



**BALL STATE
UNIVERSITY**

MASTER CALENDAR OF REPORTING REQUIREMENTS

Ball State University-Authorized Charter Schools

2021-2022

Office of Charter Schools
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MASTER CALENDAR OF REPORTING REQUIREMENTS

The following includes deadlines for submitting key information to the Office of Charter Schools (OCS) at Ball State University for the 2021-2022 School Year. The calendar also outlines information that may not need to be submitted but that should be reviewed on an annual basis. ***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.***

Reports and/or documents required by the OCS are listed first, followed by the IDOE Calendar Process Checklist. ***Please note that some requirements may not apply to all schools. Requirements may vary slightly for schools opening this fall and schools in their second year of operation and beyond.***

Note: All documents are to be submitted to our data collection system, CSAPPHIRE: <https://csapphire.aws.bsu.edu>.

In addition, due to the sensitivity of information that is uploaded to CSAPPHIRE the University has locked down our server to provide additional security. Therefore, in order to access the served, we ask that users provide the IP range that they use to access this system. You can find the IP address for your location by going to <https://www.whatismyip.com>. Please forward this address to our office and we will see that your access to the system is completed. If you are new to this reporting system and need login permissions, please contact our office.

On or before August 1 of each school year:

School Permits and Certificates Folder, “Insurance” Subfolder

- Certificate of Liability Insurance (**Note: Please review to ensure compliance with Article XV of the Charter Agreement and effective dates are for the current school year**)
- Evidence of Property Insurance (**Note: Please review to ensure compliance with Article XV of the Charter Agreement effective dates are for the current school year**)

On or before October 1 of each school year:

- Report stating the manner in which the school plans to allocate its enrollment limit and the total enrollment for the school (annual folder/Enrollment and Grade Range Chart);
- An indication of the grades, if any, for which a lottery was held (annual folder/Lottery Waiting List);
- An updated staffing matrix that the school intends to utilize for the school year (annual folder/Staffing Matrix);
- An updated budget to reflect that planned staffing (annual folder/Financials and Budgets);
- Submit Assessment Assurances (annual folder/IDOE Academic Assessment Documents, Correspondence, Etc.); and
- Submit copies of Indiana Testing Security and Integrity Agreements signed by school personnel (annual folder/ IDOE Academic Assessment Documents, Correspondence, Etc.);

On or before November 15 of each school year:

Please review and/or upload to CSAPPHIRE the school’s most recent version of each of the following documents (**NOTE: if the document in CSAPPHIRE is the most recent version, no action is necessary.**):

Plans and Policies Folder

- Anti-Bullying Policy
- Conflict of Interest Policy
- Criminal Background Check Policy
- Curriculum and Instructional Methods
- Discipline Policy
- Elementary School Reading Plan
- Fundraising Policy
- Graduation Requirements, including diploma types offered (if applicable)
- Medication Policy
- Methods of Promoting Parent and Community Involvement Practices
- Methods of Pupil Assessments
- Mission and Purpose
- Onboarding and Student Engagement Policies (if applicable)
- Organizational Chart (updated administrative organizational chart)
- Performance Evaluation Plan for Administrators and Teachers
- Personnel Plan, including Methods of Selection, Retention and Compensation of Employees

- Plans and Programs as to Special Populations and At-Risk Students
- Policies and Procedures for Special Education
- Professional Development Methods
- Promotion/Retention Policy
- Responsibilities of Teachers and Staff
- School Admission and Lottery Policy
- School Safety and Emergency Preparedness Plan
- Seclusion and Restraints Policy
- Social Media Policy
- Staff Handbook
- Student Handbook
- Student Health Screening Policy
- Student Records Policy
- Supplemental Programs (Information on Current Student Clubs, Organizations, and Other Extracurricular Activities Offered (including athletic teams))
- Teacher and Staff Compensation and Benefits Plans
- Transportation Policy (if applicable)

