

Due Date	Event/Document	Description (Must Haves)	Submitted for the LEA or Campus	Which Schools are Required to Submit?	DC PCSB Contact	Template in Epicenter?	Additional information outside DC PCSB
7/26/2016	2016-17 School Calendar	<p><i>Calendar must include the following:</i></p> <ul style="list-style-type: none"> -minimum 180 days of school (6+ hours)* -first and last day of school listed -start and end times listed -instructional days and holidays listed -make-up days for inclement weather listed -indicate staggered start dates if applicable If different campuses within the LEA have different calendar days, please make note on the calendar, or submit separate calendars for each campus <p>*If the school has received permission from DC PCSB to waive the 6-hour requirement, please make that notation on the school calendar. (Note: PK, K and adult ed programs excluded from 6-hour requirement)</p> <p>**All Adult Education Programs must include start and end dates for each semester and orientation period</p>	LEA	All Schools	Katie Dammann	No	
7/26/2016	Charter Board Calendar	List of all days the Board of Trustees is scheduled to meet for the 2016-2017 school year. This calendar must also include an assurance statement that the number of meetings is no fewer than what is stated in the school's bylaws.	LEA	All Schools	Katie Dammann	No	
7/26/2016	Student/Family Handbook	<p><i>Discipline Policy</i></p> <ul style="list-style-type: none"> -clear explanation of infractions and what leads to a suspension or expulsion -explanation of manifestation determination process for students with disabilities -due process and appeals procedures for parents if their child is issued a suspension or expulsion (Please note that advising parents to contact DC PCSB staff is not an acceptable step in your school's appeals process) <p>*Please note that mid-year changes to the portions of the discipline policy listed above require approval from DC PCSB and should be submitted into the "Discipline Policy" queue in Epicenter for review.</p> <p><i>Attendance Policy</i></p> <ul style="list-style-type: none"> -clear explanation of consequences of tardiness and absences -clear explanation of what constitutes an excused absence (including documentation required) -aligned with state law (i.e., truancy mandatory reporting, School Attendance Clarification Amendment Act of 2015) <p>-<i>Grievance Procedure</i> -- process for resolving parent/student complaints (Please note that advising parents to contact DC PCSB staff is not an acceptable step in your school's appeals process)</p> <p>-<i>Safeguard of Student Information Policy</i> --aligns with FERPA regulations</p>	LEA	All Schools	Katie Dammann	No	Attendance Act: http://www.dcpsb.org/pending-final-vote-dc-city-council/school-attendance-clarification-amendment-act-2015
7/26/2016	High School Course Offering	<p>This submission must include all courses and credits offered to high school students as well as the school's graduation requirements</p> <p><i>Note:</i> all schools should have the minimum DC graduation course requirements (unless already specified otherwise in the school's charter agreement). Any school that wishes to change their graduation requirements to require less than what OSSE mandates must submit a charter amendment request.</p>	Campus	High Schools	Katie Dammann	No	
7/26/2016	Goals and Assessments	An assurance letter confirming that the school received its goals and student achievement expectations (including assessments) and confirms that they are correct.	LEA	All Schools	Rashida Tyler/Emma McGann	Yes	
7/26/2016	Fire Drill Schedule	<p><i>Fire drill schedule</i></p> <ul style="list-style-type: none"> -Must include two drills within the first two weeks of the school year -monthly thereafter (total of 11 per year) 	Campus (1 for each facility)	All Schools	Katie Dammann	No	www.esa.dc.gov/service/submit-fire-drill-report
8/16/2016	Audited Financial Statement Engagement Letter - FY2016	Engagement letter between the school and its financial auditor, which must be a DC PCSB approved auditor.	LEA	All Schools	Mikayla Lytton	No	
8/31/2016	Monthly Financial Statements - FY2017	Schools are requested to use the provided template; those not using the template are expected to provide the same level of detail. Submissions that do not include all of the required information will be considered incomplete and rejected.	LEA	New Schools opening in SY 2016-2017; PCSB identified schools	Mikayla Lytton	Yes	New schools and those identified as Fiscal Low-Performers are required to submit monthly financial statements. All other schools are required to submit quarterly statements. Schools were informed of their reporting frequency via email by Mikayla Lytton, and can check their Epicenter queue for reference.

