# Charter School Annual Certification of Information for Fiscal Year 2025–26

**Instruction Guide**
Version 1.0



California Department of Education
Charter Schools Division
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## Revision History

| **Version Number** | **Revision Date** | **Section(s)** | **Summary of Changes** |
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## Contents

[Charter School Annual Certification of Information for Fiscal Year 2025–26 1](#_Toc197940197)

[Revision History 2](#_Toc197940198)

[Contents 3](#_Toc197940199)

[Background 4](#_Toc197940200)

[Glossary 5](#_Toc197940201)

[Instructions for Completing the Certification of Information 6](#_Toc197940202)

[Section 1. Charter School Information 7](#_Toc197940203)

[Section 2. Chartering Authority Information 8](#_Toc197940204)

[Section 3. Operations and Facilities 9](#_Toc197940205)

[Section 4. Program Information 12](#_Toc197940206)

[Section 5. Additional Information 15](#_Toc197940207)

[Section 6. Acknowledgment and Certification 16](#_Toc197940208)

[Saving and Submitting 17](#_Toc197940209)

## Background

Charter schools annually certify the information on file with the California Department of Education (CDE) for the upcoming fiscal year through the Charter School Certification of Information (COI) process.

This year, the COI has been transitioned to a Snap Survey format for improved accessibility and ease of use. Comprehensive instructions for completing the COI and navigating the Snap Survey (also referred to as “COI Form” or “Form”) are included in this guidance document.

The data reported and certified by charter schools through the COI serve several purposes. The data help inform state education policy, contribute to required reporting for the U.S. Department of Education, and support charter school authorization, oversight, and accountability. Additionally, the data promote transparency across California’s public education system by ensuring that accurate, up-to-date information about charter schools is publicly available and consistently maintained.

## Glossary

Below is an alphabetical list of acronyms, initialisms, and terms that are referenced throughout the Certification of Information:

* CALPADS: California Longitudinal Pupil Achievement Data System
* CBEDS: California Basic Educational Data System
* *CCR*: *California Code of Regulations*
* CDE: California Department of Education
* COE: County Office of Education
* COI: Certification of Information
* CSA: Charter School Administrator
* CSSEA: Charter School Special Education Administrator
* *EC*: California *Education Code*
* ECHS: Early College High School
* EIN: Employer Identification Number
* FPC: For-Profit Corporation
* FY: Fiscal Year
* IRC: Independently Reporting Charters
* LCFF: Local Control Funding Formula
* LEA: Local Educational Agency
* MCHS: Middle College High School
* NPPBC: Non-Profit Public Benefit Corporation
* PCCA: Primary Contact at the Chartering Authority
* PK: Prekindergarten
* SBE: California State Board of Education
* SELPA: Special Education Local Plan Area
* TK: Transitional Kindergarten
* UEI: Unique Entity Identifier

## Instructions for Completing the Certification of Information

The COI Form consists of six sections and approximately 46 questions or multi-part responses. All fields are required unless otherwise indicated.

Specifically, the COI contains the following sections:

* [Section 1. Charter School Information](#_Section_1._Charter)
* [Section 2. Chartering Authority Information](#_Section_2._Chartering)
* [Section 3. Operations and Facilities](#_Section_3._Operations)
* [Section 4. Program Information](#_Section_4._Program)
* [Section 5. Additional Information](#_Section_5._Additional)
* [Section 6. Acknowledgement and Certification](#_Section_6._Acknowledgment)

Once you begin the Form, you can save and return to it at any time by selecting the **Save For Later** button at the bottom of each page. You will be provided a unique URL (web address) for entrance back into the Form. This URL is the only way back into the saved Form. Please note that the Save For Later button should only be selected if you are taking a break from filling out the Form; it is not necessary to select the Save For Later button each time before selecting the **Next** button.

To return to a previous page of the Form, use the **Back** button located at the bottom of the page; do not use the web browser’s back button. Using the web browser’s back button may cause an error on the Form; if this error occurs, use the refresh button on the web browser.

You will have the opportunity to print a copy of the Form for your records before submitting it.

For questions or to report a problem with the Form, email charters@cde.ca.gov.

