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Charter School Promising Practices: A Systematic Literature Review for the State Charter Schools Commission of Georgia (SCSC)

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High Level Summary

Introduction

Charter schools are designed to leverage organizational flexibility and freedom from traditional regulatory constraints to deliver innovative, high-quality education. However, many charter school operators receive little guidance on evidence-based best practices that can support innovation and high-quality education, leaving them to make consequential decisions about academics, finance, and governance without clear connections to the research base. Led by this problem, the State Charter Schools Commission of Georgia (SCSC) engaged WestEd to conduct a systematic review of the peer-reviewed literature on charter school best practices as a way to provide school operators with the support and guidance they need.

Context and Purpose. The Commission's core interest for developing the literature review answers a practical question: given real resource constraints, what does the evidence say about how charter schools can get the biggest return on their investments in financial decision-making, in academic programming and student support, and in governance? In particular the commission is interested in identifying and elevating best practices that have a strong empirical support that link particular strategies to desired outcomes for schools and students.

The review is intended primarily as a resource for SCSC to support individual Georgia charter school operators by producing a practical synthesis of what the evidence says works, what the evidence says to avoid, and where the evidence is lacking. It is organized around three domains the Commission identified as highest priority: academics, finance, and operations. Practices identified within the academic domain include those that are promising for providing meaningful student teaching and learning. Categories of finance include schools' expenditures, investments and management of school funds, while operations include practices involved with school governance and management. Throughout the literature review, the findings about practices in these domains are connected explicitly to the Georgia context, with particular attention to the structural realities of standalone, nonprofit-governed charter schools serving geographically and demographically diverse communities across the state.

Approach. WestEd conducted a systematic literature review of peer-reviewed research published between 2016 and 2026, drawing on five major research databases including EBSCO Host, ERIC, Google Scholar, SAGE Journals, and ResearchGate. An initial pool of 143 sources was identified using search terms focused on charter school best practices, innovation, governance, academics, finance, and operations. Sources were screened in two stages, first against title and abstract using a structured set of inclusion and exclusion criteria, then through full-text review by WestEd researchers assessing methodological credibility and relevance. Final inclusion decisions were made collaboratively by four WestEd researchers, with articles excluded only by

unanimous agreement. The final corpus includes 48 peer-reviewed sources spanning longitudinal quantitative studies, quasi-experimental designs, and qualitative case studies. A complete description of the methodology, including search terms, databases, and inclusion and exclusion criteria, is provided in Appendix A.

Findings. The most important headline from this review is one that the Commission and Georgia charter school operators should hold in mind throughout: the peer-reviewed literature on charter school best practices is considerably better at documenting patterns and structural conditions than at identifying specific, causally validated practices that reliably produce better outcomes. Many studies describe what distinguishes higher-performing or more financially stable schools from their peers, but few are designed to establish that any particular practice caused those outcomes.

With that framing in mind, three cross-cutting findings emerge consistently across the academics, finance, and operations literature:

- First, structural context matters enormously, and Georgia operators should be cautious about benchmarking against schools whose structural conditions differ from their own. Smaller, standalone charter schools face consistently different funding, governance, and operational challenges than CMO-affiliated schools, and best practices drawn from larger or more resourced environments may not transfer readily.
- Second, charter school autonomy is only as valuable as the intentionality with which it is used. Across all three domains, the schools that produce the strongest outcomes are not those that simply have more flexibility, but those that deploy that flexibility deliberately, in board recruitment, leadership development, instructional investment, family communication, and organizational culture.
- Third, the evidence base for Georgia's core question and high-priority interests remains thin. Research on standalone LEA-run charter schools and on financial decision-making authority within schools is limited or absent. This review explicitly identifies gaps in the literature so operators and the Commission can calibrate expectations accordingly.

The remainder of this review is organized into three sections: Academics, Finance, and Operations. Each section opens with a high-level summary of the literature and common themes seen in the literature. Following the high-level summary, the detailed literature review synthesizes common themes across articles and provides detailed article-level summaries.

Academics

This section synthesizes nineteen studies examining charter school academic practices and student outcomes across four sub-themes: school models and innovation, academic practices and student outcomes, student demographics, equity and access, and student supports for at-

risk populations. The literature was reviewed to surface lessons that individual Georgia charter school operators can apply to strengthen academic programming, broaden equitable access, and better serve vulnerable student populations. The literature on academics is broad and varied in methodology and focus. Much of it describes patterns and structures at the sector level rather than prescribing school-level strategies. However, across the four sub-themes, a consistent set of operator-relevant lessons emerges.

On school models, operators cannot change their core model or geographic context but understanding how those factors shape performance expectations and funding realities is itself a strategic asset. Mission clarity at founding is a meaningful predictor of long-term survival and enrollment growth (Maranto and Shakeel, 2022), and operators should proactively work with authorizers to establish evaluation metrics that reflect their school's stated mission rather than accepting standardized test scores as the sole measure of success (Huang and White, 2023). Suburban and rural operators in particular should be cautious about benchmarking against urban charter schools, where effectiveness patterns differ substantially (Gulosino and Liebert, 2020). For Georgia operators, the practical implication is clear: treat your model and locale not as fixed background conditions but as the starting point for a deliberate strategy around evaluation, communication, and peer benchmarking.

On student outcomes, the most consistent cross-cutting finding is that charter school benefits take time to materialize, students tend to underperform traditional public school peers in early years before outperforming them by years four and five academically (Clarke and Burt, 2018), with non-cognitive improvements most pronounced in schools five or more years into operation (Spees, 2019). Operators should anticipate and communicate this trajectory proactively to families and authorizers. Investments in teacher cultural responsiveness, rather than demographic matching or years of experience, represent the highest-leverage professional development intervention for improving teacher-student relationship quality in diverse urban charter schools (Phelps et al., 2026). The so what for school leaders is that patience and proactive communication are not passive virtues, they are active strategies that protect schools from premature accountability pressure while investments in instruction take root.

On equity and access, enrollment patterns are rarely neutral. How a school markets itself, staffs for special education, and communicates with families shapes who enrolls and who feels welcome (Barnard-Brak et al., 2018; Haber, 2021; Szabo, 2022). Operators should treat inclusive marketing, special education capacity, and responsive family communication, including bilingual staff, as core operational priorities rather than supplementary services. Schools that leverage these practices have the potential to expand their enrollment and better support populations that are historically underserved.

For operators serving at-risk populations, the organizational autonomy afforded by charter status is most valuable when channeled into intentional, relationship-centered structures: small school size, flexible attendance and credit recovery systems, trauma-informed practices, trade-

focused programming, and community partnerships that offset funding constraints (Lewis and Basford, 2020; Trauth and Harris, 2019; Fifolt et al., 2024). The transition to restorative discipline is achievable but depends on relational leadership rather than policy mandates, and operators should be prepared for racial disparities in exclusionary discipline to persist even as overall suspension rates decline (Bruhn, 2020). These findings collectively suggest that the question is not whether charter flexibility can support at-risk populations, but whether school leaders are harnessing that flexibility adequately.

Finance

The literature on charter school finance focuses on two central themes: funding equity and per-pupil allocation, and expenditures, resource allocation, and instructional spending. The literature tends to focus on documenting funding trends across settings rather than particular strategies for financial stability. Most studies describe structural inequities and allocation patterns from which a handful of promising practices and common pitfalls can be inferred.

For Georgia charter school operators, the most consequential takeaway from this body of research is that structural funding disadvantages are real but not uniformly distributed (Knight and Toenjes, 2020) and understanding where your school sits within those structures is the first step toward navigating them. Georgia charter schools predominantly operate as standalone LEAs rather than as affiliates of larger CMOs, a structural feature that places them in the most financially vulnerable category identified across multiple studies in this section (Diehl and Marx, 2019). Smaller, independent schools are disadvantaged in both public funding formulas and philanthropic giving networks (Knight and Toenjes, 2020; Corrales and Peters, 2017), and the gap in philanthropic access between independent charters and large CMOs has grown substantially over time (Diehl and Marx, 2019). Schools should seek out financial comparisons from institutions with similar size, governance structure, and demographic profiles (Knight and Toenjes, 2020).

Within those constraints, the literature points to several actionable practices. Schools that cultivated mission-aligned, well-networked board trustees and employed dedicated development staff were better positioned to access philanthropic resources (Castillo, 2020; Diehl and Marx, 2019). One southeastern charter school operating below district per-pupil funding levels sustained a high-quality instructional program through vendor-negotiated training, grant funding, and teacher-led professional development, a model with direct relevance for Georgia operators facing similar resource constraints (Kimbrel, 2019). At the same time, the research cautions against over-investing in administrative capacity: while some administrative infrastructure is necessary to support fundraising and operations, smaller schools that over-hire administrators face significant financial strain (Knight and Toenjes, 2020). It is also worth noting that financial mismanagement can threaten even academically strong schools, some higher-performing charter schools have closed for financial rather than academic

reasons, underscoring that sound resource management is a prerequisite for sustainability regardless of instructional track record (Ferrare et al., 2023). Finally, for-profit management is associated nationally with a greater diversion of resources away from direct instruction (Weber and Baker, 2018). Operators should be critically aware of their operating budgets, especially the investment in administrative capacity, and implications on instructional spending.

A notable gap across the literature is the near-total absence of research on how financial and budget decision-making authority is distributed between boards and school administrators within charter schools, a governance question with direct implications for financial accountability and sustainability.

Operations

The operations literature is the largest and most substantive section of the review, spanning governance, leadership, decision-making and organizational culture, teacher hiring and retention, and school closure and survival. Across all five areas, a consistent finding emerges: the degree to which charter schools build intentional organizational structures, rather than relying on the autonomy afforded by their charter contracts alone, is a meaningful predictor of both school quality and long-term survival.

On governance, board composition is among the strongest organizational levers available to operators. Donor representation on governing boards is positively associated with financial surpluses, enrollment growth, and academic achievement, while founder-dominated boards and larger boards are associated with weaker financial performance and lower academic achievement respectively (Gulosino and Şişli-Ciamarra, 2019). Operators should treat board recruitment as a governance and accountability mechanism, not just a fundraising strategy. At the same time, boards that operate without meaningful community accountability risk creating conditions harmful to students and eroding the family trust that sustains enrollment (Buras, 2021; Jeffers and Dixson, 2024). Having clearly defined boundaries between board and administrative authority is both a best governance practice and a leadership retention strategy.

On leadership, standalone charter principals bear significantly greater operational burdens than their CMO-affiliated counterparts, are broadly underprepared for the financial and facilities scope of their roles, and largely direct their own professional learning in isolation (Torres et al., 2019; Bridich, 2021; Gawlik, 2019). Operators should treat leadership preparation, mentorship, and succession planning as baseline institutional responsibilities. Board interference in administrative operations is among the primary drivers of principal departure (Torres, 2020), and effective leaders are consistently characterized by relational and visionary qualities, clear mission commitment, professional capacity-building, and authentic care for all student populations, rather than operational expertise alone (Davis and Boudreaux, 2019; Lancet et al., 2023).

On organizational culture and teacher retention, the literature offers a consistent cautionary lesson: organizational practices that feel like quality control mechanisms can quietly undermine teacher satisfaction and relational culture that retention depends on. Rigid discipline systems, overly prescriptive professional development, and centralized decision-making are consistently associated with teacher attrition and reduced school effectiveness (Stahl, 2020; McCluskey, 2024; Torres, 2023). Charter schools exhibit teacher turnover rates approximately double those of traditional public schools, and labor flexibility alone does not offset this disadvantage (Naslund and Ponomariov, 2019). Operators should periodically examine whether their discipline systems, professional development structures, and decision-making practices are creating the conditions in which teachers want to stay, not just the conditions in which underperformers can be removed.

On school survival, closure risk is not fixed at founding but is shaped by ongoing organizational decisions. Low enrollment and low academic quality are the strongest predictors of closure, with community satisfaction ratings emerging as a legitimate early warning indicator (Harris and Martinez-Pabon, 2022; Mars and Bronstein, 2020). Schools that invest in enrollment management, instructional quality, community trust, and leadership development are better positioned to move through the vulnerable early years, when approximately 28% of charter schools close, into the long-term stability the research suggests is achievable (Baude et al., 2020). Ultimately, the schools most likely to survive are those whose leaders treat enrollment, academic quality, and community trust as ongoing organizational priorities.

Detailed Literature Review

The sections that follow present a detailed literature review organized across the same three domains as the high-level summary: Academics, Finance, and Operations. Each domain is organized into two to four subcategories. Each subcategory opens with a thematic synthesis that draws out the most operator-relevant lessons across the studies in that section, followed by individual article summaries organized under the following sections: Summary and Thesis, Methodology, and Key Findings and Implications. Together, the thematic synthesis and article summaries are designed to be used in two ways: as a continuous narrative for readers who want a comprehensive picture of the evidence base, and as a reference tool for operators and Commission staff seeking targeted guidance on a specific topic.

