



**BALL STATE  
UNIVERSITY**

**MASTER CALENDAR  
OF REPORTING REQUIREMENTS**

Ball State University-Authorized Charter Schools

**2023-2024**

**Office of Charter Schools**

Ball State University  
Teachers College (TC), Room 912  
Muncie, IN 47306

**Phone:** 765-285-1336

**Fax:** 765-285-9873

*The requirements outlined in this calendar are not all-inclusive and are subject to change. The OCS will notify schools if there are changes to the OCS calendar. The 2023-24 Calendar reflects a transition to a new document management system*

Required Annual Submissions		
Due Date	Document Description	Submit to:
<b>July 1</b>	Onboarding requirements for virtual schools	SharePoint/Virtual School Only Reporting
	School calendar	SharePoint/School Calendar
<b>July 30</b>	4th quarter financials for previous fiscal year statements prepared in accordance with Generally Accepted Accounting Principles	SharePoint/Financial Reporting
<b>August 1</b>	Board Member Roster (including Current Contact Information, i.e., phone number and email address)	SharePoint/Board Calendar and Roster
	Calendar of Board Meetings	SharePoint/Board Calendar and Roster
	Insurance Documents <ul style="list-style-type: none"> <li>• Certificate of Liability Insurance</li> <li>• Evidence of Property Insurance</li> </ul>	SharePoint/Evidence of Insurance  <b><u>AND</u></b>  Ball State University c/o Insurance Tracking Services, Inc. P.O. Box 20270 Long Beach, CA 90801 Email: bsu@instracking.com Fax: +1 (562) 435-2999
<b>October 1</b>	Lottery Waiting List	To be submitted via survey, sent before Oct 1.
	Submit Assessment Assurances	To be submitted via survey, sent before Oct 1.
<b>October 2</b>	October ADM Report (*when submitted to IDOE)	SharePoint/Financial Reporting
	An updated staffing matrix based on October ADM	SharePoint/Staffing Matrix
	An updated budget based on October ADM	SharePoint/Financial Reporting
	Key Contacts Information	SharePoint/Key Contact Sheet
<b>October 30</b>	1 <sup>st</sup> quarter financials for current fiscal year statements prepared in accordance with Generally Accepted Accounting Principles	SharePoint/Financial Reporting
<b>November 15</b>	Organizer shall submit a copy of its IRS Form 990 for previous fiscal year. <b><u>NOTE:</u></b> Due on the 15th day of the 5th month following the end of the tax year.	SharePoint/Financial Reporting

Required Annual Submissions		
Due Date	Document Description	Submit to:
	Organizer shall submit a copy of its Indiana NP-20 for previous fiscal year. <b>NOTE:</b> Due on the 15th day of the 5th month following the end of the tax year.	SharePoint/Financial Reporting
<b>January 30</b>	2 <sup>nd</sup> quarter financials for current fiscal year statements prepared in accordance with Generally Accepted Accounting Principles	SharePoint/Financial Reporting
<b>February 1*</b>	February ADM Report (*when submitted to IDOE)	SharePoint/Financial Reporting
<b>April 30</b>	3 <sup>rd</sup> quarter financials for current fiscal year statements prepared in accordance with Generally Accepted Accounting Principles	SharePoint/Financial Reporting
<b>June 30</b>	Projected budget (reflecting projected enrollment) for upcoming fiscal year	SharePoint/Financial Reporting
	Restraint/Seclusion Incident Report for current fiscal year	SharePoint/Restraint/Seclusion Incident Report
	Compliance List-Annual verification	SharePoint/Compliance Worksheet

**Required ONLY for Updated Items**

**All documents submitted to OCS OneDrive/Charter Agreement and Schedules and Policies Folder  
Please review these documents annually for any needed updates**

Note: All significant updates to Schedules to the Charter Agreement **require** a Request for Amendment to Charter Agreement (see attached) and supporting documentation be submitted to OCS **prior** to final approval of such updates. Below are noted those Schedules requiring informal amendments (**30 days' notice to OCS prior to updating the plan or policy**) or formal amendments (**a formal approval letter from OCS prior to updating the plan or policy**).