### Section 1. Charter School Information

**Charter School Name**

* Charter School Name
* Is this different from the charter school's name in Fiscal Year (FY) 2024–25?
	+ If Yes, provide the following:
		- Charter School Name in FY 2024–25
		- Effective Date of the New Name (format as MM/DD/YYYY)
		- Charter School Number (format as four digits)
		- County-District-School (CDS) Code (format as 14 digits without spaces or hyphens)

**Charter School Location**

* Physical Street Address
* City
* Zip Code + 4 (format as 99999-9999) (look up four-digit extension at [USPS Look Up a ZIP Code](https://tools.usps.com/zip-code-lookup.htm?byaddress))
* County of Location (select from the drop-down menu)
* Grade Levels to be Served in FY 2025–26 (check all boxes that apply)
	+ Prekindergarten/Transitional Kindergarten to Grade 13+
* Projected Enrollment for 2025–26

**Charter School Administrator (CSA) Information**

* First Name
* Last Name
* Job Title
* Email
* Phone (format as 999-999-9999)
* Phone Extension (optional)

### Section 2. Chartering Authority Information

**Chartering Authority Name**

* Chartering Authority Name
* Chartering Authority County of Location (select from drop-down menu)
* Is the charting authority a county office of education (COE)?
	+ If Yes, Provide the School District in which the Charter School is geographically located

**Superintendent Information**

* First Name
* Last Name
* Email
* Phone (format as 999-999-9999)
* Phone Extension (optional)

**Primary Contact at the Chartering Authority (PCCA)**

***Note:*** *The PCCA* *may be the Superintendent or another designated individual within the school district or county office of education responsible for the authorization and oversight of the charter school.*

* First Name
* Last Name
* Job Title
* Email
* Phone (format as 999-999-9999)
* Phone Extension (optional)

### Section 3. Operations and Facilities

#### Organization Type

Select one of the following:

* For-profit corporation, as outlined in [California *Education Code* (*EC*) Section 47604(b)(2)(A)](https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?sectionNum=47604&lawCode=EDC)
* Non-profit public benefit corporation, as outlined in [*EC* Section 47604(a)](https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?sectionNum=47604&lawCode=EDC)
* Governing board of the chartering authority

**For-Profit Corporation**

If For-Profit Corporation (FPC) is selected, provide all information as it is reported on the [California Secretary of State Business Search Feature](https://bizfileonline.sos.ca.gov/search/business):

* Name of the FPC
* Principal (Physical) Street Address
* Principal (Physical) City
* Principal (Physical) State
* Principal (Physical) Zip + 4 (format as 99999-9999) (look up four-digit extension at [USPS Look Up a ZIP Code](https://tools.usps.com/zip-code-lookup.htm?byaddress))
* Mailing Street Address
* Mailing City
* Mailing State
* Mailing Zip + 4 (format as 99999-9999) (look up four-digit extension at [USPS Look Up a ZIP Code](https://tools.usps.com/zip-code-lookup.htm?byaddress))
* Does the FPC operate or manage more than one charter school?

**Non-Profit Public Benefit Corporation**

If Non-Profit Public Benefit Corporation (NPPBC) is selected, provide all information as it is reported on the [California Secretary of State Business Search Feature](https://bizfileonline.sos.ca.gov/search/business):

* Name of the NPPBC
* Principal (Physical) Street Address
* Principal (Physical) City
* Principal (Physical) State
* Principal (Physical) Zip + 4 (format as 99999-9999) (look up four-digit extension at [USPS Look Up a ZIP Code](https://tools.usps.com/zip-code-lookup.htm?byaddress))
* Mailing Street Address
* Mailing City
* Mailing State
* Mailing Zip + 4 (format as 99999-9999) (look up four-digit extension at [USPS Look Up a ZIP Code](https://tools.usps.com/zip-code-lookup.htm?byaddress))
* Nine-digit Employer Identification Number (EIN) of the organization as reported on the [Internal Revenue Service Exempt Organizations Business Master File Extract](https://www.irs.gov/charities-non-profits/exempt-organizations-business-master-file-extract-eo-bmf) (format as nine digits without spaces or hyphens)
* Does the NPPBC operate or manage more than one charter school?

