

Fiscal Year 2024 Compliance Calendar for State-Authorized Charter Schools

Due Date	Request Title	Charter Agreement Provision	Definition	Submission Instructions
JULY				
7/1/2023	Annual Attendance Goal	Charter Agreement - Accountability System	Provide the school's annual attendance goal as a percentage (e.g., 96%) and a statement explaining the rationale for the school's attendance goal for the 2023-24 academic year. This goal will be compared to actual attendance as reported in the Illinois Report Card.	Fill in the Submission Tag indicating: <ul style="list-style-type: none"> • Annual Attendance Goal for the Coming School Year • Previous Year Attendance Rate Click the checkbox when complete.
7/1/2023	Board Bylaws	Charter Agreement - Maintenance of Corporate Status and Good Standing	Provide the most recent version of the approved board bylaws. This document should include any board policies or corollary documents, such as a code of ethics, conflict of interest policy, rules or policies on remote participation, etc.	Submit all requested items as a single PDF file.
7/1/2023	Most Recent Completed Evaluation of School Leader	Charter Agreement Exhibit - Accountability System	Provide the most recent completed evaluation of the school leader. This document should include, at a minimum, the evaluation date(s) and a summary of the evaluation and the designated performance for the school leader, such as a letter to the school leader or the performance summary provided to the full board of directors for consideration. <u>DO NOT provide only blank evaluation forms.</u>	Upload the most recent completed evaluation of the school leader, including all the required items as a single PDF file.
7/1/2023	Sample Contracts	Charter Agreement Exhibit - Accountability System	Provide redacted contracts for, at minimum, a member of teaching staff and a member of non-teaching staff. If applicable, include the school's current or most recent collective bargaining agreement.	Upload all requested items as a single PDF file.
7/1/2023	Special Education Policy and Procedures	Charter Agreement - Special Education	Provide the school's policy and procedures for identifying and serving diverse learners. <u>DO NOT submit only the ISBE Charter School Renewal Application for Special Education Services (Form 34-50B).</u>	Upload the school's policy and procedures as a single PDF file.

7/1/2023	Board Meeting Schedule	Charter Agreement - Governance and Operation	Provide a list of all board meetings held between July 1, 2023, and June 30, 2024. The list should also include the planned meeting times and locations. <u>NOTE: If your school changes board meeting dates after submission, please return to this location to provide the revised schedule as well as evidence of proper notice that complies with the Illinois Open Meetings Act (OMA).</u>	Upload a list of all board meetings to be held from July 1 to June 30 of the school year, including the time and location requirements. NOTE: if your school changes board meeting dates after submission, please upload the revised schedule, as well as evidence of proper notice in compliance with the Illinois OMA law. Provide website URL where notification of meetings, agenda, and minutes are posted. [(5 ILCS 120/2.02) (from Ch. 102, par. 42.2)]
7/1/2023	List of Current Board Members	Charter Agreement - Governance and Operation	Provide a list of all current board members. Denote the officers and parent member serving on the board. Provide contact information, including phone number and email, for at least the board president/chairperson.	Upload a list of all current board members, including all the required position and contact information, as a single file.
7/1/2023	Annual Board Member Conflict of Interest Disclosure Form	Charter Agreement - Governance and Operation	Board members fill out all areas of the Conflict of Interest form. Submissions will be rejected for the following reasons: A question is left blank and/or lack of signature on the form.	Submit all forms at once, either as one large PDF or individually by a board member.
7/1/2023	Parent-Teacher Advisory Meeting Schedule	Charter Agreement - Governance and Operation	Provide a list of all meetings held between July 1, 2023, and June 30, 2024. The list should also include the planned meeting times and locations. <u>NOTE: If your school changes meeting dates after submission, please provide the revised schedule as well as evidence of proper notice that complies with the Illinois OMA.</u>	Upload a list of all PTA meetings of the school year, including the time and location requirements, as a single file.
7/1/2023	List of Current Parent-Teacher Advisory Members	Charter Agreement - Governance and Operation	Provide a list of all current members. Denote the officers of the board and provide contact information, including phone number and email, for at least the chairperson.	Upload the list of all current PTA members, including the required position and contact information.
7/1/2023	Current Annual Budget	Charter Agreement - Finance	Provide the school budget, which should include a cash flow projection, for school year 2023-24 (FY 2024) as approved by the governing board. <u>NOTE: if your school amends its budget during the school year, please provide the revised budget whenever changes are made.</u>	Upload the school's budget as a single Excel file. NOTE: if your school amends its budget during the school year, upload the revised budget whenever changes are made.
7/1/2023	Current Facility Certification	Charter Agreement - Building	Provide the school's certificate of occupancy and/or, as applicable, the current lease or space sharing agreement for SY 2023-24.	Upload the school's certificate of occupancy and/or, as applicable, the lease or space sharing agreement.

