



**OFFICE of EDUCATION INNOVATION**

**MASTER CALENDAR  
OF REPORTING REQUIREMENTS**  
for Mayor-Sponsored Charter Schools

**2014 – 2015**

Office of the Mayor  
2501 City-County Building  
200 East Washington Street  
Indianapolis, Indiana 46202  
Telephone: 317. 327.3601  
[www.indy.gov/oei](http://www.indy.gov/oei)

**Overview**

The following calendar includes deadlines for submitting key information to the Office of Education Innovation (OEI) during the 2014-2015 school year. The requirements outlined in this calendar are not all-inclusive and are subject to change. OEI will attempt to notify all schools of changes in the calendar and/or reporting requirements and will give schools a reasonable period of time to meet any altered deadlines for providing information that the OEI requires. Required reports are listed based on the month due, and are no longer organized by framework area.

**All reporting requirements should be sent electronically by the 1st of each month to the OEI Compliance e-mail account at [OEICompliance@indy.gov](mailto:OEICompliance@indy.gov).**

**July 2014**

All documents listed for the month should be provided electronically by **July 1<sup>st</sup>** to [OEICompliance@indy.gov](mailto:OEICompliance@indy.gov).

	Quarterly Report using Excel template (Quarter 4)
	Updated roster for Board of Directors, including resumes and verification of background checks for any new members (only if new members have been added since May)
	Updated employee spreadsheet noting new hires, resignations, license numbers including expiration dates, permits and verification of background checks using attached template
	Updated 2014-15 Schedule of Board meetings (if necessary)
	Annual Compliance Letter using template (for 2013-14 school year)
	School calendar for upcoming school year
	School-Specific educational goal target percentages for the 2014-2015 school year
	Assessment calendar for 2014-15 school year
	Board approved 2014-15 budget
	Board-approved letter of engagement from accounting firm performing accrual based audit
	Submit verification of pre-audit planning meeting/activities in provided template
	Submit a copy of updated board policies
	Submit a copy of updated bylaws
	Submit a copy of updated Articles of Incorporation

**August 2014**

All documents listed for the month should be provided electronically by **August 1<sup>st</sup>** *but no later than 4 business days prior to the quarterly compliance meeting* to [OEICompliance@indy.gov](mailto:OEICompliance@indy.gov).

Please note that if financial data is received less than 4 business days prior to the scheduled meeting time, OEI reserves the right to take the following actions:

- 1) First occurrence: OEI will run the data but will provide a written warning
- 2) Second and subsequent occurrences: OEI will NOT run data prior to our meeting and will formally document the incident in the financial reporting requirements section of the performance framework

	Quarterly financial statement for 6/30/2014
	Electronic copy of Biannual Financial Statement (Form 9) submitted to the IDOE
	Submit new/updated insurance policies/certificates
	Financial summary for 2013-2014 fiscal year including a budget vs. actual analysis
	Documentation of loans or other debt outstanding for the charter school
	Submit a copy of 2014-2015 School Handbooks
	Submit evidence of school leader performance evaluation
	Organizational chart for 2014-15 school year (including all levels of school personnel)

**September 2014**

All documents listed for the month should be provided electronically by **September 1<sup>st</sup>** to [OEICompliance@indy.gov](mailto:OEICompliance@indy.gov).

	Board Approved Minutes – May, June and July meetings
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**October 2014**

All documents listed for the month should be provided electronically by **October 1<sup>st</sup>** to [OEICompliance@indy.gov](mailto:OEICompliance@indy.gov).

	Quarterly Report using Excel template (Quarter 1)
	Updated roster for Board of Directors, including resumes and verification of background checks for any new members (only if new members have been added since May)
	Updated employee spreadsheet noting new hires, resignations, license numbers including expiration dates, permits and verification of background checks using attached template
	Updated 2014-15 Schedule of Board meetings
	Excel version of DOE-ME Report including STN and <b>Grade Level</b>
	Excel version of DOE-SR Report including STN, Street Address, City, Zip Code, and <b>Grade Level</b>
	Excel version of final DOE-RT and DOE-STN from September 2014
	Excel version of DOE-LM Language Minority Report, which includes information on language minority students for the <b>2013-14 school year</b>
	Any necessary School-specific Educational Goal benchmark data

**November 2014**

All documents listed for the month should be provided electronically by **November 1<sup>st</sup>** *but no later than 4 business days prior to the quarterly compliance meeting* to [OEICompliance@indy.gov](mailto:OEICompliance@indy.gov).