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9/6/2016	Annual Report	2015-16 Annual Report is one* document that includes: -Narrative (including goal attainment with a description of whether each charter goal was "met" or "missed" and evidence explaining why) -Data Report -Appendices (staff roster; board roster; financials) -Schools receive detailed instructions on the requirements for the Annual Report in the Annual Report Guidelines *Annual Reports submitted as more than one document will be returned for revisions	LEA	All Schools in operation during SY 2015-2016	Katie Dammann	No	
9/14/2016	Charter School Athletics Compliance	Assurance that appropriate medical/ trainer personnel are present at every interscholastic sporting event (fill out the template provided).	Campus	All schools that offer athletics	Marvin Cross	Yes	http://dcode.elaws.us/gateway/codepdf/title38/chapter38-6/1753-01-01/chapter38-6%281753-01-01%29.pdf
9/30/2016	Monthly Financial Statements - FY2017	Schools are requested to use the provided template; those not using the template are expected to provide the same level of detail. Submissions that do not include all of the required information will be considered incomplete and rejected.	LEA	New Schools opening in SY 2016-2017; PCSB identified schools	Mikayla Lytton	Yes	New schools and those identified as Fiscal Low-Performers are required to submit monthly financial statements. All other schools are required to submit quarterly statements. Schools were informed of their reporting frequency via email by Mikayla Lytton, and can check their Epicenter queue for reference.
9/30/2016	Adult Education PMF	Form indicating what assessments the school plans to administer for the current school year. Each adult education program must let DC PCSB know which assessments the school will be held accountable to for the Adult Education PMF.	Campus	Adult Education Schools	Rashida Tyler/Sareeta Schmitt	Yes	
9/30/2016	Professional Development Calendar (SY 2016-17)	Include all activities related to professional development. (OSSE will continue to execute Title 1 monitoring for SY 2016-17, transition year to ESSA. Updates on OSSE's monitoring framework will be provided at OSSE's September professional development session and related written guidance.)	LEA	Title 1 Schools	Emma McGann	No	
10/6/2016	School Emergency Response Plan	An assurance letter confirming that the school has established procedures, protocol and drills to respond to potential crises (i.e., fire, tornado, earthquake, hurricane, lockdown, active shooter, health outbreak/ communicable diseases). The plan must be aligned with the guidelines of agencies such as Fire and EMS, MPD, and CFSA.	Campus (1 for each facility)	All Schools	Audrey Williams	Yes	School Emergency Response Plan and Management Guide: http://esa.dc.gov/DC/ESA/Schools/Guides+and+Protocols/School+Emergency+Response+Plan+and+Management+Guide/School+Emergency+Response+Plan+and+Management+Guide+-+Full+Version+Fire+and+EMS : http://dc.gov/DC/FEMS/Fire+and+EMS+Department 202-673-3320
10/6/2016	Child Find Policy	An LEA's Child Find procedures should include, but are not limited to, a written description of: -how the LEA transitions students from Part C to Part B (if applicable to your student population) -public awareness and universal screening -identification/referral -evaluation and assessment -serving the student *Child Find Procedures apply to students 21 and under (Adult Education programs should also complete this requirement)	LEA	All Schools (DCPS Dependent LEAs should complete the assurance that they comply with DCPS's Child Find Policies and Procedures)	Avni Patel	Yes	http://osse.dc.gov/sites/default/files/dc/sites/osse/publication/attachments/finalcomprehensive_child_find_system_policy_3_22_2010.pdf
10/6/2016	SPED--Continuum of Services	Description of the school's continuum of services available to students with disabilities (template accurately filled out)	Campus	All Schools	Avni Patel	Yes	
10/6/2016	Certificate of Occupancy	Includes school name and current address; Occupancy load on form is equal to or greater than the sum of staff and students	Campus (1 for each facility)	All Schools	Katie Dammann	No	DCRA: http://dcra.dc.gov/service/zoning-certificates-occupancy 202-442-4400

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10/6/2016	Insurance Certificate	A school must have the insurance coverages included in its charter agreement with DC PCSB. (This usually includes general liability, directors and officers liability, umbrella coverage, property/lease insurance, auto liability insurance and workers compensation. The certificate should include all addresses/ campuses of an LEA.) *Please note that to participate in EdFEST, My School DC asks that schools add the District of Columbia as a covered entity to their policy for one day (December 10, 2016) and have a minimum insurance coverage of \$1M General Liability and \$3M Umbrella Coverage. Please note that a school will not be found out of compliance with DC PCSB if they do not meet the insurance requirements for EdFEST participation. Questions about this request can be directed to Aryan Bouquet at Aryan.bocquet@dc.gov.	LEA	All Schools	Katie Dammann	No	