7/1/2023	Current Liability Insurance	Charter Agreement - Insurance	Provide the certificate of insurance for the school that covers SY 2023-24.	Upload the certificate of insurance as a single file.
7/1/2023	Current Year Lottery Documentation	Charter Agreement - Enrollment	Provide the video of the school's lottery proceedings for students enrolling for the SY 2023-24 school year. Submit videos as hyperlinks pasted into the Lottery Video Submission template. <u>Please be aware that some file types may not be accepted by state-issued computers, so you may be asked to submit your video on a flash drive. If your school does not reach its enrollment cap and thus does not need to hold a lottery, please submit a completed Compliance Waiver Request in lieu of this item.</u>	Upload lottery results using the template provided. Upload the video of the school's lottery proceedings or provide hyperlinks to the video posted at the school's website.
7/1/2023	English Learner Policy and Procedures	Charter Agreement Exhibit - Accountability System	Provide the school's policies and procedures for identifying and serving English learners (ELs).	Upload the school's EL policies and procedures as a single PDF file.
7/1/2023	School Calendar	Charter Agreement - School Year School Days: Hours of Operation	Submit the school calendar no later than July 1 prior to the commencement of each academic year.	Submit the school calendar using the State Board's Public School Calendar System in IWAS.
7/15/2023	Current Strategic Action Plan/Remediation Plan	Charter Agreement Exhibit - Accountability System	Provide the school's current strategic action plan or remediation plan (if applicable). If your school does not have a strategic plan, prepare this submission using the Action Plan Driver Diagram to Theory of Action Tracker template. <u>If your school is not required to submit a strategic action plan (e.g., schools in "Good Standing"), please submit a completed Compliance Waiver Request in lieu of this item.</u>	Upload the school's current strategic action plan or remediation plan (if applicable). If your school does not have a strategic plan, prepare this submission using the Action Plan Driver Diagram to Theory of Action Tracker template.
7/29/2023	Previous School Year Fourth Quarter Financials	Charter Agreement - Finance	Provide the school's fourth quarter financial statements from a previous school year, including the statement of activities, cash flow statement, and balance sheet.	Upload the school's quarter financial statements as a single file.