Because many studies in this corpus speak to more than one domain, Appendix B provides a matrix mapping each article to its relevant domain(s) and as well as flagging studies set in the southeastern United States. Given the limited number of Georgia-specific or southeastern studies in the corpus, this geographic flag is intended to help readers quickly identify the evidence most proximate to Georgia's context.

Academics

School Models and Innovation

The seven articles in this section establish that charter schools are not a monolithic sector, and that meaningful variation in model type, geographic locale, and mission clarity has significant implications for how individual schools operate, sustain themselves, and should be evaluated. Roughly two-thirds of all charter schools nationally use a specialized model of some kind, and Georgia's specialization rate of 80.9% is among the highest in the nation (White and Huang, 2022), making the lessons from this section particularly salient for Georgia operators.

While operators are unlikely to change their core model, the research in this section surfaces several practical implications. First, mission clarity at founding is a meaningful predictor of long-term survival and enrollment growth, schools with a clearly defined founding mission were

significantly more likely to remain open and sustain enrollment than those without one (Maranto and Shakeel, 2022). Therefore, operators should treat mission definition and fidelity not as a compliance exercise but as a strategic asset. Because standardized test performance varies substantially across models and selection effects (the families choosing each model) which likely drive much of that variation, operators should proactively work with authorizers to establish evaluation metrics that reflect their school's stated mission rather than accepting test scores as the sole measure of success (Huang and White, 2023). This is especially relevant for models such as Waldorf schools, where students tend to perform below comparison groups in early grades before outperforming peers by eighth grade, a trajectory that requires proactive communication with authorizers and families to avoid premature accountability penalties (Telfer-Radzat, 2024). Third, geographic context matters: charter school effectiveness varies substantially by locale, with urban charter schools consistently outperforming traditional public school counterparts while suburban and rural schools do not show the same pattern (Gulosino and Liebert, 2020). Georgia operators, particularly those in suburban or rural settings, should be cautious about benchmarking their performance against urban charter schools and should seek locale-matched comparisons instead. Rural operators face additional structural disadvantages, including funding formulas that structurally underfund lower-enrollment schools (Marshall et al., 2022). While charter school operators cannot alter their school's model or geographic context, acknowledging these factors as structural determinants of performance rather than incidental background is itself a foundation for more strategic planning and benchmarking.

Gulosino, C., & Liebert, J. (2020). Examining variation within the charter school sector: Academic achievement in suburban, urban, and rural charter schools. *Peabody Journal of Education, 95*(3), 300–329.

Summary and Thesis: This article examines whether students in suburban charter schools perform better or worse academically than their counterparts in traditional public schools and urban charter schools, using California as the research setting due to its large and geographically diverse charter school population. The article argues that suburban charter schools are largely ineffective at improving student achievement relative to matched traditional public schools, and that charter school effectiveness varies substantially by geographic locale, with urban charter schools consistently outperforming their traditional public school counterparts while suburban and rural charter schools do not. **Methodology:** Quasi-experimental quantitative study using both propensity score matching (PSM) and virtual control record (VCR) matching methods applied to California Department of Education student-level longitudinal data for the 2009–2010, 2010–2011, and 2011–2012 school years, covering approximately 3 million students across approximately 10,000 schools, with standardized gain scores in math and English language arts as the primary outcome measures. **Key Findings and Implications:** Suburban charter school students made significantly smaller gains in math

achievement than their matched traditional public school counterparts, while ELA gains were no better or worse. Rural charter school students similarly made significantly smaller gains in math across all model specifications and performed no better than rural traditional public school students in ELA. Urban charter schools, which account for approximately 60% of all charter schools in the study, consistently drove achievement gains upward in both math and ELA relative to their traditional public school counterparts. The study attributes the difference in performance across geographic locales to product differentiation, a framework in which suburban charter schools respond to parental demand for specific curricular philosophies and values rather than for higher academic quality. The authors note that suburban charter schools serving higher-income areas offer programs such as Montessori, Waldorf, and project-based learning that attract families seeking cultural and educational alignment rather than academic improvement. The study identifies that the downward trend in achievement for suburban and rural charter schools is larger in magnitude than the upward trend in urban charter schools, contributing to overall negative math achievement growth across the California charter sector.

Huang, L., & White, J. (2023). Exploring Charter School Innovation: A Comparison of Popular Charter School Models. *Journal of School Choice, 17*(3), 387–403.

Summary and Thesis: This study examines whether standardized test performance varies across charter school models, arguing that because schools pursue fundamentally different missions, evaluating all charter schools using the same ELA and math metrics may systematically advantage or disadvantage certain models. The article argues that a more pluralistic evaluation framework is needed, as substantial variation in test performance across models is likely driven in part by selection effects rather than model effectiveness alone. **Methodology:** Quantitative descriptive study; the authors merged school model classification data from all 7,572 charter schools in the 2018–19 school year with ELA and math proficiency data from the NCES EDfacts database, using NAEP-weighted Z-scores to normalize performance comparisons across states with different testing systems. **Key Findings and Implications:** Substantial variation in standardized test performance was found across charter school models. Classical, STEM, and Montessori models are descriptively associated with the highest standardized test performance nationally. Art schools outperformed districts in ELA but less consistently in math. CTE and Language Immersion models performed below district and state averages in both subjects. The authors explicitly state that these findings are descriptive and do not establish that the model itself causes the performance difference. Selection effects, particularly differences in the families that choose each model, are acknowledged as a likely contributing factor. Subgroup analyses revealed that Montessori schools showed the highest relative performance for students with disabilities in ELA, while Classical schools showed the strongest gains for students with disabilities and economically disadvantaged students in both ELA and math. High Expectations schools showed gains for English learners and economically disadvantaged students in math but not for students with disabilities. The authors recommend

that authorizers work with schools to establish alternative or supplementary metrics aligned with each school's stated mission, including specialized assessments and classroom-based measures.

Kingsbury, I., Greene, J., & DeAngelis, C. (2023). The relationship between regulation and charter school innovation. *Educational Research and Evaluation*, 28(1-3), 25–41.

Summary and Thesis: This study tests the hypothesis that stringent charter school authorizing regulation is negatively associated with innovation, arguing that accountability focused narrowly on test scores pressure authorizers and school leaders toward familiar, homogenous school models. The article argues that more highly regulated charter environments produce meaningfully less innovation across most dimensions, particularly in pedagogy, setting, and school themes. **Methodology:** This is a quantitative study of 1,261 charter schools that opened between the 2015–16 and 2017–18 school years, drawn from the National Center for Education Statistics Elementary and Secondary Information System. Innovation is measured using a five-dimension typology, curriculum, pedagogy, targeted population, setting, and themes, scored via analysis of school websites and coded by two independent coders with 95% inter-rater agreement. Regulation is proxied by state-level scores from the National Association of Charter School Authorizers (NACSA), ranging from 0 to 33. **Key Findings and Implications:** There is a statistically significant and negative association between authorizing regulation and overall charter school innovation: a one-point increase in a state's NACSA score is associated with a 0.014 standard deviation decrease in innovation. Broken down by dimension, the negative relationship is statistically significant for themes, setting, and pedagogy. Notably, virtual and hybrid learning models are significantly less prevalent in more highly regulated states, as are experiential and Waldorf pedagogical approaches. The relationship between regulation and curriculum innovation runs in the opposite direction, with more highly regulated states showing higher prevalence of International Baccalaureate and language immersion programs. Georgia ranks among the most innovative states in the sample, with a standardized innovation score of 0.57 and a NACSA score range of 7–20 during the study period. The authors also note that 31% of charter schools in the sample exhibit none of the characteristics in the typology, indicating widespread conformity in the sector regardless of regulatory environment.

Maranto, R., & Shakeel, M. D. (2022). Does Charter School Mission Affect Survival and Growth? An Addendum to White and Huang's Census of Charter School Foci and Models. *Journal of School Choice, 16*(1), 43–48.

Summary and Thesis: This study examines whether having a clearly defined founding mission is associated with charter school survival and enrollment growth, using the first two cohorts of Arizona charter schools as a natural longitudinal experiment. The article argues that mission

clarity at founding is a meaningful predictor of long-term viability, with mission-driven schools significantly more likely to remain open and to sustain enrollment growth than those without a defined mission. **Methodology:** Quantitative study using chi-square tests and t-tests applied to a small sample (n = 54) of Arizona charter schools from their founding in 1995–96 through 2012, drawing on data from the Arizona Department of Education on enrollment and open/closed status. **Key Findings and Implications:** Charter schools with clearly defined founding missions were significantly more likely to remain open (83%) compared to those without a defined mission (46%). Schools without defined missions also showed near-zero enrollment growth (1.7%) compared to mission-driven schools. Charter schools serving at-risk students did not show a greater tendency to close, though they did grow more slowly, potentially reflecting intentional efforts to remain small. The authors conclude that charter authorizers should weigh mission clarity when evaluating charter applications.

Marshall, D. T., Neugebauer, N. M., Huang, L., & White, J. (2022). Describing rural charter schools in the United States. *Journal of School Choice, 16*(4), 562–587. https://doi.org/10.1080/15582159.2022.2110460

Summary and Thesis: This article describes the national landscape of rural charter schools in the United States using data from the 2018–2019 school year, examining student demographics, school characteristics, curricular and pedagogical innovation, and the relationship between state-level policy and rural charter school prevalence. The article argues that rural charter schools represent a distinct and underexamined sector of public education that differs meaningfully from urban charter schools in terms of innovation, student populations served, and the structural barriers they face, and that state policies, particularly the absence of caps on charter school numbers, are associated with greater rural charter school prevalence. **Methodology:** Quantitative descriptive study using data obtained from the National Alliance for Public Charter Schools (NAPCS) for all 727 rural brick-and-mortar charter schools operating in the United States during the 2018–2019 school year, with independent samples t-tests used to compare states with and without specific charter school policies. **Key Findings and Implications:** Rural charter schools served a majority White student population (57.3%), enrolled proportionally fewer students eligible for free or reduced-price lunch compared to non-rural charter schools (36.3% vs. 54.6%), and had an average enrollment of just over 354 students. More than three-fourths of rural charter schools were freestanding, not affiliated with a CMO or EMO. Nearly half were authorized by a local educational agency. In terms of innovation, rural charter schools specialized and innovated slightly less than the charter sector nationally. The most notable curricular difference was a disproportionate concentration of cultural and cultural/language immersion schools in rural areas, driven largely by charter schools serving Indigenous populations. In terms of pedagogical approach, high

expectations pedagogy was substantially underrepresented in rural charter schools, with only 3% of high expectations schools located in rural communities. Rural charter schools also had a disproportionate share of alternative schools serving populations such as foster youth, homeless students, and pregnant teens. The one statistically significant state policy finding was that states without caps on charter school numbers had a significantly larger proportion of their charter schools located in rural areas (16.80% vs. 9.02%), with a large effect size. The article also notes that financial mismanagement is identified as one of the chief reasons charter schools fail, and that authorizers that lack adequate funding will lack the capacity to perform financial oversight effectively. Additionally, the article notes that federal Title I funding formulas, based on the number rather than percentage of students living in poverty, structurally underfund rural schools with lower enrollments, and that charter schools on average receive approximately 27% less per-pupil revenue than traditional public school peers.

Telfer-Radzat, K. (2024). Exploring alternative education: a comparison on 3 levels—Waldorf charters, non-Waldorf charters, and local public schools, as measured by the California Assessment of Student Performance and Progress. *Frontiers in Education, 9*, 1323535.

Summary and Thesis: This study examines whether students enrolled in Waldorf-inspired charter schools in California demonstrate significantly different levels of academic achievement in ELA and math compared to students in non-Waldorf charter schools and traditional public schools. The article argues that Waldorf-inspired charter schools produce a distinctive developmental trajectory, with students performing below comparison groups in early grades but significantly outperforming both charter and traditional public school peers by eighth grade, suggesting that later academic gains may be attributable to Waldorf-specific pedagogical practices. **Methodology:** This is a quantitative, causal-comparative study using secondary analysis of five years of archival CAASPP standardized test data (2015–2019) from the California Department of Education, merged with Free and Reduced-Price Meal (FRPM) eligibility and enrollment data. The sample included 16 Waldorf-inspired charter schools (treatment group) compared against 1,500 non-Waldorf charter schools and 10,972 local public schools across California. **Key Findings and Implications:** Across all four regression models, a consistent pattern emerged: students in Waldorf-inspired charter schools performed significantly below comparison groups in ELA and math in grades three through six, with differences converging around grade six. By eighth grade, the pattern reversed, with Waldorf-inspired charter school students significantly outperforming both non-Waldorf charter schools and traditional public schools in both subjects. The study identifies several specific Waldorf pedagogical practices, including looping (keeping students with the same teacher across multiple grades), arts integration, story-based instruction, and delayed high-stakes testing, as potential drivers of later academic gains, though it does not isolate which practice is responsible. Socioeconomic status (FRPM eligibility) showed a consistent, small, negative association with performance across all models and school types.