**Please review annually, if contract schedules are current, no actions is required.**

<b>Due November 15</b>	<b>Charter Agreement Schedules and Policies Folder</b>	<b>Contract Schedule</b>	<b>Amendment Type</b>
	Anti-Bullying Policy	24 or Virtual 25	Informal
	Conflict of Interest Policy	4 or Virtual 5	Formal
	Criminal Background Check Policy	17 or Virtual 18	Formal
	Curriculum and Instructional Methods	7 or Virtual 8	Informal
	Discipline Policy	24 or Virtual 25	Informal
	Elementary School Reading Plan	15 or Virtual 16	Formal
	Fundraising Policy (if applicable)	None	N/A
	Graduation Requirements, including diploma types offered (if applicable)	9 or Virtual 10	Formal
	Medication Policy	26 or Virtual 27	Informal
	Methods of Promoting Parent and Community Involvement Practices	14 or Virtual 15	Formal
Methods of Pupil Assessments	8 or Virtual 9	Informal	

Required ONLY for Updated Items			
	Mission and Purpose	1 or Virtual 2	Informal
	Onboarding and Student Engagement Policies (for virtual schools)	Virtual 11	Formal
	Organizational Chart (updated administrative organizational chart)	5 or Virtual 6	Informal
	Performance Evaluation Plan for Administrators and Teachers	19 or Virtual 20	Informal
	Personnel Plan, including Methods of Selection, Retention and Compensation of Employees ( <i>formal amendment required if change to management structure</i> )	18 or Virtual 19	Informal
	Plans and Programs as to Special Populations and At-Risk Students	13 or Virtual 14	Informal
	Policies and Procedures for Special Education	28 or Virtual 29	Formal
	Professional Development Methods	21 or Virtual 22	Informal
	Promotion/Retention Policy	9 or Virtual 10	Formal
	Responsibilities of Teachers and Staff ( <i>formal amendment required if change to management structure</i> )	16 or Virtual 17	Informal
	School Admission and Lottery Policy	10 or Virtual 11	Formal
	School Safety and Emergency Preparedness Plan	25 or Virtual 26	Informal
	Seclusion and Restraints Policy	24 or Virtual 25	Informal
	Social Media Policy (if applicable)	None	N/A
	Student Health Screening Policy	27 or Virtual 28	Informal
	Student Records Policy	11 or Virtual 12	Formal
	Supplemental Programs (Information on Current Student Clubs, Organizations, and Other Extracurricular Activities Offered (including athletic teams))	12 or Virtual 13	Informal
	Teacher and Staff Compensation and Benefits Plans	20 or Virtual 21	Informal
Transportation Policy (if applicable)	23 or Virtual 24	Informal	
November 15	<b>Organizational Documents Folder</b>		
	Articles of Incorporation (and any Amendments thereto)	2 or Virtual 3	Formal
	Any Fictitious Name Registrations/Certificate of Assumed Business Names filed with the Indiana Secretary of State	2 or Virtual 3	Formal
	Board By-Laws ( <i>Note: Please review to ensure compliance with BSU Policy regarding Organizer Governance</i> )	3 or Virtual 4	Formal
	ESP Agreement (together with all Amendments thereto, if applicable) ( <i>Note: Please review to ensure compliance with BSU Policy on Contracting with Educational Service Providers</i> )	6 or Virtual 7	Formal
	Lease Agreement(s) and/or Extension(s) or Deed(s) for All Occupied Facilities	22 or Virtual 23	Formal
	Certificate of Occupancy issued by the Indiana Department of Homeland Security		

## OFFICE OF CHARTER SCHOOLS Staff Directory

Name and Title	Phone	Email
Robert A. Marra Superintendent, University Schools Executive Director, Office of Charter Schools	Cell: 317-400-5249 Burris: 765-285-4372	ramarra@bsu.edu
Jamie Garwood Director	765-285-1347 Cell: 260-414-6378	jgarwood@bsu.edu
Keith A. Chandler Organizational and Compliance Coordinator	765-285-1357 Cell: 317-605-1209	kachandler@bsu.edu
Georgette Davis New School Development Coordinator	Cell: 765-717-1720	gdavis@bsu.edu
Jahma Gray Secretary	765-285-1337	jlgray@bsu.edu
Dawn Miller Academic Performance Coordinator	Cell: 765-748-6181	demiller4@bsu.edu
Marriette R. Sturm Fiscal Analyst	765-285-1343 Cell: 703-298-6487	mrsiler@bsu.edu