#### Governing Board Details

* Describe the process by which the charter school's governing board members are determined, such as by appointment, by vote, etc. Include the number of school interest holders on the board, the number of outside interest holders, the specific roles of the interest holders, etc. (1,000-character max; count characters used)
* Total Number of Charter School Governing Board Members
* Governing Board President/Chair Information
	+ First Name
	+ Last Name
	+ Email
	+ Phone (format as 999-999-9999)
	+ Phone Extension (optional)
	+ Beginning Term Date (format as MM/DD/YYYY)
	+ Ending Term Date (format as MM/DD/YYYY)

#### Facilities

* Will the charter school occupy district facilities in an agreement as outlined in [*EC* Section 47614](https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?sectionNum=47614.&lawCode=EDC)?
	+ If Yes, Select the following facility cost agreement between the district and the charter school as required by [*California Code of Regulations*, Title 5 Section 11969.7(e)](https://govt.westlaw.com/calregs/Document/I3CC8EA834C6911EC93A8000D3A7C4BC3?viewType=FullText&listSource=Search&originationContext=Search+Result&transitionType=SearchItem&contextData=(sc.Search)&navigationPath=Search/v1/results/navigation/i0ad62d2e0000018f3aadbf010c0411dc?ppcid=d1930b2fd2a34255adc16909ab475b21&Nav=REGULATION_PUBLICVIEW&fragmentIdentifier=I3CC8EA834C6911EC93A8000D3A7C4BC3&startIndex=1&transitionType=SearchItem&contextData=%2528sc.Default%2529&originationContext=Search%2520Result&list=REGULATION_PUBLICVIEW&rank=1&t_T1=5&t_T2=11969.7&t_S1=CA+ADC+s) (select all that apply)
		- Three percent (3%) supervisorial oversight fee
		- Two percent (2%) supervisorial oversight fee
		- Cost per square foot and total cost
		- Rent or other fee
		- Other fee or arrangement (describe)

#### Additional Sites

* Other than the main site indicated in Section 1, indicate the number of additional sites, facilities, locations, offices, administrative offices, campuses, buildings, suites, satellites, and/or resource centers (collectively referred to as “sites”) affiliated with the charter school (select from the drop-down menu)
	+ If More than 3, Indicate the Total Number of Additional Sites (not including the main site indicated in Section 1)
* For Each Additional Site (up to three sites)
	+ Site Name
	+ Physical Street Address
	+ Physical City
	+ Physical Zip + 4 (format as 99999-9999) (look up four-digit extension at [USPS Look Up a ZIP Code](https://tools.usps.com/zip-code-lookup.htm?byaddress))
	+ District of Location
	+ Primary Contact First Name
	+ Primary Contact Last Name
	+ Primary Contact Job Title
	+ Primary Contact Email
	+ Primary Contact Phone (format as 999-999-9999)
	+ Primary Contact Phone Extension (optional)
	+ County of Location
	+ Type of Facility
		- Instructional
		- Non-Instructional Administrative Office
		- Other (describe, e.g., Storage, Media Center, Board Room, etc.)

### Section 4. Program Information

#### Funding Type

* **Direct Funded:** Local Control Funding Formula (LCFF) apportionment funds for a directly funded charter school flow directly to the county treasurer and then to the charter school.
* **Locally Funded:** LCFF apportionment funds are calculated separately for a locally funded charter school; funds flow through its chartering authority.

Additional information about funding types is available at [CDE Charter School Funding Types](https://www.cde.ca.gov/sp/ch/directfundopt.asp).

#### Data Reporting Type

* **Independent:** The charter school reports California Longitudinal Pupil Achievement Data System (CALPADS) and California Basic Educational Data System (CBEDS) data directly to the CDE, independent of its authorizing agency. Charter schools electing this option are referred to as independently reporting charters (IRCs).

***Note:*** *Charter schools that are their own local educational agency (LEA) for special education purposes must report their data independently.*

* **Through authorizer:** The charter school's chartering authority reports CALPADS and CBEDS data to the CDE on behalf of the charter school.

***Note:*** *Charter schools that are authorized by the California State Board of Education (SBE) have their own district codes and are considered their own LEA; therefore, they must report their data as the authorizing agency and may not apply to report independently. In other words, they will report data on their behalf directly to the CDE.*

Additional information about reporting policies for charter schools is available at [CDE CALPADS/CBEDS Charter School Data Reporting Policy](https://www.cde.ca.gov/ds/sp/cl/charterschools.asp).

#### Instructional Type

Indicate the anticipated percentages of classroom-based and nonclassroom-based attendance to be offered by the charter school. The values input in the following two data fields should total 100 percent.