White, J., & Huang, L. (2022). A Census of All Specialized Charter School Foci and Models. Journal of School Choice, 16(1), 11–42. https://doi.org/10.1080/15582159.2021.1995692

Summary and Thesis: This paper builds a national typological framework for classifying charter schools by their specialized foci, curricular, pedagogical, and student body, arguing that treating charter schools as an undifferentiated mass obscures meaningful differences in what schools do and who they serve. The article argues that roughly two-thirds of all charter schools use a specialized model of some kind, and that demographic composition varies substantially by model, raising important questions about equity and accountability frameworks that rely solely on standardized test performance. **Methodology:** Quantitative descriptive study with qualitative coding; the authors analyzed websites, marketing materials, and charter applications for all 7,534 U.S. charter schools and campuses operating in 2018–19, using a two-coder system to classify schools into foci and models. **Key Findings and Implications:** Roughly two-thirds of all charter schools use a specialized model of some kind. The most common models nationally are Personalized Learning, High Expectations, STEM, Classical, and Art. Demographic composition varies substantially by model, High Expectations and Single Sex schools serve the highest proportions of Black students, while Classical and Home School models serve predominantly White student populations. Georgia had a specialization rate of 80.9%, among the highest in the nation. The authors explicitly note that the study does not assess whether any model is effective, and that model fidelity could not be verified since classification relied on self-reported school materials. A discipline focus category was considered but could not be included due to insufficient data. Authors note that using ELA and math standardized tests as the primary accountability metric may disadvantage specialized schools whose goals extend beyond tested subjects.

Academic Practices and Student Outcomes

The four articles in this section examine how charter schools perform on both cognitive and non-cognitive student outcomes, and what school climate and instructional factors are associated with those results. The literature is most useful to operators not as a scorecard but as a guide for where to invest instructional and professional development resources, and how to manage stakeholder expectations across a school's developmental arc. The most consistent and actionable finding across this section is that charter school benefits take time to materialize. Students who transfer to charter schools tend to underperform traditional public school peers in the first three years before outperforming them in years four and five (Clarke and Burt, 2018), and non-cognitive improvements such as reduced absences and suspensions are most pronounced in schools five or more years into operation (Spees, 2019). For Georgia operators, particularly those in early years of operation, this pattern has two practical implications: first, schools should proactively communicate this trajectory to families and authorizers rather than allowing early-year results to generate unwarranted alarm; and second,

start-up cost pressures, which can consume up to a quarter of a charter school's budget in the first year, should be anticipated in financial planning (Spees, 2019).

On instructional organization, charter schools are not demonstrably more innovative than traditional public schools in their use of ability grouping, and placement in low-ability groups produces lower mathematics gains regardless of sector (Berends and Donaldson, 2016). Operators should critically examine their own ability grouping practices and resist defaulting to tracking structures that may suppress achievement for lower-placed students, particularly given that charter schools serve higher proportions of Black and Hispanic students who are disproportionately affected by low-group placement. Perhaps the most directly actionable finding in this section is that teacher cultural responsiveness, not teacher demographics or years of experience, is the primary predictor of teacher-student relationship quality in urban charter schools serving predominantly low-income Black students (Phelps et al., 2026). A 42% reduction in unexplained variability in teacher-student relationship quality was attributed to cultural responsiveness alone, suggesting that professional development oriented toward culturally responsive practice is a higher-leverage investment for improving school climate than hiring strategies focused on demographic matching. For Georgia operators serving diverse urban populations, this finding points toward a concrete and scalable intervention.

Berends, M., & Donaldson, K. (2016). Does the Organization of Instruction Differ in Charter Schools? Ability Grouping and Students' Mathematics Gains. *Teachers College Record*, 118, 110307.

Summary and Thesis: This study examines whether the distribution and organization of students into ability groups differs between charter and traditional public schools, and whether those grouping arrangements are differentially related to mathematics achievement gains across sectors. The article argues that while charter schools distribute students more evenly across ability groups than traditional public schools, they are not demonstrably more innovative in their use of ability grouping, as the relationship between group placement and mathematics gains does not differ meaningfully between sectors. **Methodology:** This is a quantitative study using regression analyses on a matched sample of 2,955 students taught by 188 mathematics teachers across 47 schools (25 charter, 22 traditional public) in six states (Colorado, Delaware, Indiana, Michigan, Minnesota, and Ohio) during the 2008–2009 school year. Schools were matched on geographic proximity (within 20 miles), racial/ethnic composition, socioeconomic status, and school size, with student mathematics achievement gains measured using vertically equated NWEA assessment scores. **Key Findings and Implications:** Charter schools showed a more even distribution of students across ability groups compared to traditional public schools, where students were more heavily concentrated in the average group and underrepresented in the high group. Across both sectors, students in low-ability groups made significantly lower mathematics gains than peers in high, mixed, or average groups. The relationship between ability group placement and mathematics achievement gains did not differ significantly between sectors, leading the authors to conclude that charter schools are not demonstrably

more innovative than traditional public schools in their use of ability grouping. The higher rate of temporary teacher certification in charter schools (21% vs. 9% in traditional public schools) did not negatively affect student achievement gains in this study.

Clarke, F. C., & Burt, W. L. (2018). A Study of the Effects of Charter Schools on Student Achievement, Attendance, and Selected Mitigating Factors in a Midwestern State's Midsize Urban School Districts. *Education and Urban Society, 51*(9), 1266–1285.

Summary and Thesis: This study examines whether students who transfer from traditional public schools to urban charter schools in a Midwestern state outperform their traditional school counterparts in mathematics, reading, and attendance over a five-year period, while also investigating the role of ethnicity, gender, and poverty as mitigating factors. The article argues that charter school benefits are not immediate, with transfer students underperforming in the first three years, but that by years four and five, charter school students outperform traditional public school (TPS) peers in both academic achievement and attendance. **Methodology:** Quasi-experimental quantitative study using longitudinal student-level data from 31 Midwestern urban school districts and 88 contiguous charter schools across the 2008–2012 school years to compare achievement and attendance outcomes across student cohorts by years since transfer, grade level, and demographic subgroups. **Key Findings and Implications:** Students who transferred to charter schools underperformed their TPS counterparts in both mathematics and reading during the first three years following transfer and had lower attendance rates during that same period. In years four and five following transfer, however, charter school students outperformed TPS students in both subjects and demonstrated higher attendance rates. Student ethnicity and socioeconomic background were found to be significant mitigating factors in student outcomes, while gender showed less consistent influence. Charter schools in this Midwestern state enrolled higher proportions of Black and Hispanic students relative to traditional public schools.

Phelps, C., Francois, S., Rice, K. G., Baker, C. N., & Overstreet, S. (2026). Cultural responsiveness and teacher-student relationships in urban charter public schools. *Education and Urban Society*, 1–17.

Summary and Thesis: This study examines the relationship between teacher cultural responsiveness and teacher-student relationship quality in urban charter schools serving predominantly low-income Black student populations, and whether the racial/ethnic composition of school staff and teachers' years of experience moderate that relationship. The article argues that students' perceptions of teacher cultural responsiveness are a significant predictor of teacher-student relationship quality, and that neither the racial/ethnic makeup of school staff nor teachers' years of experience moderate this relationship, suggesting that culturally responsive practices, rather than teacher demographic characteristics, are the primary driver of positive teacher-student relationships in these settings. **Methodology:** Quantitative multilevel modeling study drawing on baseline data from the 2016–2017 school

year collected as part of the Safe Schools NOLA longitudinal project, with a sample of 174 classroom teachers and 1,365 students in grades 3 through 8 across six urban public charter schools in a southern city; cultural responsiveness and teacher-student relationships were measured using the Respect for Diversity and Teacher-Student Relations subscales of the Delaware School Climate Survey, with cross-level interaction analyses used to test moderating effects of racial/ethnic share and aggregated teaching experience at the school level. **Key Findings and Implications:** The primary finding was that students' perceptions of teacher cultural responsiveness significantly predicted the quality of teacher-student relationships; the inclusion of cultural responsiveness scores accounted for a 42% reduction in unexplained variability in teacher-student relationship scores. Contrary to the study's hypotheses, the racial/ethnic composition of school staff did not moderate the relationship between cultural responsiveness and teacher-student relationships, nor did it directly predict teacher-student relationship quality. Similarly, teachers' years of experience neither moderated nor directly predicted teacher-student relationship quality. The authors note that the school-level measure of cultural responsiveness used, which reflects students' perceptions of all teachers rather than individual classroom teachers, may account for the absence of moderating effects, as students may be evaluating the overall school climate rather than specific teacher characteristics. It suggests that professional development and school culture investments oriented toward culturally responsive practice may be more actionable levers for improving school climate than hiring decisions based on racial/ethnic matching alone.

Spees, L. P. (2019). Evaluating Non-Cognitive Skills among Students Switching Into and Out of Charter Schools in North Carolina. *Journal of School Choice*, *13*(2), 135–157. https://doi.org/10.1080/15582159.2018.1560856

Summary and Thesis: This study examines whether attending a charter school in North Carolina improves students' non-cognitive outcomes, specifically attendance, tardiness, suspensions, and disciplinary infractions, and whether the age of the charter school moderates these effects. The article argues that charter schools generally produce small positive improvements in non-cognitive outcomes compared to traditional public schools, but that these benefits take time to materialize, with the most consistent positive results appearing in schools five or more years into operation. **Methodology:** Quantitative study using student fixed-effects models applied to longitudinal North Carolina student-level data, tracking students who switched between charter schools and traditional public schools; the fixed-effects design controls for time-invariant individual student characteristics by comparing each student to themselves before and after switching. **Key Findings and Implications:** Charter schools in North Carolina generally produced small positive improvements in students' non-cognitive outcomes compared to traditional public schools, including reductions in absences, in-school suspensions, and out-of-school suspensions. Charter schools in their first year of operation had a negative effect on non-cognitive outcomes, but effects improved over time, with the most consistent positive results appearing in schools in their fifth year of operation or beyond. Students in fifth-year charter

schools showed the largest improvements in suspension outcomes and legally reportable offenses. The study attributes early negative outcomes in part to the additional financial burdens of start-up costs, including facility expenses that can consume up to a quarter of a charter school's budget in early years.

Student Demographics, Equity, and Access

Charter school enrollment patterns, organizational identities, and family engagement practices can often intersect with race, socioeconomic status, and disability status in significant and problematic ways when equity and inclusion are not explicitly sought out. The literature surfaces several concrete, operator-level practices that can meaningfully shape who a school serves and how well it serves them. On enrollment of students with disabilities, charter schools nationally under-enroll this population relative to traditional public schools, driven in part by selective marketing, burdensome application procedures, and limited special education staffing (Barnard-Brak et al., 2018). Georgia's discrepancy is relatively small compared to most states, but operators should review their own enrollment and application practices to ensure they are not inadvertently discouraging families of students with disabilities from enrolling. On stratification, the language and imagery schools use to market themselves carries real demographic consequences. Charter schools emphasizing inquiry-based learning on their websites enroll significantly fewer students of color and fewer low-income students, independent of academic quality, with CMO-level branding decisions accounting for roughly a third of that variation (Haber, 2021). Operators should critically examine whether their communications signal inclusivity or inadvertently narrow their prospective families. Traditional charter schools are also the most racially segregated of all public school types, a pattern that persists in the absence of state accountability mechanisms tied to integration (Shelton, 2025). Perhaps the most immediately actionable finding in this section is that Latinx families choose charter schools primarily to mitigate risk, and that bilingual staff, translation services, and responsive handling of parental concerns are the concrete practices that distinguish higher-trust charter environments (Szabo, 2022). Operators serving diverse communities should treat family communication infrastructure not as a supplementary service but as a core enrollment and retention strategy. Taken together, these studies underscore that enrollment patterns are rarely neutral, they are shaped by deliberate or inadvertent operator choices about marketing, staffing, and communication, and Georgia operators who are intentional about these practices are better positioned to build the diverse and inclusive school communities.

Barnard-Brak, L., Schmidt, M., & Almekdash, M. H. (2018). Enrollment of students with disabilities in charter schools: Contemporary national and state level findings. *Education Policy Analysis Archives, 26*(43).