10/6/2016	School Nurse Notification OR Certified Staff to Administer Medicine	DOH notice of assigned nurse on staff; OR copy of staff certificate to administer medications (not expired)	Campus	All Schools	Katie Dammann	No	
10/6/2016	Board Roster	Board makeup must include: -Odd number of voting members -Greater than 3 but no more than 15 -Majority of members residing in DC (include address OR city of residence) -Two parent members (voting members) *Please include all members' public email addresses **Adult schools may use alumnae or adult students to satisfy the parent requirement	LEA	All Schools	Katie Dammann	No	
10/6/2016	Litigation Proceedings Calendar	Includes schedule of litigation or federal complaints issued against the school, including: SPED-related legal proceedings, settlement agreements, and hearing officer decisions pending or occurring in the past school year; federal complaints issued against the school within the past year; or non-applicable memo. *In addition to this annual requirement, please note schools are required to notify PCSB within seven days of receiving any new complaint	LEA	All Schools	Katie Dammann	No	
10/6/2016	Board Meeting Minutes-- 1st Quarter	Minutes from all board meetings held/ approved between July and October 2016; should reflect decisions made by the Board that are consistent with the Charter granted to the school, the School Reform Act, and applicable law	LEA	All Schools	Katie Dammann	No	
10/6/2016	Sexual Violation Protocol	An assurance letter confirming that the school's policy regarding sexual violations has been read by all staff members. This letter should confirm staff's understanding of their obligation for reporting sexual abuse of students.	Campus	All Schools	Katie Dammann	No	
10/6/2016	Staff Roster & Background Checks	Staff/volunteer name, position, indication that background check has been conducted *All volunteers working more than 10 hrs/ week must have background checks	Campus	All Schools	Katie Dammann	Yes	
10/6/2016	Employee Handbook (or submit individual policies)	Includes school board-approved policies around compliance with applicable employment laws including: -sexual harassment -equal opportunity -drug-free workplace -staff complaint Resolution Process -whistle blower Policy (<i>best practice, not mandatory</i>)	LEA	All Schools	Katie Dammann	No	
10/6/2016	Accreditation	Letter and/or license of accreditation; or memo explaining where in the process the school is (undergoing accreditation); Schools not yet 5 years old may submit an N/A memo if they have not begun the accreditation process *ALL schools in operation for five years or more must be accredited or may be subject to board action per DC PCSB's Accreditation Policy	LEA	All Schools	Katie Dammann	No	
10/6/2016	Lease	The school's most up to date lease	Campus (1 for each facility)	New Schools, Schools in a new facility Schools with a new lease agreement	Katie Dammann	No	

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10/6/2016	Staff Preference	Assurance letter stating that enrollment based on staff preference is limited to 10% of the total student population and enrollment based on founder preference is limited to no more than 10% of the school's total enrollment or to 20 students, whichever is less. *If your school does not enact staff or founder preference, please also submit an assurance letter making that clear	LEA	All Schools	Katie Dammann	No	
10/6/2016	ELL	Please complete the checklist confirming the school's compliance with laws and regulations related to the education of English Language Learners (please note that the entire checklist must be completed)	LEA	All Schools	Katie Dammann	Yes	
10/6/2016	ADA	Assurance that the facility is ADA compliant OR if it is not, how the school will meet the needs of students, staff, and community stakeholders who may require accommodations to access the facility.	Campus	All Schools	Katie Dammann	Yes	
10/6/2016	Title IX	Assurance letter confirming the school's compliance with laws and regulations related to Title IX.	LEA	All Schools	Katie Dammann	Yes	
10/6/2016	Articles of Incorporation	Articles of Incorporation	LEA	Schools Opening in SY 16-17	Avni Patel	No	
10/6/2016	Board Bylaws	Board Bylaws	LEA	Schools Opening in SY 16-17	Avni Patel	No	
10/6/2016	Lead	An assurance from an independent entity confirming that water based lead levels in the building are safe for staff and students	Campus	Schools operating in new facilities during SY 16-17	Katie Dammann	No	
10/31/2016	Monthly Financial Statements - FY2017	Schools are requested to use the provided template; those not using the template are expected to provide the same level of detail. Submissions that do not include all of the required information will be considered incomplete and rejected.	LEA	New Schools opening in SY 2016-2017; PCSB identified schools	Mikayla Lytton	Yes	New schools and those identified as Fiscal Low-Performers are required to submit monthly financial statements. All other schools are required to submit quarterly statements. Schools were informed of their reporting frequency via email by Mikayla Lytton, and can check their Epicenter queue for reference.