Corporate Documents Folder

- Articles of Incorporation (and any Amendments thereto)
- Any Fictitious Name Registrations/Certificate of Assumed Business Names filed with the Indiana Secretary of State
- Board By-Laws (**Note: Please review to ensure compliance with BSU Policy regarding Organizer Governance**)
- Board Member List (including Current Contact Information, i.e., phone number and email address)
- Board Policy Manual (if applicable)
- Calendar of Board Meetings
- ESP Agreement (together with all Amendments thereto, if applicable) (Note: Please review to ensure compliance with BSU Policy on Contracting with Educational Service Providers)

School Permits and Certificates Folder, "Facility Leases" Subfolder

- Lease Agreement(s) and/or Extension(s) or Deed(s) for All Occupied Facilities

School Permits and Certificates Folder, "Inspections" Subfolder

- Certificate of Occupancy issued by the Indiana Department of Health

Reports due on the 15th each month per Monthly Reports per Section 17.02 of Contract (annual folder/Monthly Reports per Section 17.02 of Contract)

- The number of students suspended and/or expelled during the month;
- Documentation of changes in (i) the Organizer's certificate of occupancy for the Charter School's physical plant or (ii) other health and safety-related certifications or permits;
- Applications, filings, or Internal Revenue Service determinations related to seeking and maintaining the Organizer's tax-exempt status;
- Applications, filings or state determinations related to seeking and maintaining the Organizer's not-for-profit corporation status and/or active corporate status to do business in the state of Indiana;

- Lists and contact information of any individuals leaving or joining the Board of Directors and, for each person, an affirmative statement that the required background checks have been performed;
- Lists and contact information of any individuals who are resigning from or expecting to hold a leadership position in the operation of the Charter School, including any administrative position;
- The number of teachers hired, fired, laid off or who resigned; and
- Any conflict of interest issues that arose under Section 4.05 of the charter agreement or the Organizer's Conflict of Interest Policy and, if applicable during such month, the resolution of such issue.

Quarterly Reports. Within thirty (30) days after each quarter of each accounting year (*i.e.*, April 30, July 30, October 30, and January 30), financial statements prepared in accordance with Generally Accepted Accounting Principles.

On or before June 30 of each school year:

- Organizer shall submit the School Health Report. (annual folder/School Health Report)
- Organizer shall submit the Restraint/Seclusion Incident Report (annual folder/Restraint/Seclusion Incident Report)
- Organizer shall submit the School Audit Plan Documents (annual folder/School Audit Plan Documents)
- Organizer shall submit a copy of its IRS Form 990. **NOTE:** Annual exempt organization return: Due date. Form 990, 990-EZ, or 990-PF must be filed by the 15th day of the 5th month after the end of your organization's accounting period. (annual folder/Budgets and Financials/IRS Form 990 and IN Form NP-20 subfolder)
- Organizer shall submit a copy of its Indiana NP-20. **NOTE:** Due on the 15th day of the 5th month following the end of the tax year. (annual folder/Budgets and Financials/IRS Form 990 and IN Form NP-20 subfolder)

Projections. The Organizer shall provide the following projections:

- No later than June 1 prior to the upcoming Accounting Year - the projected budget (annual folder/Financials and Budgets);
- No later than July 1 prior to the commencement date of the upcoming school year - the school calendar (annual folder/School Calendar);
- No later than July 1 prior to the commencement date of the upcoming school year - the projected student enrollment, specifying expected number of students by grade level and school corporation of record (annual folder/Enrollment and Grade Range Chart); and

Enrollment Report. Not later than the date established by the Department for determining average daily membership, and after May 31, the Organizer shall submit to the Department, with a copy to the OCS Executive Director, any information required under Indiana Code § 20-24-7-2(a). (DOE Reports/September/Feb/ADM)

NWEA/Formative Assessment Reporting Dates (these are **NOT** CSAPPHIRE uploads)

On or before June 30, the school shall provide the Office of Charter Schools NWEA designee, currently the Executive Coordinator the School's NWEA (or other Formative Assessment) Student Growth Report to be incorporated in the University's Annual Accountability Report.