

## WI Charter Authorizer Annual Calendar of Reporting Requirements

This annual calendar of reporting requirements is designed to streamline the regulatory reporting process and help you to know what to expect each month. This calendar provides you with a roadmap detailing when the schools you authorize need to submit important academic, financial, and governance documents. It assists in enabling the schools to focus and pace their work each month and to make sure they are not missing important authorizer, state and federal reporting deadlines. This tool will help keep your work as an authorizer focused and organized.

Approx Due Date	Status	Required Submission	Submit To
<b>July</b>			
7/1		Approved School Calendar	Authorizer
7/15		Approved Board Meeting Minutes (June)	Authorizer
<b>August</b>			
8/1		School Accountability Progress Report: Progress in meeting educational goals	Authorizer
8/13		School Calendar Report (PI-1505): Days and hours of instruction	DPI and Authorizer
8/15		Approved Board Meeting Minutes (July)	Authorizer
8/20		4th Quarter Financial Statements	Authorizer
8/27		PI 1505 AC Aid Certification: Preliminary district revenue/expenditure data	DPI and Authorizer
<b>September</b>			
9/1		School Accountability Plan	Authorizer
9/1		Teacher/Staff Professional Development Plan	Authorizer
9/1		Large Vendor Contracts and Sub-Contracts (over \$5K)	Authorizer
9/15		Approved Board Meeting Minutes (August)	Authorizer
9/17		PI-1505 SE Special Ed Annual: Detailed special education expenditure data	DPI
9/17		PI-1505 Annual Report: Complete district revenue/expenditure data	DPI and Authorizer
9/30		WISEgrants Report: Final federal grant claims for the previous year	DPI

Approx Due Date	Status	Required Submission	Submit To
<b>October</b>			
10/1		School Level Annual Report (WISFIP): Financial Transparency Report of Per Pupil expenditures by Location	DPI
10/1		Independent Charter School Pupil Count Report (MC-1567): Identifies pupils present on count day	DPI and Authorizer
10/1		Wisconsin Forward Exam Results: State Student Assessment	Authorizer
10/15		Approved Board Meeting Minutes (September)	Authorizer
10/20		Annual Financial Audit	DPI and Authorizer
<b>November</b>			
11/1		NWEA MAP Fall Test Results	Authorizer
11/20		1 <sup>st</sup> Quarter Financial Statements	Authorizer
11/15		Approved Board Meeting Minutes (October)	Authorizer
11/30		School Accountability Report Cards	Authorizer
<b>December</b>			
12/1		WISEdata Finance Budget Snapshot: District's planned revenues & expenditures for the current year	DPI and Authorizer
12/15		Approved Board Meeting Minutes (November)	Authorizer
12/15		Annual Legislative Report	DPI and Legislature
<b>January</b>			
1/12		WISEstaff Report: Preliminary Staff Data	DPI
1/15		Approved Board Meeting Minutes (December)	Authorizer
<b>February</b>			
2/1		Independent Charter School Pupil Count Report (MC-1567): Identifies pupils present on count day	DPI and Authorizer
2/15		Approved Board Meeting Minutes (January)	Authorizer
2/15		NWEA MAP Winter Test Results	Authorizer
2/20		2 <sup>nd</sup> Quarter Financial Statements	Authorizer
<b>March</b>			
3/15		Approved Board Meeting Minutes (February)	Authorizer
3/23		WISEstaff Report: Final Staff Data	DPI
<b>April</b>			
4/15		Approved Board Meeting Minutes (March)	Authorizer

Approx Due Date	Status	Required Submission	Submit To
<b>May</b>			
5/1		Pupil Membership Audit	DPI and Authorizer
5/15		Approved Board Meeting Minutes (April)	Authorizer
5/20		3rd Quarter Financial Statements	Authorizer
5/15		NWEA MAP Spring Test Results	Authorizer
<b>June</b>			
6/1		WISEdata Finance Budget Snapshot: District's planned revenues & expenditures for the current year	DPI and Authorizer
6/15		Approved Board Meeting Minutes (May)	Authorizer
6/30		Board Meeting Schedule	Authorizer
6/30		Document of Public Notice for Board Meetings Open to the Public	Authorizer

### As Requested

Due Date	Submitted	Required Submission	Submit To
<b>As Requested</b>		Conflict of Interest Disclosure	Authorizer
		Reauthorization Materials	Authorizer
<b>Prior to Occupancy</b>		Building Certificate of Use and Occupancy	Authorizer
<b>Upon Posting/Notice</b>		Special Meeting Notice	Authorizer
		Board Meeting Cancellation Notice	Authorizer
		Changes to the Annual Calendar of Regularly Scheduled Meetings	Authorizer
		Short-Term Financing Agreements	Authorizer
<b>5 Business Day</b>		Litigation and Formal Proceedings	Authorizer
		Application and Enrollment Form	Authorizer
<b>30 Calendar Days Prior</b>		Long-Term Financing Documents	Authorizer
		Draft Educational Service Provider Agreements	Authorizer
		Draft Facility Lease Agreements	Authorizer
		Insurance Policies	Authorizer

## Notes

1. Independent Charter School Pupil Count Report (MC-1567):  
<https://dpi.wi.gov/parental-education-options/charter-schools/current/2r-membership>
2. Pupil Membership Audit:  
<https://dpi.wi.gov/sfs/finances/auditors/membership/overview>
3. WISEstaff Reporting: <https://dpi.wi.gov/cst/data-collections/staff/data-collection/staff>.
4. School Calendar Report (PI-1505):  
<https://dpi.wi.gov/sfs/reporting/calendar-days-hours-instruction>
5. School Level Annual Report (WISFIP): <https://dpi.wi.gov/sfs/reporting/slr>
6. School Accountability Report Cards: <https://dpi.wi.gov/accountability/report-cards>
7. Annual Legislative Report:  
<https://dpi.wi.gov/parental-education-options/charter-schools/information-authorizers#Annual%20Report%20to%20State%20Superintendent%20and%20Legislature>
8. Wisconsin Forward Exam: <https://dpi.wi.gov/assessment/forward>