10/31/2016	Quarterly Financial Statements - FY2017	Schools are requested to use the provided template; those not using the template are expected to provide the same level of detail. Submissions that do not include all of the required information will be considered incomplete and rejected.	LEA	PCSB identified schools	Mikayla Lytton	Yes	New schools and those identified as Fiscal Low-Performers are required to submit monthly financial statements. All other schools are required to submit quarterly statements. Schools were informed of their reporting frequency via email by Mikayla Lytton, and can check their Epicenter queue for reference.
11/30/2016	Monthly Financial Statements - FY2017	Schools are requested to use the provided template; those not using the template are expected to provide the same level of detail. Submissions that do not include all of the required information will be considered incomplete and rejected.	LEA	New Schools opening in SY 2016-2017; PCSB identified schools	Mikayla Lytton	Yes	New schools and those identified as Fiscal Low-Performers are required to submit monthly financial statements. All other schools are required to submit quarterly statements. Schools were informed of their reporting frequency via email by Mikayla Lytton, and can check their Epicenter queue for reference.
12/8/2016	2017-2018 Student Application	<i>Application may only ask:</i> student name, date of birth, grade level, address, gender, siblings currently attending school; parent/guardian name, parent/guardian address, parent/ guardian phone number Application may NOT contain questions referring to IEPs or SPED, birth certificate, report cards, nationality, race, language, interview *should include a non-discrimination clause	LEA	Schools not participating in My School DC	Katie Dammann	No	
12/8/2016	Student Enrollment Forms	A list of all required documentation or forms schools request of families for a student to enroll at the school (after the student has already been accepted)	LEA	All Schools	Katie Dammann	No	http://www2.ed.gov/about/offices/list/ocr/docs/qa-201405.pdf
12/8/2016	2017-2018 Lottery Procedures	Lottery date; explanation of provisions for waitlisted students; provisions for notifying students of placement	LEA	Schools not participating in My School DC	Katie Dammann	No	
12/8/2016	Fire Drills Conducted	List of dates the school has conducted a fire drill thus far in the year AND tentative dates for drills for remainder of year	Campus (1 for each facility)	All Schools	Katie Dammann	No	www.esa.dc.gov/service/submit-fire-drill-report

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12/15/2016	Facilities Expenditure Template	Reporting of facilities expenditure actives via DC PCSB's data input tool. The data gathered is in the development of the public charter school sector budget for the subsequent fiscal year. Please complete and submit the template provide. It must be submitted in Excel.	LEA	All Schools	Mikayla Lytton	Yes	
12/30/2016	Monthly Financial Statements - FY2017	Schools are requested to use the provided template; those not using the template are expected to provide the same level of detail. Submissions that do not include all of the required information will be considered incomplete and rejected.	LEA	New Schools opening in SY 2016-2017; PCSB identified schools	Mikayla Lytton	Yes	New schools and those identified as Fiscal Low-Performers are required to submit monthly financial statements. All other schools are required to submit quarterly statements. Schools were informed of their reporting frequency via email by Mikayla Lytton, and can check their Epicenter queue for reference.
