiver of special assessment notice and hearing	EVT + 1 year (after final resolution is approved)	W
Final resolution	Permanent	N/A
Certified special assessment roll	EVT (Retain until all assessments are collected)	W
Statement of new special assessments	CR + 5 years	W
Special assessment payment register	EVT (Retain until all assessments are collected)	W

- (t) Street and highway records. The following public records may be destroyed after the expiration of the designated retention period:

Records	Authority	
	Period of Retention	SHSW Notice
Street operations file	CR + 2 years after created	W
Street and sidewalk maintenance and repair	CR + 25 years	W
Tree planting, inspection, trimming and removal	CR + 25 years	W
Stock control records	CR + 2 years	W
Fuel usage reports	CR + 2 years	W
Heavy equipment and vehicle	EVT (Life of equipment and/or vehicle inventory ledger or until inventory ledger is superseded)	W
Vehicle maintenance histories	EVT (Life of vehicle)	W

Records	Authority	
	Period of Retention	SHSW Notice
Vehicle expense reports	EVT (Life of vehicle)	W
Vehicle usage reports	CR + 2 years	W
Payroll support records	CR + 2 years	W
Purchasing records	CR + 7 years	W
Complaint ledger	CR + 2 years	W
Monthly reports	CR + 3 years	W
Annual reports	Permanent	N/A

- (u) Tax calculation records. The following public records may be destroyed after the expiration of the designated retention period:

Records	Authority	
	Period of Retention	SHSW Notice
Escrow account list	EVT (Retain until superseded)	W
Receipts	FIS + 7 years	W
Receipt stub book	FIS + 7 years	W
Tax collection blotters	EVT (Until audited)	W
Statement of taxes remaining unpaid	EVT (Retain with tax roll)	W
Tax settlement receipt	FIS + 5 years	W
Municipal treasurer's settlement	FIS + 5 years	W
Personal property tax roll	FIS + 15 years	N

- (v) Treasurer's records. The following public records may be destroyed after the expiration of the designated retention period:

Records	Authority	
	Period of Retention	SHSW Notice
Minute books	Permanent	N/A
Audio tapes	CR + 1 year; 90 days if made solely for the purpose of drafting the minutes	W
Ordinances	Permanent	N/A
Resolutions	Permanent	N/A
Ordinance book	Permanent	N/A
Affidavits of publication	CR + 3 years	W

§ 3-3-9. Electronic Storage of Department Records.

- (a) Pursuant to Wis. Stat. §19.21(4)(c), an authority may keep and preserve public records through electronic format provided that the applicable standards established in Wis. Stat. §§ 16.61(7) and 16.612 are met. An authority should consider factors such as retention periods and estimated costs and benefits of converting records to an electronic format. After verification, paper records converted to electronic format should be destroyed.

ARTICLE IV. FIRE PROTECTION CHARGES

Sec. 18-81. Special calls.

- (a) Special calls for the fire department will be charged according to the discretion of department personnel depending on the level of danger or hazard involved. These special charges will include:
 - (1) Railroad related fires.
 - (2) Fires on department of natural resources or other state lands or on federal lands.
 - (3) Fires caused by arson.
 - (4) Airplane or helicopter incidents.
 - (5) Vehicle fires on state, county or township roads where a spill or leak is involved, regardless of whether the spill or leak includes hazardous material.
 - (6) Situations that may endanger life or property where there has been a known fire hazard due to careless or unsafe burning or violation of numerous DIHL codes.
- (b) Persons responsible for the costs of special calls will be notified by certified mail that their property has been placed in special assessment for any fire calls.
- (c) Costs for special situations shall include, but are not limited to, the following, in the amounts provided in this section or in the town fee schedule:
 - (1) Vehicle use charges and fuel.
 - (2) Tool use.
 - (3) Where necessary due to damage or contamination, replacement of tools and equipment.
 - (4) Supplies and special agents such as foams, absorbent materials, plastic covers, air packs, air compressors for filling bottles, turnout gear and special or additional equipment or supplies that must be purchased specifically for the incident.
 - (5) Medical care for personnel at the scene and, if hazardous materials are involved, costs of medical examination of all personnel at the scene.
 - (6) Costs for outside contracting or equipment services or supplies.
 - (7) Costs will include the cost of food and refreshments needed during extended or bad weather incidents.
 - (8) Costs of other department under mutual aid arrangements will be included.
 - (9) Costs of water used.
- (d) Where fees are assessed under the schedule per manhour, charges begin from the time of the alarm until all equipment is refitted and ready for service. Manhours are charged in one-half hour increments only. For time over eight hours, an additional overtime fee as provided in the town fee schedule is applicable. Manhours include personnel at the scene and those on standby.