Summary and Thesis: This article examines national and state-level enrollment patterns of students with disabilities in charter schools compared to non-charter public schools using

population-level Civil Rights Data Collection data. The study contends that charter schools significantly under-enroll students with disabilities under IDEA relative to non-charter public schools, and that the magnitude of this discrepancy varies substantially by state, with state-level legislative and regulatory frameworks playing a meaningful role in shaping these patterns. **Methodology:** Quantitative study using two-level hierarchical linear modeling (HLM) applied to U.S. Department of Education Civil Rights Data Collection (CRDC) data for the 2011–2012 and 2013–2014 academic years, covering approximately 95,500 schools and 50 million students nationally, with the percentage of students receiving special education services under IDEA as the outcome variable. **Key Findings and Implications:** Nationally, charter schools enrolled an average of approximately 9.8% of students under IDEA compared to 12.2% in non-charter schools for 2011–2012, and 9.9% versus 12.4% for 2013–2014, representing a small but practically significant difference (d ≈ -0.33 to -0.34). In more than half of states, charter schools showed a practically significant under-enrollment of students with disabilities. Enrollment discrepancies did not change significantly between the two data collection periods, suggesting the gap is persistent over time. The study identifies operational factors contributing to under-enrollment, including selective marketing, burdensome application procedures, limited special education personnel, and practices of steering students with disabilities away from enrollment. Differences across states are partly attributed to varied special education funding allocation mechanisms, and IDEA's "placement neutral" funding requirement is noted as removing financial incentives for charter schools to maintain inclusive learning environments. For-profit charter schools are specifically identified as enrolling fewer students with disabilities than non-profit charter schools. Georgia is directly referenced in the state-level rankings. Georgia ranked 29th out of 40 states in 2011–2012 (d = -0.17) and 34th in 2013–2014 (d = -0.08), indicating a relatively small enrollment discrepancy compared to most other states.

Haber, J.R. (2021). Sorting Schools: A Computational Analysis of Charter School Identities and Stratification. *Sociology of Education*, 94(1), 43–64.

Summary and Thesis: This study explores whether charter schools' organizational identities — specifically their emphasis on inquiry-based learning — correspond to race- and class-specific educational values of prospective families, functioning as a mechanism by which schools and families self-sort along racial and socioeconomic lines. The article argues that ideological differentiation among charter schools reinforces rather than alleviates racial and socioeconomic stratification, independent of academic quality. **Methodology:** This is a quantitative study using computational text analysis (web crawling and word-embedding models) of the websites of all 6,872 U.S. charter schools operating in 2015–16, combined with mixed-effects linear regression models linking IBL emphasis to school- and district-level poverty rates, student racial composition, and academic proficiency scores drawn from the National Center for Education Statistics and the American Community Survey. **Key Findings and Implications:** Charter schools serving higher proportions of White and affluent students are significantly more likely to emphasize IBL on their websites, and schools emphasizing IBL enroll

significantly fewer students of color and fewer low-income students, independent of academic quality measures. The relationship between IBL and school demographics holds even after controlling for standardized test proficiency in reading/language arts and mathematics, indicating that educational ideology, not academic quality alone, predicts enrollment patterns. Charter management organization (CMO) membership accounts for approximately 34% of the variation in IBL emphasis, suggesting that CMO-level branding decisions significantly shape the identities schools project. The author concludes that ideological differentiation among charter schools reinforces rather than alleviates racial and socioeconomic stratification.

Shelton, A. (2025). Segregated by Choice: The Relationship Between Charter School Type and School Racial Segregation in Two Cities. *Journal of School Choice*, 19(4), 686–702.

Summary and Thesis: This study introduces a charter school typology, traditional, innovation, and diverse-by-design, to examine how charter school type relates to racial segregation across public schools in Kansas City and St. Louis, Missouri. The article argues that traditional charter schools are the most racially segregated of all public school types, while diverse-by-design charters, though individually diverse, are concentrated in majority White neighborhoods and contribute to racial unevenness across the broader school system. **Methodology:** This is a quantitative study using racial demographic data from the Missouri Department of Elementary and Secondary Education (2022–23) for all public schools in Kansas City (n=74) and St. Louis (n=99), supplemented by school-aged population data from the American Community Survey (2018–2022). The author applies multiple segregation measures, including intense segregation thresholds, Theil's entropy index, a dissimilarity index, a segregation contribution index, and a diversity contribution index, alongside a principal components and cluster analysis of neighborhood types. **Key Findings and Implications:** Traditional charters are the most likely of all public school types to be intensely segregated, with 95.2% of traditional charters in Kansas City and 100% in St. Louis enrolling student populations that are 90% or more Nonwhite. Diverse-by-design charters have the highest diversity scores and all contribute positively to system diversity; however, in Kansas City, diverse charters enroll 10.3% of public school students but 39.7% of the White public school population, making them a significant contributor to racial unevenness across the system. Diverse charters are concentrated almost exclusively in majority White neighborhoods, while traditional and innovation charters are most often located in Black or high-poverty neighborhoods. The author notes that these patterns persist in the absence of any state accountability mechanism tied to segregation outcomes, and that Missouri currently ranks 32nd out of 50 states and D.C. in having a policy context that supports integration.

Szabo, J. (2022). "I just didn't want to risk it": How perceptions of risk motivate charter school choice among Latinx parents. *American Educational Research Journal, 59*(4), 651–686.

Summary and Thesis: This study examines what motivates Latinx parents in Houston, Texas to exit district schools in favor of charter schools. The article argues that charter school enrollment

among Latinx families is primarily driven by risk mitigation, rooted in children's negative experiences with school safety and academics, compounded by parents feeling dismissed or ignored when raising concerns, and that responsive communication practices, including bilingual staff and validated parental concerns, are concrete distinguishing features of higher-trust charter environments. **Methodology:** This is a qualitative case study drawing on in-depth, semi-structured interviews with 31 families (34 individuals) who enrolled a sixth-grade child at Houston College Prep Charter School (HCP Charter) for the 2019–2020 school year. The sample was 90% Latinx, evenly split between foreign-born and U.S.-born parents, and represented families from two feeder districts. **Key Findings and Implications:** Perceptions of both present and future risk, rooted in children's negative experiences with safety and academics, failed parental intervention, and parents' own schooling histories, drive charter school selection as a strategy to protect children's educational futures. Perceptions of present risk emerged from children's direct negative experiences with school safety (fighting, bullying, drug exposure) and academic quality (low expectations, academic tracking, lack of challenge), compounded when parents attempted to raise concerns with school officials and were dismissed, disrespected, or ignored, often across language and class lines. Parents framed charter school enrollment as risk mitigation, and the study found this risk awareness persisted even after enrollment, with families continuing to monitor the charter school experience. Family and parent experience within a school is a meaningful driver of charter school enrollment. The study documents that risk perceptions intensify as children approach middle and high school, with elementary school experiences viewed as lower stakes. The study identifies parental responsiveness and communication, including bilingual staff, translation services, and validated parental concerns, as concrete, actionable practices that distinguish higher-trust charter school environments from district schools.

Student Supports: At-Risk Students, Trauma-Informed Practices and Restorative Justice

The four articles in this section are all qualitative case studies documenting how individual charter schools have used their organizational flexibility to design and implement student support models for at-risk and vulnerable populations. Taken together, they present a consistent picture: charter schools that prioritize meeting students' social-emotional and physical needs through trauma-informed practices, restorative justice principles, and flexible program structures can achieve meaningful outcomes for students who have not succeeded in traditional school environments. Specific structural features associated with successful outcomes for at-risk students include small school size, flexible attendance and credit recovery systems, trade-focused and sensory-based programming, and community partnerships that help offset per-pupil funding constraints (Lewis and Basford, 2020; Trauth and Harris, 2019). Operators serving high-risk populations should treat these not as peripheral enrichment features but as core programmatic infrastructure. Wraparound wellness services, including affiliated primary care and counseling, represent an additional replicable model for schools

with the partnerships and flexibility to pursue them (Fifolt et al., 2024). On school discipline, the transition from punitive to restorative practices is achievable but depends more on relational leadership than on policy mandates or positional authority (Bruhn, 2020). Leaders who model restraint, persistence, and respect — rather than issuing top-down directives — are more likely to build the staff and student buy-in that restorative justice requires. Operators considering this transition should also be aware that racial disparities in exclusionary discipline can persist even as overall suspension rates decline, and that explicitly naming and addressing race in daily practice is a necessary and ongoing part of that work (Bruhn, 2020). Taken together, these studies suggest that for Georgia operators serving at-risk populations, the organizational autonomy afforded by charter status is most valuable when it is channeled into intentional, relationship-centered structures rather than left as untapped flexibility.

Bruhn, S. (2020). "The child is not broken": Leadership and restorative justice at an urban charter high school. *Teachers College Record, 122*, 080301.

Summary and Thesis: This study examines how two school leaders at an urban charter high school exercise leadership, build legitimacy, and develop relationships with teachers and students as they work to transform the school from a traditional discipline model to a restorative justice culture. The article argues that successful implementation of restorative justice in a charter school context depends less on positional authority than on relational leadership, specifically the qualities of restraint, persistence, and respect, though the transition also surfaces persistent tensions around teacher attrition, student independence, and naming race explicitly in daily practice. **Methodology:** This is a qualitative case study using portraiture, a methodology that emphasizes participants' phenomenological perspectives. The researcher conducted three in-depth interviews with each of two school leaders, shadowed them approximately weekly for a semester, formally interviewed three teachers and four students, and conducted observations across classrooms, hallways, and school common spaces at a K–12 charter school serving over 1,100 students across two Northeastern cities. **Key Findings and Implications:** Easton Academy reduced its overall out-of-school suspension rate from 5.7% in 2012–2013 to 2.7% in 2016–2017, and narrowed racial gaps in exclusionary punishment, though disparities for Black students (3.7%), Latino students (3.3%), and students with disabilities (4.7%) remained. The study identified three leadership qualities, restraint, persistence, and respect, as central to the school's successful transition to restorative justice. These qualities were embodied not through positional authority but through relational leadership. The study also surfaces tensions in the transition, including teacher attrition, the challenge of balancing student support with the development of student independence, and the ongoing difficulty of explicitly naming race and racism in daily practice.

Fifolt, M., Gurley, D. K., & White, D. (2024). Demonstrating resilience in the face of adversity: an embedded phenomenological case study of the Magic City Acceptance Academy. *Journal of LGBT Youth, 21*(4), 699–715.

Summary and Thesis: This study examines the impact of a politically motivated anti-LGBTQ+ campaign targeting the Magic City Acceptance Academy, one of the first LGBTQ+-affirming charter schools in the United States, and explores how the school community responded to and was affected by the campaign. The article argues that the school's use of trauma-informed curriculum, restorative justice principles, and wraparound wellness services represents a replicable model for using charter school flexibility to support the social-emotional development and resilience of vulnerable student populations. **Methodology:** This is a qualitative, embedded phenomenological case study drawing on three data sources: a systematic review of media coverage, key informant interviews with individual's integral to MCAA's design and operations, and a student focus group. **Key Findings and Implications:** The article documents MCAA's use of trauma-informed curriculum and restorative justice principles as intentional programmatic choices to support social-emotional development and student discipline, directly referenced as a distinguishing feature of the school's academic model. The article references wrap-around services (specifically, an affiliated wellness center providing primary care and counseling) as part of MCAA's student support structure, which may be relevant to discussions of how charter schools use flexibility to address unique student needs, particularly for vulnerable populations.

Lewis, J., & Basford, L. (2020). One student at a time: How an innovative charter school succeeds with dropout recovery. *National Youth-At-Risk Journal, 4*(1).

Summary and Thesis: This study examines how a small charter high school in a large upper-Midwest city successfully serves high-risk students who have not succeeded in the traditional school system. The article argues that charter schools that implement trauma-informed practices can improve outcomes across multiple domains, and that specific structural features, including small school size, a family-like atmosphere, flexible attendance and credit systems, and trade-based programming, are potentially a more effective alternative to traditional and no-excuses charter models for high-risk student populations. **Methodology:** This is a qualitative interpretive case study of one charter high school, drawing on individual interviews with 11 of 15 staff members (including the school director), two student focus groups with 10 student participants, and more than 20 school observations of both classroom and school-wide activities. **Key Findings and Implications:** The school graduates approximately 85% of its senior students annually, the majority of whom were previously at high risk of dropping out. Five key qualities were identified as contributing to the school's success: a casual, family-like atmosphere supported by restorative rather than punitive discipline practices; a deliberate commitment to small school size, capped at 115 students with class sizes of 5–12; creative responses to absenteeism including a competency-based capstone system in place of credits, shorter six-week sessions instead of semesters, and use of technology for students who miss

class; extreme patience and flexibility in the classroom rooted in individualized instruction and trauma-informed relationship building; and innovative trade-focused programs, most notably a Youth Build construction program — that offer stipends, link participation to attendance requirements, and provide pathways to post-secondary employment. Key challenges identified include the tension between flexibility and academic rigor, pressure to scale up while maintaining the small-school model due to financial limitations of per-pupil funding, racial representation of teaching staff relative to the student population, and dependence on the founding director's leadership for institutional continuity.

Trauth, J. N., & Harris, K. (2019). Lighthouse Community School: An In-Depth Look at Successful Strategies Used with At-Risk Students. *Multicultural Education, 27*(1).