1/19/2017	Board Meeting Minutes-- 2nd Quarter	Minutes from all board meetings held/ approved between October 2016 and January 2017; should reflect decisions made by the Board that are consistent with the Charter granted to the school, the School Reform Act, and applicable law	LEA	All Schools	Katie Dammann	No	
1/31/2017	Monthly Financial Statements - FY2017	Schools are requested to use the provided template; those not using the template are expected to provide the same level of detail. Submissions that do not include all of the required information will be considered incomplete and rejected.	LEA	New Schools opening in SY 2016-2017; PCSB identified schools	Mikayla Lytton	Yes	New schools and those identified as Fiscal Low-Performers are required to submit monthly financial statements. All other schools are required to submit quarterly statements. Schools were informed of their reporting frequency via email by Mikayla Lytton, and can check their Epicenter queue for reference.
1/31/2017	Quarterly Financial Statements - FY2017	Schools are requested to use the provided template; those not using the template are expected to provide the same level of detail. Submissions that do not include all of the required information will be considered incomplete and rejected.	LEA	PCSB identified schools	Mikayla Lytton	Yes	New schools and those identified as Fiscal Low-Performers are required to submit monthly financial statements. All other schools are required to submit quarterly statements. Schools were informed of their reporting frequency via email by Mikayla Lytton, and can check their Epicenter queue for reference.
2/16/2017	IRS Form 990 or Extension FY2016	Form 990 is the tax return form that non-profits use to report their charitable receipts for the year. A form 990 is to be used by any 501(c) organization.	LEA	All Schools	Marvin Cross	No	
2/28/2017	Monthly Financial Statements - FY2017	Schools are requested to use the provided template; those not using the template are expected to provide the same level of detail. Submissions that do not include all of the required information will be considered incomplete and rejected.	LEA	New Schools opening in SY 2016-2017; PCSB identified schools	Mikayla Lytton	Yes	New schools and those identified as Fiscal Low-Performers are required to submit monthly financial statements. All other schools are required to submit quarterly statements. Schools were informed of their reporting frequency via email by Mikayla Lytton, and can check their Epicenter queue for reference.
3/31/2017	Monthly Financial Statements - FY2017	Schools are requested to use the provided template; those not using the template are expected to provide the same level of detail. Submissions that do not include all of the required information will be considered incomplete and rejected.	LEA	New Schools opening in SY 2016-2017; PCSB identified schools	Mikayla Lytton	Yes	New schools and those identified as Fiscal Low-Performers are required to submit monthly financial statements. All other schools are required to submit quarterly statements. Schools were informed of their reporting frequency via email by Mikayla Lytton, and can check their Epicenter queue for reference.
4/4/2017	Waitlist Information for 2017-2018	This submission requires schools to submit SY17-18 waitlist data by campus and grade as of the release of the Common Lottery results on March 31, 2017 (regardless of whether your school participates in My School DC's (MSDC's) Common Lottery. Schools can comply with this submission in three ways: 1. If your school doesn't have a waitlist as of March 31, 2017 date, please submit an N/A memo provided in Epicenter. 2. If your school participates in the Common Lottery and would like to have MSDC share your waitlist data with DC PCSB, please upload to Epicenter a letter of assurance authorizing MSDC to share waitlist data directly with DC PCSB on your behalf. There is no standard language for the letter of assurance, but it could include "[LEA name] gives My School DC permission to share waitlist data for the SY17-18 Common Lottery directly with DC PCSB." 3. Otherwise, please upload to Epicenter your waitlist data by campus and grade using the template provided in Epicenter.	Campus	All PK-12 Schools (Adult and Alternative Schools are exempt)	Chelsea Coffin	Yes	

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4/18/2017	Board Meeting Minutes-- 3rd Quarter	Minutes from all board meetings held/ approved between January and April 2017; should reflect decisions made by the Board that are consistent with the Charter granted to the school, the School Reform Act, and applicable law	LEA	All Schools	Katie Dammann	No	
4/27/2017	Preliminary School Calendar	The preliminary school calendar must include first and last day of school, dates of winter break, and dates of spring break.	LEA	All Schools	Katie Dammann	No	
4/28/2017	Monthly Financial Statements - FY2017	Schools are requested to use the provided template; those not using the template are expected to provide the same level of detail. Submissions that do not include all of the required information will be considered incomplete and rejected.	LEA	New Schools opening in SY 2016-2017; PCSB identified schools	Mikayla Lytton	Yes	New schools and those identified as Fiscal Low-Performers are required to submit monthly financial statements. All other schools are required to submit quarterly statements. Schools were informed of their reporting frequency via email by Mikayla Lytton, and can check their Epicenter queue for reference.