Sec. 18-82. Calculation of special call costs.

- (a) Where special call fees are assessed under the town fee schedule per manhour, charges begin from the time personnel are dispatched to the time they return to the fire hall. Time is charged in one-half hour increments only.
- (b) Where fees are assessed under the schedule for vehicles, the base charge shall be applied for each vehicle used.
- (c) In addition to fees specified in the town fee schedule, the property owner shall be responsible for the cost of supplies used, including, but not limited to, the refill of fire extinguishers, charges for water used in the town, foam or other extinguishing products and gas for vehicles and equipment.
- (d) In addition to fees specified in the town fee schedule, the property owner shall be responsible for the cost of medical standby, if necessary.
- (e) The maximum charge for any fire call to a resident for a structure fire would be \$1,000.00, except for special charge fire.

(Ord. No. 1990, § 2, 5-2-1990; Ord. No. 2024-03, 5-1-2024)

Sec. 18-83. Costs of fire services requested by property owner from other departments.

It is the policy of the town to contract with the fire departments selected from time to time by the town board. Any property owner requesting fire protection directly from any fire department other than one authorized by the town board for mutual aid purposes shall be responsible for the full costs billed to the town for the fire call by the unauthorized fire department. This section shall not apply to the costs of any other department responding at the request of an authorized department under mutual aid agreements or arrangements.

(Ord. No. 1990, § 3, 5-2-1990)

Sec. 18-84. Billing and payment.

The cost of fire calls shall be billed by the town clerk to the property owner and paid to the town treasurer within 60 days of the date of the bill. The failure to pay the bill within 60 days will result in interest being charged at the rate of 12 percent per year from the date of the bill. Those bills remaining outstanding, including interest, for more than 90 days as of November 1 of any year shall become a lien against the real estate from which fire protection was provided and shall be placed on the tax roll as a delinquent special charge pursuant to Wis. Stats. § 66.0703.

(Ord. No. 1990, § 4, 5-2-1990)

Secs. 18-85—18-111. Reserved.

VILLAGE OF SOMERSET

Employee Concern Policy

Article I. Purpose

The purpose of this policy is to provide a clear and fair process for employees, as defined to report any activity that they may consider to be illegal or dishonest such as workplace safety, mismanagement or abuse of authority, substantial waste of public funds or danger to public health or safety, or other violations of state and federal law. The Village of Somerset is committed to maintaining a respectful and safe work environment where employees can express concerns without fear of retaliation. This policy is intended to supplement but not replace any applicable state and federal laws governing municipalities and municipal employment.

All reports will be handled promptly, fairly, and confidentially to the extent possible. Retaliation, or threat of retaliation, against any employee who files a report or participates in an investigation is strictly prohibited. The Village will not retaliate against, or threaten to retaliate against, an employee who, in good faith, has made a protest or complaint against some practice of the Village, Village employee, Village Officer, or of another individual or entity whom the Village had a business relationship with, on the basis of a reasonable belief that the practice is in violation of state or federal law, or a clear mandate of public policy concerning health, safety, welfare, or protection of the environment.