* Percentage of Classroom-Based Attendance
* Percentage of Nonclassroom-Based Attendance

#### Special Education

* Charter School Special Education Administrator (CSSEA) Information
	+ First Name
	+ Last Name
	+ Email
	+ Phone (format as 999-999-9999)
	+ Phone Extension (optional)
* Select the following as it pertains to the charter school:
	+ Deemed a local educational agency for the purposes of special education and participating in an approved special education local plan, pursuant to [*EC* Section 47641(a)](https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?sectionNum=47641&lawCode=EDC)
	+ Deemed a public school of the local educational agency that granted the charter, pursuant to [*EC* Section 47641(b)](https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?sectionNum=47641&lawCode=EDC)
* Special Education Local Plan Area (SELPA) affiliation (select from the drop-down menu)

#### Exclusive Partnership

* Does the charter school provide instruction exclusively in partnership, per [*EC* Section 47612.1](https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?sectionNum=47612.1.&lawCode=EDC)?
	+ If Yes, Program(s) the charter school is in partnership with (select all that apply)
		- Federal Workforce Innovation and Opportunity Act, pursuant to *United States Code*, Title 29 Section 3101 et seq.
		- Federally Affiliated Youth Build program
		- Federal Job Corps Training or Instruction, provided pursuant to a memorandum of understanding with the federal provider
		- California Conversation Corps or Local Conservation Corps, certified by the California Conservation Corps pursuant to *Public Resources Code* sections 14406 or 14507
* Does the charter school anticipate enrolling students above the age of 22 years?
	+ If Yes, Projected Enrollment of Students Above the Age of 22 Years for 2025–26

#### Early and Middle College High School

Is the charter school an Early College High School (ECHS) or a Middle College High School (MCHS) as outlined in *EC* sections [11302](https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?sectionNum=11302.&lawCode=EDC) and [11300](https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?sectionNum=11300.&lawCode=EDC)?

* **ECHS:** An innovative partnership between charter or non-charter public secondary schools and a local community college, the California State University, or the University of California that allows pupils to earn a high school diploma and up to two years of college credit in four years or less. ECHS are small, autonomous schools that blend high school and college into a coherent educational program.
* **MCHS:** A secondary school located on a community college campus offering challenging academic programs and designed to serve high-potential, high-risk students. A MCHS offers effective support services, small class sizes, and the opportunity for students to concurrently take some college classes at typically minor cost to the student.

Additional information regarding this subject is available under the Early and Middle College High Schools Section at [CDE Dual Enrollment Strategies](https://www.cde.ca.gov/ci/gs/hs/duenconstgs.asp).

### Section 5. Additional Information

#### Unique Entity Identifier

* Does the charter school have a Unique Entity Identifier (UEI)? (to check the UEI status of a charter school, visit [System for Award Management](https://sam.gov/))
	+ If Yes, UEI (format as 12 characters without any spaces or hyphens)

#### Retirement System

* Charter school's retirement system for teachers and classified staff (select all that apply)
	+ California State Teachers' Retirement System (CalSTRS)
	+ California Public Employees' Retirement System (CalPERS)
	+ 401(k) or 403(b)
	+ Federal Social Security
	+ Other (describe)
	+ None

### Section 6. Acknowledgment and Certification

#### Acknowledgment

I acknowledge that the California Department of Education (CDE) may provide a copy of the information that I have submitted to the charter school’s chartering authority for certification; make this information publicly available on its website; and/or provide this information to other agencies, organizations, and individuals.

#### Certification

I hereby certify that I am a full-time paid employee of the charter school who has direct knowledge of the information contained herein and am authorized to submit this information to the CDE. I certify that I have provided only true and correct information about the charter school.

By entering your name below and clicking the submit button, you are acknowledging that you have read and understand the above, and certifying that you are a full-time paid employee of the charter school and that the information provided in this form is true and correct.

**Authorized Representative Information**

* First Name
* Last Name
* Job Title
* Email
* Phone (format as 999-999-9999)
* Phone Extension (optional)

## Saving and Submitting

**Print a copy** of your completed COI for your records **before** submitting it. You will not be able to access your responses after you Submit.

**Note:** By selecting the **Print** button below, you will be redirected to a new browser window to print the form. You must return to the previous browser window to submit your COI to the Charter Schools Division.

Once you select the **Submit** button below, your responses will be sent to the Charter Schools Division and you will be redirected to the [CDE Charter School Certification of Information](https://www.cde.ca.gov/sp/ch/cscertinfo.asp). An automatically generated email will be sent to the Authorized Representative Email address provided above to confirm your submission. Please check your email account's spam folder if you do not receive a confirmation email to your inbox.

Address any questions or problems to charters@cde.ca.gov.