Summary and Thesis: This article describes the Lighthouse Community School, a small charter school in Cincinnati, Ohio, that uses a Trauma-Informed Care model combined with urban agriculture and sensory-based programming to support at-risk youth and reduce dropout rates. The article argues that meeting students' physical and emotional needs before academic demands, through sensory-based, community-integrated programming, can create the conditions for at-risk students to remain enrolled and progress toward graduation. **Methodology:** This is a qualitative case study of a single charter school (enrollment approximately 60 students) drawing on program descriptions, school documentation, and practitioner observations; no comparison group or quantitative outcome data are reported. **Key Findings and Implications:** The school's TIC model prioritizes meeting students' physical and emotional needs before academic expectations are made. Sensory-based programming, including urban agriculture, cooking, yoga, and art therapy, serves as both therapeutic intervention and cross-curricular academic instruction. The school uses an incentive system to motivate student participation. Community partnerships and volunteer networks support the garden program financially and operationally, with funding sourced from school budgets, nonprofit grants, and corporate donations. The article reports that most students graduate, though specific graduation rate data are not provided. The school has a hybrid governance structure, operating as its own district under a nonprofit in partnership with Cincinnati Public Schools.

Finance

Funding Equity and Per-Pupil Allocation

The four articles in this section collectively illuminate the structural inequities embedded in charter school funding and offer a few promising practices for attaining additional funding. Per-pupil funding comparisons between charter and traditional public schools are often misleading without accounting for enrollment size, student demographics, and regional cost variation (Knight and Toenjes, 2020; Corrales and Peters, 2017). A consistent pattern emerges across these studies: smaller charter schools are structurally disadvantaged in both public funding formulas and philanthropic giving networks, with Diehl and Marx (2019) documenting that large CMOs became nearly three times more likely than independent charter schools to receive philanthropic grants over time, and Castillo (2020) finding that even mission-driven schools serving less affluent communities face substantially constrained fundraising capacity. Therefore, individual charter schools should be cognizant of variation in funding models and look to schools with similar demographics even for financial best practices. Several charter schools found financial success from cultivating affluent board trustees who contributed to school fundraising and had deep personal networks to leverage (Castillo, 2020) and leveraging administrative staff to improve school fundraising efforts (Diehl and Marx, 2019). Yet employing too many administrators can also cause significant financial burden, especially for smaller charter schools which tend to be underfunded when considering the administrative capacity required to operate these stand-alone schools (Knight and Toenjes, 2020). Charter schools must strike a delicate balance of employing enough administrators to effectively fundraise and operate the schools while being mindful of the limited resources, especially for small and stand-alone charter schools. For Georgia, where many charter schools are standalone Local Education Agency (LEA) run rather than CMO-affiliated, these findings suggest that the funding gap may be most acute precisely for many Georgia charter schools.

Castillo, E. (2020). "Doing what it takes to keep the school open": The philanthropic networks of progressive charter schools. Education Policy Analysis Archives, 28(121). https://doi.org/10.14507/epaa.28.4452

Summary and Thesis: This article examines how three progressive charter schools in New York City mobilized financial support, the extent to which their financial supporters operated in a networked context, and the degree to which resource mobilization activities aligned with the schools' founding progressive missions. The article argues that progressive charter schools incorporated market logic when cultivating financial support networks, securing their own

resource advantages while reinforcing resource inequities and undermining the equity and community responsibility dimensions of their progressive missions. **Methodology:** Qualitative comparative case study design using semi-structured interviews (n=44) conducted over 13 months (May 2017–June 2018) with charter school leaders, board members, and key financial supporters; supplemented by approximately 50 hours of observations of board trustee meetings and advocacy organization events, and document analysis including IRS 990 forms, charter application and renewal documents, internal financial documents, and fundraising materials. **Key Findings and Implications:** The three progressive charter schools built largely local, school-specific financial support networks. All three schools employed market-based resource mobilization strategies, including cultivating affluent board trustees with "give-or-get" potential, leveraging personal networks of teachers and school leaders, and drawing on high-status parent communities for fundraising. Schools demonstrated mixed views on accepting funding from major foundations, with some leaders rejecting such funding due to mission misalignment. The study found no convergent grant-making network operating across progressive charter schools. All three schools exhibited "mission drift," departing from equity commitments in order to secure organizational survival in the competitive charter market. Hudson Charter School was a partial exception, maintaining board seats for staff, parents, and community stakeholders, employing a dedicated development director, and engaging in collective advocacy for funding reforms benefiting multiple conversion charter schools. Schools identified cultivating affluent board trustees as a successful financial practice for charter school fundraising.

Corrales, A., & Peters, M. L. (2017). Examining the Relationship between School Funding and Academic Achievement for Charter Schools. The Charter Schools Research Journal, 12(1), 55–79.

Summary and Thesis: This study examines whether a relationship exists between school funding levels and academic achievement for charter schools in Texas, using standardized test performance as the primary measure of outcomes. The article argues that funding is positively correlated with passing rates and closing performance gaps, though not with academic growth, and that charter school autonomy to invest in educational programs, combined with the benefits of smaller school size, may positively influence achievement and equity outcomes. **Methodology:** This is a quantitative correlational study using a purposeful sample of 118 Texas charter schools that were operational across three consecutive academic years (2012–13, 2013–14, and 2014–15). **Key Findings and Implications:** Funding is positively correlated with STAAR passing rates and closing performance gaps, but not with academic growth. The study further discusses school size as a contextual factor, noting that smaller school districts tend to produce better academic outcomes and may have greater ability to communicate expectations, operate with fewer bureaucratic barriers, and invest resources more directly into educational programs. The study also notes that the level of autonomy charter schools have to invest and

innovate on educational programs may positively influence general academic achievement and closing performance gap levels.

Diehl, D., & Marx, R. A. (2019). Following the leader: The evolving network of charter school giving. Teachers College Record, 121, 100305.

Summary and Thesis: This article examines the network dynamics of philanthropic giving to charter schools and charter-related organizations in California between 2003 and 2014, investigating whether the convergence in giving strategies previously documented among major foundations has spread to the broader universe of smaller foundations. The article argues that giving across the full network of foundations became increasingly centralized and institutionalized over time, with smaller and newer foundations increasingly mimicking the targeted funding strategies of larger, higher-status foundations, resulting in a concentration of philanthropic resources among a shrinking number of charter-related recipients. **Methodology:** Quantitative network analysis study using exponential random graph models (ERGMs) applied to grant data from 809 foundations drawn from the Foundation Directory Online, covering 5,252 individual grants totaling approximately $1.12 billion made to California charter schools and charter-related organizations across three time periods: 2003–2006, 2007–2010, and 2011–2014. **Key Findings and Implications:** Giving became increasingly centralized over the study period, with a small number of recipients receiving a disproportionately large share of funding ties across all three time periods. Large charter management organizations (CMOs) were consistently more likely to receive grants than independent charter schools, and this disparity grew substantially over time, large CMOs were 1.27 times more likely than independent charters to receive a grant in the first period, rising to 2.87 times more likely by the third period. Foundations with professional staffs were more active than those without in all periods, though this gap narrowed over time as smaller foundations increasingly co-funded alongside professionalized foundations, consistent with mimicry behavior. Geographic proximity (propinquity) consistently predicted co-funding and co-receiving ties across all periods, indicating that local and regional funding relationships remained important even as national convergence patterns emerged. The authors note that centralization may create funding inequity, making it more difficult for smaller, ideologically independent, or geographically isolated charter schools to access philanthropic resources.

Knight, D. S., & Toenjes, L. A. (2020). Do charter schools receive their fair share of funding? School finance equity for charter and traditional public schools. *Education Policy Analysis Archives, 28*(51). https://doi.org/10.14507/epaa.28.4438

Summary and Thesis: This article examines whether charter schools in Texas receive an equitable share of public funding compared to traditional public school (TPS) districts. The article argues that raw funding comparisons between charter and TPS districts are misleading

without controlling for structural and demographic cost differences, and that after such adjustments, larger charter school districts are significantly overfunded while smaller charter school districts are significantly underfunded. **Methodology:** Quantitative study using a district-level panel dataset drawn from the Texas Education Agency's Public Education Information Management System (PEIMS), merged with U.S. Census Bureau and National Center for Education Statistics data, covering 171 charter school districts and 1,019 TPS districts for the 2017–18 school year. **Key Findings and Implications:** After controlling for enrollment size, student demographics, urbanicity, and local wage costs, larger charter school districts, those serving more than 1,600 students, receive significantly more state and local funding per student, while smaller charter districts, are significantly underfunded. The Texas school finance mechanism assigns all charter schools the same Adjusted Allotment equal to the unweighted average across all TPS districts ($6,518 in 2017–18), which is inflated by small, rural TPS districts that receive large sparsity adjustments; the weighted average Adjusted Allotment for TPS students was $5,697. The article also documents that charter schools employ fewer teachers and other staff per student but more administrators, offer lower teacher salaries, employ teachers with substantially less experience, and have teacher turnover rates approximately double those of TPS districts. This study provides a rigorous methodological framework, applying the concepts of horizontal and vertical equity, for evaluating whether charter school funding is equitable relative to comparable public schools.

Expenditures, Resource Allocation, and Instructional Spending

The four articles in this section examine how charter schools allocate financial resources across staffing, instruction, and professional development, and what those allocation patterns mean for school quality. Weber and Baker (2018) establish that management type, for-profit versus nonprofit, produces meaningful differences in instructional expenditures nationally, with for-profit managers diverting a greater share of resources away from direct instruction. Barrett et al. (2022) add a related finding: that greater operational autonomy strengthens the relationship between teacher performance and retention but does not correlate with higher teacher salaries within a school, raising questions about whether deregulated spending flexibility translates to better instructional outcomes. Ferrare et al. (2023) add an important cautionary note, finding that some academically higher-performing charter schools closed for financial rather than academic reasons, underscoring that sound resource management is a prerequisite for sustaining instructional quality regardless of a school's academic track record. Kimbrel (2019), the only study in this section set in the southeastern United States, documents how a single charter school operating below district per-pupil funding levels used vendor-negotiated training, grant funding, and teacher-led professional development sessions to deliver a research-aligned program under significant resource constraints, offering replicable low-cost strategies relevant to Georgia operators facing similar conditions. A notable gap in this section

is the absence of research examining how resource allocation decisions are made at the board versus administrative level within charter schools.

Barrett, N., Carlson, D., Harris, D. N., & Lincove, J. A. (2022). When the Walls Come Down: Evidence on Charter Schools' Ability to Keep Their Best Teachers Without Unions and Certification Rules. *Educational Evaluation and Policy Analysis*, 44(2), 283–312.

Summary and Thesis: This article examines whether charter schools operating in a fully deregulated, market-based teacher labor market are more likely to retain high-performing teachers and exit low-performing teachers compared to traditionally governed neighboring districts. The article argues that while deregulated charter markets produce a stronger relationship between teacher performance and retention, this advantage is offset by the lower average quality of replacement teachers, resulting in no net improvement in overall teacher quality over time. **Methodology:** This is a quantitative study using a difference-in-differences model applied to seven years (2009–2015) of Louisiana Department of Education administrative personnel and student records, covering approximately 2,600 unique teachers across 187 schools. Teacher performance is operationalized using a two-step value-added model measuring teacher contributions to student test score growth in grades 4–8 across reading, math, science, and social studies. **Key Findings and Implications:** The relationship between teacher performance and exit was significantly stronger in the deregulated New Orleans market than in neighboring traditional districts. High-performing teachers in the market setting were correspondingly less likely to exit. However, this tighter performance-retention relationship did not translate into a net improvement in overall teacher quality over time, because replacement teachers entering New Orleans schools were of lower average value-added than those entering neighboring traditional districts. Regarding compensation, performance-based salary differences were only observed when teachers transferred between schools, there was no evidence that salaries of teachers who remained at the same charter school varied according to their value-added. The study also found that the tighter performance-retention relationship was most pronounced in schools operated by the Recovery School District and charter management organizations, which had the greatest operational autonomy, while schools operated by the Orleans Parish School Board, which most closely resembled traditional district governance, showed no significant difference from traditional districts. Findings suggest that greater operational autonomy produces a stronger relationship between teacher performance and retention.

Ferrare, J. J., Waddington, R. J., Fitzpatrick, B. R., & Berends, M. (2023). Insufficient accountability? Heterogeneous effects of charter schools across authorizing agencies. *American Educational Research Journal, 60*(4), 696–734.