- 1) Please note that if financial data is received less than 4 business days prior to the scheduled meeting time, OEI reserves the right to take the following actions First occurrence: OEI will run the data but will provide a written warning
- 2) Second and subsequent occurrences: OEI will NOT run data prior to our meeting and will formally document the incident in the financial reporting requirements section of the performance framework

	Quarterly financial statement for 9/30/2014
	Draft audit must be submitted to the SBOA by 11/30/13; accounting firm should CC <a href="mailto:OEICompliance@indy.gov">OEICompliance@indy.gov</a> on any communications with the SBOA.*

\*Note: Failure to submit the audit in a timely fashion or notify OEI that the audit has been submitted to SBOA will result in the delay being noted in the school's accountability report. Schools are expected to engage in vendor management to ensure that the deadline is met.



### December 2014

All documents listed for the month should be provided electronically by **December 1<sup>st</sup>** to [OEICompliance@indy.gov](mailto:OEICompliance@indy.gov).

	Board Approved Minutes – August, September and October meetings
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### January 2015

All documents listed for the month should be provided electronically by **January 1<sup>st</sup>** to [OEICompliance@indy.gov](mailto:OEICompliance@indy.gov).

	Quarterly Report (see enclosed template)
	Updated roster for Board of Directors, including resumes and verification of background checks for any new members (only if new members have been added since August)
	Updated employee spreadsheet noting new hires, resignations, license numbers including expiration dates, permits and verification of background checks using attached template
	Updated 2014-15 Schedule of Board meetings
	Excel copy of DOE-GR Graduation Report submitted to the IDOE for 2013 graduates
	ISTEP+, ECA and I-READ testing schedules for all grades / teachers
	Written documentation of recruitment strategies, application procedures, lottery, and wait list processes for the upcoming school year (including lottery date and location)
	Any necessary School-specific Educational Goal benchmark data

### February 2015

All documents listed for the month should be provided electronically by **February 1<sup>st</sup>** but *no later than 4 business days prior to the quarterly compliance meeting* to [OEICompliance@indy.gov](mailto:OEICompliance@indy.gov).

Please note that if financial data is received within 24 hours or less of the scheduled meeting time, OEI reserves the right to take the following actions:

- 1) First occurrence: OEI will run the data but will provide a written warning
- 2) Second and subsequent occurrences: OEI will NOT run data prior to our meeting and will formally document the incident in the financial reporting requirements section of the performance framework

	Quarterly financial statement for 12/31/2014
	Electronic copy of Biannual Financial Statement (Form 9) submitted to the IDOE

**March 2015**

All documents listed for the month should be provided electronically by **March 1<sup>st</sup>** to [OEICompliance@indy.gov](mailto:OEICompliance@indy.gov).

	Excel version of DOE-ME Report 2 (February count information)
	Electronic copy of DOE-SE Special Education Report submitted to the IDOE
	Any necessary School-specific Educational Goal benchmark data
	Board Approved Minutes – November, December and January meetings
	Updated roster for Board of Directors, including resumes and verification of background checks for any new members (only if new members have been added since November)
	Updated employee spreadsheet noting new hires, resignations, license numbers including expiration dates, permits and verification of background checks using attached template

**April 2015**

The following quarterly compliance documents are still required to be sent electronically to [OEICompliance@indy.gov](mailto:OEICompliance@indy.gov) by **April 1<sup>st</sup>**.

	Quarterly Report using Excel template (Quarter 3)
	Updated roster for Board of Directors, including resumes and verification of background checks for any new members (only if new members have been added since November)
	Updated employee spreadsheet noting new hires, resignations, license numbers including expiration dates, permits and verification of background checks using attached template
	Updated 2014-15 Schedule of Board meetings

**May 2015**

All documents listed for the month should be provided electronically by **May 1<sup>st</sup> but no later than 4 business days prior to the quarterly compliance meeting to [OEICompliance@indy.gov](mailto:OEICompliance@indy.gov)**.

Please note that if financial data is received less than 4 business days prior to the scheduled meeting time, OEI reserves the right to take the following actions

- 1) First occurrence: OEI will run the data but will provide a written warning
- 2) Second and subsequent occurrences: OEI will NOT run data prior to our meeting and will formally document the incident in the financial reporting requirements section of the performance framework

	Quarterly financial statement for 3/31/2015
	Projected budget for upcoming fiscal year which begins July 1 <sup>st</sup> , including number of enrolled students upon which the budget is based



**June 2015**

All documents listed for the month should be provided electronically by **June 1<sup>st</sup>** to [OEICompliance@indy.gov](mailto:OEICompliance@indy.gov).

	Board Approved Minutes – February, March and April meetings
	2015-16 Schedule of Board Meetings