4/28/2017	Quarterly Financial Statements - FY2017	Schools are requested to use the provided template; those not using the template are expected to provide the same level of detail. Submissions that do not include all of the required information will be considered incomplete and rejected.	LEA	PCSB identified schools	Mikayla Lytton	Yes	New schools and those identified as Fiscal Low-Performers are required to submit monthly financial statements. All other schools are required to submit quarterly statements. Schools were informed of their reporting frequency via email by Mikayla Lytton, and can check their Epicenter queue for reference.
5/31/2017	Monthly Financial Statements - FY2017	Schools are requested to use the provided template; those not using the template are expected to provide the same level of detail. Submissions that do not include all of the required information will be considered incomplete and rejected.	LEA	New Schools opening in SY 2016-2017; PCSB identified schools	Mikayla Lytton	Yes	New schools and those identified as Fiscal Low-Performers are required to submit monthly financial statements. All other schools are required to submit quarterly statements. Schools were informed of their reporting frequency via email by Mikayla Lytton, and can check their Epicenter queue for reference.
6/1/2016	Annual Budget 2017-2018	Budget that is prepared for the 12-month period July 1 thru June 30. The annual budget outlines both the income and expenditures that are expected to be received and paid over the coming year.	LEA	All Schools	Mikayla Lytton	Yes	
6/30/2017	Monthly Financial Statements - FY2017	Schools are requested to use the provided template; those not using the template are expected to provide the same level of detail. Submissions that do not include all of the required information will be considered incomplete and rejected.	LEA	New Schools opening in SY 2016-2017; PCSB identified schools	Mikayla Lytton	Yes	New schools and those identified as Fiscal Low-Performers are required to submit monthly financial statements. All other schools are required to submit quarterly statements. Schools were informed of their reporting frequency via email by Mikayla Lytton, and can check their Epicenter queue for reference.
7/11/2017	Board Meeting Minutes-- 4th Quarter	Minutes from all board meetings held/ approved between April and July 2017; should reflect decisions made by the Board that are consistent with the Charter granted to the school, the School Reform Act, and applicable law	LEA	All Schools	Katie Dammann	No	
7/31/2017	Monthly Financial Statements - FY2017	Schools are requested to use the provided template; those not using the template are expected to provide the same level of detail. Submissions that do not include all of the required information will be considered incomplete and rejected.	LEA	New Schools opening in SY 2016-2017; PCSB identified schools	Mikayla Lytton	Yes	New schools and those identified as Fiscal Low-Performers are required to submit monthly financial statements. All other schools are required to submit quarterly statements. Schools were informed of their reporting frequency via email by Mikayla Lytton, and can check their Epicenter queue for reference.
7/31/2017	Quarterly Financial Statements - FY2017	Schools are requested to use the provided template; those not using the template are expected to provide the same level of detail. Submissions that do not include all of the required information will be considered incomplete and rejected.	LEA	PCSB identified schools	Mikayla Lytton	Yes	New schools and those identified as Fiscal Low-Performers are required to submit monthly financial statements. All other schools are required to submit quarterly statements. Schools were informed of their reporting frequency via email by Mikayla Lytton, and can check their Epicenter queue for reference.
On-going; no later than 3 days after the contract is made	Procurement Contracts	Supporting documents and required documentation.	LEA	All schools	Charlene Haigler-Mickles	Yes	