Summary and Thesis: This article examines how charter schools authorized by different bodies in Indiana produce varying effects on student achievement, and investigates the extent to which those differences are driven by the types of operators and instructional modalities that authorizers approve. The article argues that substantial variation in student achievement outcomes is driven not only by operator type but by the authorizing agency itself, indicating that authorization practices independently shape student outcomes. **Methodology:** This is a quantitative longitudinal study using 10 years (2008–2018) of student-level administrative data from the Indiana Department of Education for students in Grades 3–8, employing a quasi-experimental matching design that compared students who switched from traditional public schools to charter schools with matched peers who remained in traditional public schools across 11,284 charter students in 88 charter schools matched to 46,060 students in 1,343 traditional public schools. **Key Findings and Implications:** Substantial variation in student achievement outcomes were found across Indiana's different charter school authorizing agencies. Notably, when the same operator types were analyzed without controlling for authorizer, Charter Management Organizations (CMOs) statewide showed small positive effects and virtual Education Management Organizations (EMOs) showed large negative effects, however, CMO performance was not consistent across authorizers, indicating that authorization itself, beyond operator type alone, shapes student outcomes. Additionally, some academically higher-performing charter schools closed for financial rather than academic reasons, while some persistently low-performing schools remained open due to the dynamics of parental demand and authorizer incentive structures tied to enrollment-based fees.

Kimbrel, L. A. (2019). High quality professional development in charter schools: Barriers and impact. Journal of Organizational and Educational Leadership.

Summary and Thesis: This qualitative case study examines how one suburban K-8 charter school in the southeastern United States overcame systemic barriers to implement a research-aligned professional development program and the effects of that program on teacher practice and student outcomes. The article argues that despite financial constraints, time limitations, and teacher resistance unique to the charter school environment, school leaders who hold a shared commitment to high-quality professional development can implement a program aligned with research-based best practices that positively impacts teacher behavior, job satisfaction, and student engagement. **Methodology:** Descriptive qualitative single case study conducted at one K-8 suburban charter school in its second year of operation, drawing on semi-structured interviews with seven teachers and three administrators, document analysis of professional development plans and surveys, and review of student assessment data from the Northwest Evaluation Association Measure of Academic Progress (MAP) administered at the end of the school's first year of operation. **Key Findings and Implications:** The school implemented a two-stream professional development model consisting of mandatory all-staff training aligned to charter-required instructional methodologies and a personalized, teacher-

driven weekly session in which teachers chose from multiple workshops based on self-identified needs. Teachers and administrators consistently reported that professional development content was aligned with the school's mission and charter contract. Financial constraints were the most frequently cited barrier, manifesting as insufficient funding for substitute teachers, inability to send staff to outside conferences, and the general resource limitations of a new school operating at a lower per-pupil funding level than traditional public schools. Time constraints were exacerbated by the charter's requirement of a longer school day, which reduced available professional development hours and increased the risk of teacher burnout. Barriers were partially addressed through vendor negotiations for training hours tied to supply purchases, a weekly early student release schedule, grant funding, and administrative modeling and relationship-building. Professional development was reported to have positively impacted teacher implementation of required pedagogical skills and content delivery, as well as teacher job satisfaction.

Weber, M., & Baker, B. (2018). Do For-Profit Managers Spend Less on Schools and Instruction? A National Analysis of Charter School Staffing Expenditures. *Educational Policy, 32*(6), 855–902.

Summary and Thesis: This study examines whether charter school management type, for-profit versus nonprofit, leads to meaningful differences in school-site staffing and instructional expenditures per pupil, compared with each other and with traditional district-operated schools. The article argues that for-profit charter managers spend less than both nonprofit charters and district schools on instructional staffing, with the gap between total and instructional spending suggesting a greater diversion of resources away from direct instruction, though state-level variation is notable, with Georgia being an exception where for-profit charters spend more than district schools. **Methodology:** Quantitative study using a national school-site expenditure dataset (fiscal year 2011–2012) drawn from the Civil Rights Data Collection (CRDC), NCES Common Core of Data, and EDFacts; state-level analyses were conducted for Arizona and Michigan using state financial reporting data. **Key Findings and Implications:** Nationally, charter schools, both for-profit and nonprofit, spend less per pupil on instructional salaries than district schools. For-profit charters spend less than nonprofit charters on both total and instructional staffing, with the gap between total and instructional spending being proportionally larger for for-profits, suggesting a greater diversion of resources away from direct instruction. Both charter types serve fewer students with disabilities and fewer English language learners than district schools in the same labor markets, with for-profits showing a more pronounced difference. State-level patterns vary considerably, with Georgia being one of the few states where for-profit charters spend more than district schools on total and instructional salaries.

Operations

Governance, Boards and Accountability

The four articles in this section examine how charter school governing structures and accountability frameworks shape school-level outcomes. While some findings in this section have implications for authorizers and policymakers, the literature surfaces several concrete lessons for operators about how to structure and manage their boards to support both financial health and mission integrity. The most directly actionable finding is that board composition matters in measurable ways. Donor representation on governing boards is positively associated with financial surpluses, enrollment growth, and academic achievement, while founder-dominated boards, though associated with stronger academic outcomes, tend toward weaker financial performance and greater reliance on debt financing (Gulosino and Şişli-Ciamarra, 2019). Importantly, the financial benefit of donor representation was attributed to monitoring incentives rather than financial expertise alone, meaning that boards with financial experts but no donor ties showed no significant improvement. Georgia operators should therefore think carefully about board recruitment not just as a fundraising strategy but as a governance and accountability mechanism. Larger boards were associated with lower academic achievement, suggesting that board size should be managed deliberately (Gulosino and Şişli-Ciamarra, 2019).

The literature also documents what happens when governance structures lack adequate accountability and community grounding. Charter autonomy without sufficient board oversight can create conditions harmful to students, particularly when performance metric pressure incentivizes schools to prioritize appearances over school quality (Buras, 2021). Boards that operate without meaningful community accountability mechanisms risk alienating the families they serve and undermining the trust that sustains enrollment (Jeffers and Dixson, 2024). For Georgia operators, the practical implication is that effective governance requires clearly defined boundaries between board and administrative authority, active donor and community engagement on the board, and a culture of oversight that treats emphasize student and community accountability.

Buras, K. (2021). "We have to get certain numbers to stay open": Has a charter school network in New Orleans failed to draw the line? *Journal of Law & Education, 50*(1), 1–65.

Summary and Thesis: This article examines a cycle of mismanagement and deceptive practices of a charter school network in the 2010's which included transcript manipulation, inadequate course offerings, and manipulation of academic records. The article argues that charter school autonomy without adequate oversight creates conditions harmful to students, particularly poor

and working-class youth of color, as pressure from performance metrics incentivizes the manipulation of academic records. **Methodology:** This is a qualitative case study conducted during 2017–2018, drawing on interviews with students, parents, and former teachers, supplemented by document review. **Key Findings and Implications:** The article concludes that charter school autonomy without adequate oversight creates conditions harmful to students, particularly poor and working-class youth of color as accountability regimes incentivize schools to look better on paper at any cost. In particular Louisiana's School Performance Score system, which equally weights standardized test scores, attendance, graduation rates, and diploma quality for high schools, is identified as creating institutional pressure on charter operators to manipulate data. State monitoring by the Louisiana Department of Education was characterized as reactive, conducted through announced visits only, and criticized for weighting critical and non-critical violations equally.

Glazer, J. L., Massell, D., & Malone, M. (2019). Charter schools in turnaround: Competing institutional logics in the Tennessee Achievement School District. *Educational Evaluation and Policy Analysis, 41*(1), 5–33.

Summary and Thesis: This qualitative study examines how six charter organizations operating within Tennessee's Achievement School District (ASD), a state-run turnaround district, interpreted and adapted to a governance environment defined by competing demands from state accountability systems, market forces, and local community values. The article argues that while charter organizations can support school turnaround, success in such environments requires well-resourced organizations capable of simultaneously meeting stringent academic performance demands, competing for students, and responding to community priorities rooted in a fundamentally different set of values than those driving state and market logics. **Methodology:** Qualitative longitudinal study drawing on 181 interviews with 93 participants conducted between 2013 and 2017, supplemented by structured observations and document analysis, with a sample of six charter networks and independent operators, and three additional operators that participated for a single year, with representation from all operators in the ASD during the time period examined. **Key Findings and Implications:** Operators entered the ASD with models premised on teacher and school-level autonomy over curriculum and instruction, but substantially revise those models in response to the ASD's performance demands. All but one provider shifted away from teacher-developed curriculum toward more centrally specified instructional systems, shared lesson plans, common assessments, and structured professional development, a shift operators described as necessary to reduce cognitive load and allow teachers to focus on instructional delivery rather than design. Operators were also unprepared for the scope of special education needs and student mobility in zoned neighborhood schools. Because ASD operators could not control enrollment timing, impose conditions on families, or readily suspend or expel students, traditional charter strategies for establishing school culture and buy-in were significantly curtailed. In response to community resistance, operators invested substantially in community outreach, hired community liaisons, developed parent

advisory structures, expanded extracurricular programming, and in some cases redefined their organizational missions to reflect neighborhood values. These community investments were described by operators as vital despite the significant resource strain they created.

Gulosino, C. A., & Şişli-Ciamarra, E. (2019). Donors and founders on charter school boards and their impact on financial and academic outcomes. *Education Finance and Policy*. https://doi.org/10.1162/edfp_a_00255

Summary and Thesis: This article examines the relationship between the composition of charter school governing boards and both financial and academic outcomes, focusing specifically on the presence of donor-directors, financial experts, and founder-directors. The article argues that donor representation on charter school boards is positively associated with financial performance and academic achievement due to donors' monitoring incentives, while founder representation is negatively associated with financial performance but positively associated with academic achievement. **Methodology:** Quantitative study using a hand-collected panel dataset of 89 Massachusetts charter schools operating between 2001 and 2013, comprising 780 school-year observations. **Key Findings and Implications:** Donor representation on charter school boards was positively and significantly associated with higher financial surpluses, greater budget goal attainment, lower debt-to-asset ratios, more efficient cash management, higher total funds, and a yearly enrollment growth rate averaging 19.4 percent. Donor presence was also positively associated with higher student achievement across all six academic performance measures, including a 28.37 percentage point increase in math proficiency. The positive financial effect was attributed to monitoring incentives rather than financial expertise alone as boards with financial experts but no donor ties showed no significant improvement in financial surplus or budget attainment. Founder-directors were associated with a 17.1 percentage point decrease in financial surplus, greater reliance on debt financing, lower private grant attainment, and lower enrollment growth; however, founders were positively and significantly associated with higher academic achievement across all measures. The article notes that charter school revocation decisions are most often due to financial mismanagement and governance problems, and that schools with donor representation on their boards accounted for only 37% of the eight closures recorded in the dataset despite representing 66% of the sample. The study also found that larger boards were associated with lower academic achievement.

Jeffers, E.K., & Dixson, A.D. (2024). The Plantation "All Charter" Model and the Long Durée of Resistance for Black Public High Schools in New Orleans. Educational Evaluation and Policy Analysis, 46(4), 673–708.

Summary and Thesis: This article examines how the post-Katrina New Orleans all-charter school model affected two historically Black public high schools through the theoretical lens of the plantation complex, centering the long history of Black community resistance to the dismantling of Black public education. The article argues that the all-charter model functioned

as a plantation management device that worked to control and disperse Black collective power, community identity, and educational self-determination. **Methodology:** Two comparative case studies drawn from a two-year ethnographic study (Jeffers, 2018) of historically Black high school closures in New Orleans, using a sociocultural-historical approach. Data collected from 2015 to 2017 included open-ended interviews, field notes from participant observations at public meetings and community events, and document analysis. **Key Findings and Implications:** The article documents a decline in Black student enrollment from 99% prior to state takeover to 76% following. The predominantly White charter management organization (CMO) teachers who replaced Black educators employed strict discipline practices that participants described as controlling student communication, movement, and collaboration. Charter governing boards operating as autonomous contractors exercised complete control over human resources, curriculum, discipline, and facility access, with the elected school board retaining virtually no authority over school-level decisions. Data also revealed that charter schools constructed structural barriers to meaningful parental participation, including restricting parent organizing and limiting community access to school facilities.

Leadership and Principal Development

The seven articles in this section examine how charter school principals are prepared, socialized, supported, and retained. Across the literature, two structural realities emerge that are particularly relevant to Georgia operators. First, standalone charter principals bear significantly greater operational burdens than their CMO-affiliated counterparts, are broadly underprepared for the financial and facilities scope of their roles, and largely direct their own professional learning in isolation (Torres et al., 2019; Bridich, 2021; Gawlik, 2019). Second, formal succession planning is largely absent across the sector, creating meaningful vulnerability at leadership transitions (Gawlik, 2019). Since most Georgia charter schools operate as standalone LEAs, these findings point to a concrete organizational gap: operators should treat leadership preparation, mentorship, and succession planning as baseline institutional responsibilities rather than assumed competencies. On retention, the literature is equally consistent: mission alignment and positive relationships are the primary reasons leaders stay, while board interference in administrative operations is among the primary drivers of departure (Torres, 2020). Clearly defined boundaries between board and administrative authority are therefore both a governance best practice and a retention strategy, two goals Georgia operators can address simultaneously through board policy and role clarity.