AUGUST

8/1/2023	First Quarter Enrollment Certifications	Charter Agreement - Quarterly Enrollment Reports	Provide a completed and signed enrollment certification form, a complete enrollment list with addresses (including city of residence) for all students, and the current student waitlist and transfer list if applicable. If a waitlist or transfer list is not needed in a given quarter, provide a completed Compliance Waiver Request in lieu of this item.	Upload a completed and signed enrollment certification form for the quarter, a complete enrollment list in Excel format for all students, current student waitlist if applicable, and current student transfer list.
8/1/2023	Board Member OMA Certificates	Charter Agreement - Governance and Operation	Provide a current certificate of completion for the Illinois online OMA training for every board member. <u>Ensure that this submission aligns with the list of board members submitted previously.</u>	Upload the current certificate of completion for the Illinois online OMA training for every board member. Use the Requirement for the first Board Member. Add the remaining certificates using the Upload Submission Button found in Document Center.
8/1/2023	Current FOIA Officer Certificate	Charter Agreement - Governance and Operation	Each school must have an assigned Freedom of Information Act (FOIA) officer, who must annually complete the state's FOIA training online. Provide the current certificate of completion for the FOIA training course.	Upload the current annual certificate of completion for the FOIA training course.
8/1/2023	SY 2023-24 Student Handbook	Charter Agreement - Student Discipline	The student handbook should include, at a minimum, the school's policy on student discipline/student code of conduct and bullying prevention; the enrollment, transfer, and waitlist policies; and policies on student transportation, attendance, grievances, administration of medication, name and contact information of Title IX Coordinator, etc.	Upload the student handbook as a single file.
SEPTEMBER				
9/1/2023	Student Records Policy	Charter Agreement Exhibit - Accountability System	Provide the school's policy on student records.	Upload the school's policy on student records as a single file.
9/1/2023	Employee List	Charter Agreement - Personnel/Criminal Background Checks/Instructional Providers	Provide a list of all current employees, including name, Illinois Educator Identification Number (IEIN), position title, employment start date, and background checks information. Specify designated specialized staff, such as special education teachers, English learner staff, and paraprofessionals, etc. Ensure that subcontractors, such as school nurses, therapists, etc., are included.	Submit the list of all current employees using the template.

9/21/2023	First Quarter Administrative Fee	Charter Agreement - Finance	Pursuant to the Charter Schools Law, an operation fee will be assessed in an amount up to 3% of the state aid allotted for the fiscal year. ISBE will issue invoice for the operation fee on a quarterly basis.	Upon receiving the invoice, the school should submit payment to ISBE's fiscal office.
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OCTOBER

10/1/2023	Second Quarter Enrollment Certification	Charter Agreement - Quarterly Enrollment Reports	Review the enrollment report in SIS to ensure data is accurate.	Upload the current student waitlist, if applicable, and current student transfer list, if applicable.
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10/31/2023	Current Year First Quarter Financials	Charter Agreement - Finance	Provide the quarterly financials for the school's current fiscal year first quarter, including the statement of activities, cash flow statement, and balance sheet.	Upload the school's quarter financial statements in a single file.
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NOVEMBER

11/1/2023	Audited Financials	Charter Agreement - Finance	Provide the school's audited financials for the previous fiscal year. Schools that are part of a larger network should ensure that the individual campuses are considered. The Financial Audits shall include, without limitation, an opinion on the financial statements (and Supplementary Schedule of Expenditures of Federal Awards, if applicable); a report on compliance and on internal control over financial reporting based on an audit of financial statements performed in accordance with Government Accounting Standards; and a report on compliance with requirements of applicable laws and regulations, including the audit requirements contained in the Accountability Plan Government Accounting Standards.	Upload the school's audited financials in a single file. Upload the report on compliance with requirements of applicable laws and regulations.
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11/29/2023	Second Quarter Administrative Fee	Charter Agreement - Finance	Pursuant to the Charter Schools Law, an operation fee will be assessed in an amount up to 3% of the state aid allotted for the fiscal year. ISBE will issue invoice for the operation fee on a quarterly basis.	Submit payment to ISBE's fiscal office upon receiving the invoice.
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DECEMBER

12/1/2023	IRS Form 990	Charter Agreement - Finance	Provide the school's Form 990 when filed. If the school files for an extension, submit the extension filing along with the completed Compliance Waiver Request form in lieu of the 990 by the compliance due date. <u>Then submit the Form 990 when filed.</u>	Upload the school's Form 990.
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JANUARY