Article II. Procedure

Reporting

If any employee reasonably believes that some activity of the Village or a Village employee or officer is in violation of local, state or federal law or established Village procedures, a written complaint describing the nature of the violation may be filed with (1) the employee's supervisor, Village President, Chief of Police or Village Attorney as is appropriate under the circumstances.

Processing and Resolution

The Complaint may be referred to an internal Village resource or external resource as appropriate. All investigations must be completed within a reasonable amount of time and in accordance with the following:

- (1) The Village must inform the employee in writing the outcome of any investigation or whether the matter warrants additional investigation, or if the matter is referred to another governmental agency.

- (2) The Village shall keep the identity of the disclosing employee confidential as reasonably possible to do so.
- (3) The Village shall appropriately respond to the findings of each investigation on a case-by-case basis according to Village policy and state and federal law.

Adopted by the Village of Somerset: December _____, 2025

Donnie Kern, Village President

VILLAGE OF SOMERSET

Employee Concern Policy

Article I. Purpose

Although it's my opinion, and the attorney that drafted this may disagree, employees at the Village have these same opportunities/responsibilities through the employee handbook as are outlined here...perhaps some of the words are different.

The purpose of this policy is to provide a clear and fair process for employees, as defined to report any activity that they may consider to be illegal or dishonest such as workplace safety, mismanagement or abuse of authority, substantial waste of public funds or danger to public health or safety, or other violations of state and federal law. On page 6 of the employee handbook under the heading "Reporting Procedure and Non-Retaliation" it states in relevant part: "If you believe an employment decision has been made, an incident has occurred, behavior exists that compromises our ability to maintain a safe work environment, or you have been subject to any action that does not conform with our commitment to the stated policies on Equal Employment Opportunity, Anti-Harassment and Non-Discrimination or Workplace Violence you should...". On page 11 of the employee handbook Under "Problem Resolution Procedure" it states in relevant part: "The Village is interested in every employee's concerns, questions, and issues. It is our policy to maintain a harmonious workplace environment. We encourage employees to express concerns about work related issues, including workplace communication, interpersonal conflict, and other working conditions...". In both sections it outlines what the employee should do and what the Village will do in response to the employee's concerns. In both sections it also addresses the matter of retaliation.

The Village of Somerset is committed to maintaining a respectful and safe work environment where employees can express concerns without fear of retaliation. This policy is intended to supplement but not replace any applicable state and federal laws governing municipalities and municipal employment.

All reports will be handled promptly, fairly, and confidentially to the extent possible. Retaliation, or threat of retaliation, against any employee who files a report or participates in an investigation is strictly prohibited. The Village will not retaliate against, or threaten to retaliate against, an employee who, in good faith, has made a protest or complaint against some practice of the Village, Village employee, Village Officer, or of another individual or entity whom the Village had a business relationship with, on the basis of a reasonable belief that the practice is in violation of state or federal law, or a clear mandate of public policy concerning health, safety, welfare, or protection of the environment.

Article II. Procedure

Reporting

If any employee reasonably believes that some activity of the Village or a Village employee or officer is in violation of local, state or federal law or established Village procedures, a written

complaint describing the nature of the violation may be filed with (1) the employee's supervisor, Village President, Chief of Police or Village Attorney as is appropriate under the circumstances. My concern here is that by providing the employee with the "freedom" to bring their concern to any of the individuals listed without first trying to work through the issue with their supervisor this policy cuts out people that should be involved in arriving at a solution. (this may not have been the intent of the author but it can be interpreted that every concern can go directly to the president or the attorney.

Processing and Resolution

The Complaint may be referred to an internal Village resource or external resource as appropriate. All investigations must be completed within a reasonable amount of time and in accordance with the following:

- (1) The Village must inform the employee in writing the outcome of any investigation or whether the matter warrants additional investigation, or if the matter is referred to another governmental agency.
- (2) The Village shall keep the identity of the disclosing employee confidential as reasonably possible to do so.
- (3) The Village shall appropriately respond to the findings of each investigation on a case-by-case basis according to Village policy and state and federal law.