On leadership practice, effective charter principals are consistently characterized by relational and visionary qualities, clear vision-setting, building professional capacity, protecting instructional time, and authentic commitment to all student populations, rather than technical expertise alone (Davis and Boudreaux, 2019; Truong, 2019; Lancet et al., 2023). For Georgia operators, the practical takeaway is that operational competence is an often-underdeveloped

skill, yet the principals most likely to drive strong outcomes are those who pair it with genuine relationship-building and a clear mission.

Bridich, S.M. (2021). Approved to fail: A case study of leadership at three new high schools. *Journal of Educational Administration, 59*(6), 794–810.

Summary and Thesis: This paper examines how leaders of one charter school and two innovation schools in an urban Colorado district navigated the transition from approved school plans to operational reality during their schools' first three years. The article argues that leaders of new charter and innovation schools face systemic barriers, chronic burnout, and financial shortfalls that undermine their ability to implement founding missions, often leading to early departures. **Methodology:** This is a qualitative, multisite case study using a Participatory Action Research (PAR) approach, drawing on 76 monthly semi-structured interviews conducted over three years with school leaders at three new public high schools (one charter, two innovation) in a single urban Colorado school district. **Key Findings and Implications:** The study finds that leaders faced both significant personal burnout and systemic, district-level barriers that impeded their ability to implement their schools' founding missions and visions. Work-life imbalance and professional isolation compounded this burnout, contributing to leadership departures at two of the three schools within the study period. At all three schools, the gap between budgeted and actual costs required leaders to reallocate funds away from mission-critical programming despite a commitment to these programs. The authors conclude that part of what made these roles so challenging was a mismatch between their preparation and the expectations of leaders in their particular schools. Leading a non-traditional school required leaders to simultaneously function as building-level and district-level administrators, handling HR, facilities, real estate, zoning, construction, and budget management, operational responsibilities for which leaders were underprepared.

Davis, F., & Boudreaux, M. K. (2019). Teacher leaders' perceptions of charter school principals' instructional leadership practices. *Journal of Educational Research and Practice, 9*(1), 89–103.

Summary and Thesis: This article examines the instructional leadership practices of charter school principals as perceived by teacher leaders at two urban charter high schools in the Mid-South region. The article argues that effective charter school principals demonstrate five key instructional leadership practices. **Methodology:** This is a qualitative phenomenological case study using focus group interviews with eight teacher leaders from two urban charter high schools. **Key Findings and Implications:** This article identifies five perceived instructional leadership best practices for charter school principals as reported by teacher leaders: communicating a clear vision, using diverse communication with stakeholders, building professional capacity, using varied data for decision-making, and protecting instructional time. Principals promoted professional capacity by identifying teacher strengths and growth areas through observations and evaluations.

Gawlik, M. A. (2019). Principalship socialization in charter schools. *Journal of School Leadership, 29*(1), 3–24.

Summary and Thesis: This exploratory case study examines how three charter elementary schools in Florida manage the socialization of individuals as they transition into principalship roles. The article argues that while charter schools vary in their socialization approaches, formal succession planning is largely absent, creating vulnerability in leadership continuity. **Methodology:** This is a qualitative, exploratory case study drawing on semi structured interviews with three current and two former charter school principals, field observations, and school improvement plan documents from three Florida elementary charter schools. **Key Findings and Implications:** The three schools varied in their approaches to principalship socialization, though the most prominent tactics across all three were collective, informal, and serial socialization. All three schools used collective socialization, meaning new principals were exposed to peer influences and cohort-based experiences rather than transitioning into isolation. Serial socialization, in which experienced principals groomed potential successors, was evident at two of the schools. Fixed socialization, meaning a defined timeline for principalship succession, was largely absent across all three schools, and none of the school improvement plans examined included succession planning as a formal component. Charter school board presidents at all three schools declined to participate in the study, limiting the data to principal perspectives only.

Lancet, S., McKittrick, L., & Rhim, L. M. (2023). Leadership as an Implementation Driver: Identifying Best Practices to Support Organizational Change. *Journal of Disability Policy Studies, 34*(2), 115–126.

Summary and Thesis: This article examines how charter school leadership at both the school and charter management organization (CMO) levels influences the quality of education and outcomes for students with disabilities at high-performing schools. The article's central argument is that charter school leaders who demonstrated authentic commitment to students with disabilities, rather than surface-level compliance with legal requirements, produced meaningfully better school environments and outcomes. **Methodology:** Qualitative study of a subsample of 20 charter high schools drawn from a larger national study of 47 charter schools across 15 states; data were collected through in-person school visits, semi-structured interviews with school leaders, special education staff, and students with disabilities, as well as family focus groups and classroom observations. **Key Findings and Implications:** Charter school leaders who demonstrated authentic commitment to students with disabilities, rather than surface-level compliance with legal requirements, produced meaningfully better school environments and outcomes. Three leadership themes were consistently present in schools that effectively served students with disabilities: maintaining a clear vision and sense of purpose, creating a safe environment that welcomes diverse perspectives, and ensuring all voices are heard in decision-making. Schools where leadership lacked clarity of vision left special education staff feeling isolated and unsupported, with programming that was piecemeal

rather than schoolwide. A key takeaway is the impact of charter school leadership's vision on school culture and structure, which drives student outcomes.

Torres, A. C., Bulkley, K., & McCotter, S. (2019). Learning to lead in externally managed and standalone charter schools: how principals perceive their preparation and support. *International Journal of Leadership in Education, 22*(3), 261–278.

Summary and Thesis: This article examines how charter school principals in standalone and CMO-affiliated schools perceived their pre-service and in-service leadership preparation and support, and how organizational context shaped those experiences. The article argues that the organizational context of a charter school significantly shapes how principals perceive their preparation and support, with standalone principals bearing greater operational burdens and feeling more isolated than their CMO-affiliated counterparts. **Methodology:** This is a qualitative, exploratory study drawing on in-depth interview data from 15 charter school principals across New York and New Jersey. **Key Findings and Implications:** CMO-affiliated principals reported participating in formally designed pre-service and in-service learning experiences, had narrower job responsibilities, and devoted more time to instructional leadership. By contrast, standalone charter principals largely directed their own learning, bore full operational responsibility, and felt isolated and stressed in their roles. For both types of principals, the quality and availability of mentorship was identified as the factor that most significantly shaped perceived quality of learning. Standalone charter boards were described by most participants as generally supportive of school improvement efforts; boards more commonly supported principals by reorganizing leadership roles than by providing formally designed learning opportunities.

Torres, A. C. (2020). Push, pull, tap and switch: Understanding the career decisions of charter school leaders. *Leadership and Policy in Schools, 19*(2), 171–189.

Summary and Thesis: This exploratory study examines how charter school principals in standalone and CMO-affiliated schools in New York and New Jersey made decisions to enter, stay in, switch, and leave leadership roles. The article argues that charter school leaders are primarily motivated to enter and remain in leadership by mission alignment and positive relationships, while sustained interpersonal conflict and board interference are the primary drivers of departure**. Methodology:** This is a qualitative, exploratory study drawing on in-depth semi-structured interviews with 14 charter school principals and executive directors in New York and New Jersey. **Key Findings and Implications:** Leaders had two common reasons for entering charter school leadership: attraction to the autonomy and mission of the school, and a sense of obligation driven by the absence of other qualified candidates. Among those who intended to stay, positive relationships with students, families, and staff were cited as the most important contributing factor, along with an overall sense of efficacy in their work. Among those who left or intended to leave, the most significant factor was the emotional and physical toll of sustained interpersonal conflict with teachers, parents, students, or board members,

compounded by long working hours. Conflict with the board of trustees was specifically identified by two participants as a potential reason for leaving, with one participant describing board interference as crossing into areas outside the board's appropriate role. Most participants described their future career options as being primarily within the charter sector.

Truong, F. R. (2019). The good principal: A case study of early-career charter principals' role conceptualizations. *Management in Education, 33*(4), 157–165.

Summary and Thesis: This qualitative case study examines how early-career charter school principals within one CMO conceptualize what it means to be a "good principal." The article argues that principals primarily define effective leadership through soft skills and personality traits rather than technical or operational knowledge, revealing a notable misalignment between principal self-conception and formal job descriptions. **Methodology:** This is a qualitative case study using semi-structured interviews with 15 current and former charter school principals (10 active, 5 exited) within a single CMO network in one urban city, supplemented by surveys and organizational documents; the sample is limited to one CMO and may not be representative of charter schools broadly. **Key Findings and Implications:** Participants described effective charter principals through four categories: leader behaviors (e.g., organization, data use, continuous learning), leader knowledge (e.g., instructional best practices), purpose (e.g., mission-driven vision setting), and personal traits (e.g., reliability, being a "people person"). Soft skills and personality traits dominated participants' descriptions over technical or operational knowledge. A notable misalignment was identified between what principals believed the role required and what was documented in formal job descriptions, for example, principals emphasized personal vision-setting while job descriptions emphasized implementing the organization's existing vision.

Decision-Making and Organizational Culture

The four articles in this section examine how organizational structures, cultural norms, and decision-making practices shape daily school operations and staff behavior in charter schools. A notable limitation is that the studies concentrate heavily in CMO and no-excuses environments, leaving the decision-making and organizational culture dynamics of standalone LEA-run charter schools largely unexamined. Nonetheless, the literature surfaces clear lessons about both promising and cautionary practices.

The most directly actionable finding is that principal-led budget decision-making with meaningful teacher input, supported by a central office structure that absorbs administrative and fiscal tasks, is associated with strong instructional leadership and student-centered resource allocation (Gawlik, 2018). For standalone Georgia operators without access to a central support office, this finding points toward a deliberate organizational design question: what structures or partnerships can absorb operational burden so that principals can focus on instruction rather than administration? The cautionary findings in this section are equally

instructive. Corporate management practices, rigid no-excuses discipline systems, and highly centralized authority tend to position teachers primarily as compliance enforcers, displacing the relational and culturally responsive practices that research more consistently associates with positive student outcomes (Stahl, 2020; Lopez Kershen et al., 2018). When board and donor pressure to prioritize quantitative metrics goes unchecked, staff efforts to pursue more equitable and holistic practices become constrained and tend to operate in silos without meaningful school-wide impact (Rohn, 2024). Georgia operators should be alert to the organizational conditions that produce these dynamics, not only in no-excuses CMO environments but in any school where accountability pressure crowds out the relational work that drives culture. The practical implication is that discipline systems, staff evaluation practices, and board-level performance expectations should be periodically examined not just for compliance but for whether they are creating the conditions in which teachers can build genuine relationships with students.

Gawlik, M. A. (2018). Leadership Knowledge and Practices in the Context of Charter Schools. *Leadership and Policy in Schools*, *17*(4), 422–453. https://doi.org/10.1080/15700763.2017.1326145

Summary and Thesis: This article examines how charter school principals enact leadership practices across eight dimensions of a conceptual leadership framework, with a focus on instructional leadership, organizational culture, resource management, and community engagement. The article argues that charter school principals demonstrate strong instructional leadership, but their effectiveness is significantly enabled by structural supports, particularly a central administrative office that absorbs non-instructional operational responsibilities. **Methodology:** Qualitative case study of four elementary conversion charter school principals in the same Florida district, using interviews, observations, and leadership team meeting data; findings are exploratory and not generalizable beyond the study's specific context. **Key Findings and Implications:** All four principals demonstrated strong instructional leadership, prioritizing data-driven decision making, continuous improvement, and high expectations for both students and staff. Budget decision-making was principal-led but consistently involved teacher input, with spending prioritized toward instructional materials, professional development, and student-centered goals. The presence of a central charter district office that handled administrative and fiscal tasks was identified as a key factor enabling principals to focus on instructional leadership rather than managerial duties.

Lopez Kershen, J., Weiner, J. M., & Torres, C. (2018). Control as care: How teachers in "no excuses" charter schools position their students and themselves. *Equity & Excellence in Education, 51*(3–4), 265–283.

Summary and Thesis: This qualitative study examines how 20 early career charter school teachers in "no excuses" schools describe their interactions with and understandings of students. The article argues that no excuses discipline systems lead teachers to position

students simultaneously as natural deviants requiring control and as passive performers requiring protection, resulting in a form of care expressed primarily through compliance and enforcement rather than through the interpersonal, culturally responsive relationships that existing research identifies as more effective. **Methodology:** Qualitative study utilizing positioning theory as an analytic framework, drawing on one-time semi-structured interviews of approximately one hour each conducted in Fall 2014 with 20 early career charter school teachers (fewer than seven years of experience) from the Northeast United States. **Key Findings and Implications:** Teachers positioned students in two primary and overlapping ways: as active deviants naturally predisposed to misbehavior, and as passive performers incapable of making sound decisions without the structure of a behavior system. As a result, teachers described their own role predominantly as enforcers of the no excuses system, with control and compliance serving as the central mechanisms of classroom management. Some teachers felt unable to deviate from the no excuses system even when individual student circumstances warranted alternative responses. The study illustrates how a school's organizational discipline model shapes teacher identity, role perception, and the nature of teacher-student relationships, positioning teachers as compliance enforcers rather than as caring adults or academic instructors.