1/2/2024	Third Quarter Enrollment Certification	Charter Agreement - Quarterly Enrollment Reports	Provide a completed and signed enrollment certification form, a complete enrollment list with addresses (including city of residence) for all students, and the current student waitlist and transfer list if applicable. If a waitlist or transfer list is not needed in a given quarter, provide a completed Compliance Waiver Request in lieu of this item.	Upload a completed and signed enrollment certification form for the quarter, a complete enrollment list in Excel format for all students, current student waitlist if applicable, and current student transfer list.
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1/31/2024	Current Year Second Quarter Financials	Charter Agreement - Finance	Provide the quarterly financials for the school's current fiscal year second quarter, including the statement of activities, cash flow statement, and balance sheet.	Upload the school's quarter financial statements in a single file.
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1/31/2024	First Semester Board Minutes	Charter Agreement - Governance and Operation	Provide the minutes for all board meetings held from July 1, 2023, through December 31, 2023. Ensure that there are minutes for each of the meetings included in the list provided previously. <u>If meetings were held on dates different than those previously submitted, include not only the minutes but also evidence that proper notice of the date change was provided in accordance with the Illinois OMA.</u>	Upload the minutes for all meetings of the board held from July 1 through December 31.
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1/31/2024	Board Member Leadership Training	Charter Agreement - Governance and Operation	Within the first year of his or her term, every voting member of a charter school's board of directors or other governing body must complete a minimum of four hours of professional development leadership training. Each voting member of the charter school's board of directors or other governing body must complete a minimum of two hours of professional development training in these same areas in each subsequent year of his or her term.	Upload evidence of this training for each board member individually. Use the requirement for the first board member. Add the remaining evidence for EACH board member using the Submission Upload Button found in Document Center.
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FEBURARY

2/1/2024	Upcoming Year Lottery Notice and Application	Charter Agreement - Enrollment	Provide a link to the notice posted to the school website of a scheduled lottery date for notifying applicants of when the drawing will occur and a copy of the application for the next school year.	Upload a copy of the notice for the lottery for next school year, as well as a copy of the application for the next school year.
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2/27/2024	Third Quarter Administrative Fee	Charter Agreement - Finance	Pursuant to the Charter Schools Law, an operation fee will be assessed in an amount up to 3% of the state aid allotted for the fiscal year. ISBE will issue invoice for the operation fee on a quarterly basis.	Submit payment to ISBE's fiscal office upon receiving the invoice.
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MARCH

3/1/2024	Fourth Quarter Enrollment Certification	Charter Agreement - Quarterly Enrollment Reports	Review the enrollment report in SIS to ensure data is accurate.	Upload the current student waitlist, if applicable, and current student transfer list, if applicable.
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APRIL

4/17/2024	Updated Employee List	Charter Agreement - Personnel/Criminal Background Checks/Instructional Providers	Provide an updated list of all current employees, including name, IEIN, position title, employment start date, and background checks information. Specify designated specialized staff, such as special education teachers, English learner staff, and paraprofessionals, etc. Ensure that subcontractors, such as school nurses, therapists, etc., are included.	Submit the list of all current employees using the template.
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4/28/2024	Current Year Third Quarter Financials	Charter Agreement - Finance	Provide the quarterly financials for the school's current fiscal year third quarter, including statement of activities, cash flow statement, and balance sheet.	Upload the school's quarter financial statements in a single file.
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4/28/2024	Fourth Quarter Administrative Fee	Charter Agreement - Finance	Pursuant to the Charter Schools Law, an operation fee will be assessed in an amount up to 3% of the state aid allotted for the fiscal year. ISBE will issue invoice for the operation fee on a quarterly basis.	Submit payment to ISBE's fiscal office upon receiving the invoice.
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JUNE

6/30/2024	Second Semester Board Minutes	Charter Agreement - Governance and Operation	Provide the minutes for all meetings of the board held January 1, 2024, through June 30, 2024. Ensure that there are minutes for each of the meetings included in the list provided separately. <u>If meetings were held on dates different than those published, include not only the minutes but also evidence that proper notice of the date change was provided in accordance with the Illinois OMA.</u>	Upload the minutes for all meetings of the board held from January 1 through June 30.
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Note: If due date is on a weekend, submit your document(s) no later than the business day before the due date.