Adopted by the Village of Somerset: December _____, 2025

Donnie Kern, Village President

Analysis of the Proposed Employee Concern Policy

Summary of the proposal:

Reportable activities are listed in several places in the proposal:

- violations of local, municipal, state, or federal law
- dishonest activity
- illegal activity
- workplace safety
- mismanagement
- abuse of authority
- substantial waste of public funds
- danger to public health or safety
- violation of a clear mandate of public policy concerning health, safety, welfare, or protection of the environment
- established village procedure

There will be no retaliation when reports are made in good faith based on reasonable belief. Confidentiality will be honored to the extent possible.

Written complaints may be filed with the **employee's supervisor, Village President, Chief of Police or Village Attorney** as is appropriate under the circumstances.

Complaints will be investigated internally or by outside resources. The village will respond appropriately to the investigation, and the complainant will be informed of the outcome in writing.

Village Attorney notes (red text):

- (1) The reportable activities described in the proposal may duplicate existing handbook provisions (see Reporting Procedures and Non-Retaliation, page 6, and Problem Resolution Procedure, page 11).
- (2) Pages 6 and 11 of the handbook describe how employees should report concerns, and how the village should respond. Retaliation is also addressed.
- (3) Providing that reports may be filed with "the supervisor, the Village President, the Chief of Police, or the Village Attorney as is appropriate under the circumstances." may mean the employee can chose where to file the complaint. They may go directly to the president or the attorney. They may bypass the supervisor with whom a solution might be reached.

My suggestions:

- (1) The first paragraph of the proposal that describes reportable activities duplicates some handbook language and adds examples (pages 6 and 11). It doesn't conflict with the handbook, so this paragraph is ok to adopt as written.
- (2) The attorney's concern about bypassing the supervisor could be resolved by requiring that reports must be made first to the supervisor unless circumstances such as the nature or source of the complaint warrant skipping the supervisor. But this contradicts the proposal, which allows the employee to choose where to report.
- (3) The handbook and the proposal have different procedures for reporting complaints, apparently depending on the nature of the complaint or problem. This may be confusing for employees.
 - Safety, EEO, harassment, discrimination, or violence concerns should be reported to the **department head or the village clerk or treasurer**. If one of those individuals is involved in the incident, the report should be made directly to the **village board president**. (Reporting Procedure and Non-Retaliation page 6)
 - Issues such as workplace communication, interpersonal conflict, and other working conditions should be discussed with (and then put in writing to) the **department head**. If this is uncomfortable, the employee may go immediately to the **village clerk or treasurer** (Problem Resolution Procedure page 11)
 - Employees should report retaliation to the **department head or the village clerk or treasurer**. (Reporting Procedure and Non-Retaliation page 7)
 - **Violation(s) of local, state or federal law or established village procedures** may be reported to the **supervisor, village president, chief of police, or village attorney** as is appropriate under the circumstances" There is no guidance as to what "circumstances" might be. (Proposed Employee Concern Policy)
- (4) Before adopting the proposed policy we should consider these issues:
 - Should there be different procedures for reporting complaints to depending on the nature of the complaint?

- Is it clear to employees which procedures to follow?
- Is it clear when complaints must be in writing? (See the proposal and the Problem Resolution procedure, page 11, Step 2)
- The proposal refers to “established village procedures.” Are those in policies, the handbook, memos. or other instructions?
- Is the difference between informal and formal complaints clear?
- Is the (uninvolved) supervisor generally the best first person to report to?
- Should both the clerk and the treasurer receive complaints?
- Does reporting directly to the village attorney incur an additional expense? Is there an existing policy or practice that requires approval (by whom?) to engage the attorney? Can we “pre-authorize” direct reports to the attorney under special circumstances?
- Is terminology consistent? For example, is the Department Head sometimes (always?) the Supervisor? Are the village president or village board president the same as the mayor?