Rohn, K. C. (2024). From awareness to action: Institutional agents attempt to (re)imagine college readiness and success at a no-excuses charter high school. *Teachers College Record, 126*(3), 3–29. https://doi.org/10.1177/01614681241252299

Summary and Thesis: This article examines how institutional agents, teachers, counselors, and administrators, at a no-excuses charter high school perceive the college-for-all ethos that has shaped their school and attempt to transform the one-size-fits-all, assimilationist college readiness practices associated with the no-excuses model. The study argues that while institutional agents are beginning to resist no-excuses practices, the complexity of changing an organizational norm creates significant tensions and tradeoffs. **Methodology:** Qualitative case study of a single no-excuses charter high school (City Prep Charter High School, pseudonym) located in a city on the East Coast, drawing on semi-structured interviews with 14 institutional agents, four days of in-person school observations, and a thorough document review of public records, annual reports, handbooks, school profiles, and reported academic outcomes. **Key Findings and Implications:** Institutional agents described significant pressure to prioritize test scores, GPA, and college acceptance rates above holistic student development to sustain donor funding and meet board expectations. Over half of participants attributed negative consequences of their college-for-all practices to the school's historic roots in white institutional culture and one-size-fits-all assimilationist expectations. Although the school had begun shifting away from some no-excuses practices, traces of the no-excuse culture remain, including a merits and demerits behavior management system and strict dress code policies. Some institutional agents introduced individualized counseling, family partnership models, trauma-informed professional development, affinity groups, and restorative justice practices.

However, these efforts were largely occurring in silos, without coordinated institutional support, and were constrained by school-wide policies that remained misaligned with expressed equity goals.

Stahl, G. D. (2020). "We make our own rules here": Democratic communities, corporate logics, and "no excuses" practices in a charter school management organization. *Journal of Contemporary Ethnography, 49*(2), 176–200. https://doi.org/10.1177/0891241619871091

Summary and Thesis: This article examines the daily institutional culture and leadership practices of one school within a Charter School Management Organization (CMO), exploring how corporate ideologies are enacted in schooling for low-socioeconomic status students of color. The article argues that CMO practices rooted in corporate logics and "no excuses" pedagogy de-democratize education and narrow students' and teachers' conceptions of personhood in ways that are potentially incompatible with democratic schooling. **Methodology:** Institutional ethnography of a single middle school site, conducted over ten months of full-time employment by the researcher-author, drawing on meticulous field notes and saved textual evidence including emails and internal communications. **Key Findings and Implications:** The article documents several concrete organizational and operational practices within the CMO: a corporate-style "rank and yank" staff evaluation system in which teachers were force-ranked and rankings circulated publicly; rapid and repeated schedule changes causing staff anxiety and heighten performativity; a "re-norming" process in which the entire school culture was periodically reset over three-to-five-day periods when behavioral standards slipped; and firing of teachers justified through the organization's mission-driven language. The author notes that the CMO operated with significant autonomy from bureaucratic constraints and accessed substantial philanthropic resources. Student test scores were explicitly treated as the primary metric of organizational success, functioning as an analog to corporate profit. The study surfaces a tension between school-wide behavioral management systems (merits and demerits) and efforts by individual staff to pursue more student-centered and equity-oriented practices. It further notes that institutional agents often operated in silos without coordinated school-level support for culturally sustaining approaches, suggesting that organizational alignment between departments is operationally significant.

Teacher Hiring, Retention, and Turnover

The three articles in this section document the structural and organizational factors that drive high teacher turnover in charter schools. A consistent finding across the literature is that charter schools exhibit teacher turnover rates approximately double those of traditional public schools, and that labor flexibility alone does not reliably translate into improved teacher quality or school stability (Naslund and Ponomariov, 2019). It is worth noting that all three studies focus predominantly on CMO-affiliated or no-excuses environments, and the extent to which these findings are generally applicable remains an open question.

The most actionable lessons from this section are cautionary. Many of the practices CMOs promote as organizational strengths — structured professional development, clearly defined hiring processes, and explicit cultural expectations — are the same factors that reduce teacher satisfaction and drive departure over time (McCluskey, 2024; Torres, 2023). Professional development that is overly prescriptive and unavailable beyond a teacher's first two years, rigid discipline requirements that limit teacher agency, and centralized decision-making that constrain principals are consistently cited as primary drivers of attrition. Notably, even a highly structured hiring process designed to set realistic expectations does not prevent significant declines in perceived fit by midyear, particularly around discipline practices and autonomy (Torres, 2023). For Georgia operators, this points to a core tension: the organizational practices that feel like quality control mechanisms can harm teacher satisfaction. Operators should examine whether their professional development offerings, discipline systems, and decision-making structures are creating the conditions in which teachers want to stay, not just the conditions in which schools can remove those teachers who do not perform.

McCluskey, M.S. (2024). Leave like a champion: Teacher embeddedness and turnover at an urban "no-excuses" charter management organization. *Journal of Education, 204*(3), 576–594.

Summary and Thesis: This multi-site case study examines the factors that reduce teacher embeddedness and ultimately drive turnover at two urban "no-excuses" CMO high schools. The article argues that many of the practices the CMO promotes as "best practices" are the same factors that reduce teacher embeddedness and contribute to high turnover, creating a self-undermining organizational model. **Methodology:** This is a qualitative, multisite case study of two urban high schools using semi-structured interviews and focus groups with current and previous school staff. **Key Findings and Implications:** The study finds that many of the practices the CMO proliferates as "best practice" are the same factors that reduce teacher embeddedness and contribute to high turnover rate. Professional development was cited by most participants as a reason they originally joined the CMO, yet it proved to be a primary source of reduced embeddedness: early professional development was perceived as overly prescriptive and script-based, and no substantive professional development was available for teachers beyond their first year or two. Other factors towards teacher dissatisfaction included long and demanding hours, rigid school culture and discipline requirements, and limited school-level agency. Despite teachers expressing notably high regard for their principals personally, teachers felt that principals had limited agency within the CMO's centralized structure.

Naslund, K., & Ponomariov, B. (2019). Do charter schools alleviate the negative effect of teacher turnover? *Management in Education, 33*(1), 11–20.

Summary and Thesis: This article examines whether the greater labor flexibility of charter schools dampens the typically negative effect of teacher turnover on student achievement and graduation rates compared to traditional public schools. The article argues that while charter schools' labor flexibility modestly reduces the negative effects of teacher turnover in math and

science, this advantage does not offset overall lower performance relative to traditional public schools. **Methodology:** Quantitative study using regression analysis of 2012–2013 Texas Education Agency district-level data for 998 traditional public school districts and 148 charter school organizations, with student standardized test pass rates in math, science, writing, and social studies and five-year graduation rates as dependent variables. **Key Findings and Implications:** Charter schools exhibited teacher turnover rates approximately double those of traditional public schools. Teacher turnover had a consistently negative direct effect on student outcomes across both school types. However, the negative effect of turnover was modestly reduced in charter schools for math and science pass rates specifically, providing partial support for the hypothesis that charter schools' labor flexibility allows them to remove underperforming teachers more effectively. Charter schools nonetheless performed significantly worse than traditional public schools on math and science pass rates even after controlling for demographic variables. Poverty and student racial composition remained the strongest predictors of student outcomes across all models. The authors note substantial variability in outcomes across charter school organizations, in contrast to the greater homogeneity found across traditional public school districts.

Torres, A. C. (2023). If they come here, will they fit? A case study of an urban no-excuses charter management organization's teacher hiring process. *Urban Education, 58*(3), 367–397.

Summary and Thesis: This study examines how a "no-excuses" CMO enacts a realistic job preview during its teacher hiring process, and how newly hired teachers' perceptions of fit change before and after beginning their positions. The article argues that despite a highly structured hiring process designed to set realistic expectations, newly hired teachers experience significant declines in perceived fit by midyear, particularly around student discipline practices and autonomy, suggesting structural mismatches that the hiring process alone cannot resolve. **Methodology:** This is a qualitative and mixed-methods single-case study of one CMO operating 10 schools in a northeastern state during the 2016–2017 school year. Data sources include new hire and midyear teacher surveys (n=76 and 31% response rate respectively), semi-structured interviews with six teachers, six principals, and three central office recruiters, and four central office screening documents; paired t-tests and deductive/inductive coding were used for analysis. **Key Findings and Implications:** Recruiters and principals described a highly defined, semi-standardized hiring process that emphasized honest and explicit communication of job expectations, including working hours, instructional coaching, and student discipline practices, with principals sometimes deliberately "downselling" the position to ensure realistic expectations. Teachers rated their initial fit as high or very high across person-job and person-organization fit measures, as well as the clarity of the hiring process. However, midyear surveys revealed statistically significant drops in perceived fit across multiple dimensions, with the largest decreases in match with student discipline practices, desired autonomy, input into school-wide decision-making, and educational philosophy. Teachers who left the organization showed the sharpest decline in fit with student discipline

specifically. Qualitative findings indicated that leadership instability, including principal transitions mid-year, was a key unanticipated factor that altered working conditions and contributed to unmet expectations for two of the six interviewed teachers who departed.

School Closure and Survival

The three articles in this section examine the predictors and patterns of charter school closure. While this literature is often framed as a policy tool for authorizers, it contains a clear set of early warning indicators that Georgia operators can use proactively to assess and strengthen their school's long-term viability. Charter schools close at rates more than five times those of traditional public schools, with approximately 28% closing within their first three years of operation (Mars and Bronstein, 2020; Harris and Martinez-Pabon, 2022), making survival planning a practical necessity rather than an abstract concern.

The research identifies a consistent set of closure risk factors that operators can monitor and act on. Low enrollment is among the strongest predictors of closure across all studies (Harris and Martinez-Pabon, 2022; Mars and Bronstein, 2020), and schools that launch with fewer than 50 students show notably lower survival rates across all time horizons. This underscores the importance of robust enrollment management and family communication strategies from the earliest stages of operation. Low academic quality, measured by both standardized achievement and community satisfaction ratings, is the second strongest predictor of closure, with community approval ratings emerging as a legitimate independent signal of closure risk (Harris and Martinez-Pabon, 2022). Operators should treat family and community satisfaction not as a soft metric but as an early warning indicator worth tracking systematically. The longitudinal evidence also offers an encouraging counterpoint: charter schools that remain open tend to improve over time, and schools that invest in leadership quality and instructional coherence show the strongest trajectories (Baude et al., 2020). The practical implication is that closure risk is not fixed at founding, it is shaped by ongoing organizational decisions around enrollment management, instructional quality, community trust, and leadership development. Schools that monitor these factors actively and intervene early are better positioned to move from the vulnerable early years into the long-term stability that the research suggests is achievable.

Baude, P. L., Casey, M., Hanushek, E. A., Phelan, G. R., & Rivkin, S. G. (2020). The evolution of charter school quality. *Economica, 87*, 158–189.

Summary and Thesis: This study examines how the quality of charter schools in Texas evolved between 2001 and 2011, arguing that cross-sectional comparisons of charter and traditional public schools are potentially misleading and that a longitudinal perspective better captures the effects of market dynamics, school closures, and programmatic characteristics on charter

school effectiveness. **Methodology:** This is a quantitative study using administrative microdata from the Texas Schools Project at the University of Texas at Dallas, covering over 366 charter school campuses and their enrollees from 2001 to 2011. The primary analytic tool is a school-level value-added model measuring contributions to mathematics and reading achievement, with supplementary matching estimators and regression analyses examining the role of student mobility, student selection, and adherence to a No Excuses philosophy. **Key Findings and Implications:** Charter school quality in Texas, as measured by mathematics and reading value-added, was initially highly variable and on average lower than in traditional public schools, but improved substantially over the decade. This improvement was driven by three dynamics: the voluntary and authorizer-mandated closure of lower-performing schools, improvement among schools that remained open, and higher average quality among new entrants post-2001. Schools that closed, whether voluntarily or by authorizer order, were drawn disproportionately from the lowest end of the quality distribution, and their removal was strongly associated with overall sector gains. Two factors contributed to these improvements: an increasing share of schools adhering to a No Excuses philosophy and a substantial decline in student mobility as the sector matured. Student selection into charter schools also became more favorable over time in terms of prior achievement and behavior, though compositional improvements explained relatively little of the overall sector gains. The paper also notes that some of the largest charter management organizations (CMOs) invested heavily in the identification and training of school leaders, including year-long apprenticeship programs, and identified leadership quality as a prime area for further research.

Harris, D. N., & Martinez-Pabon, V. (2022). Extreme Measures: A National Descriptive Analysis of Closure and Restructuring of Traditional Public, Charter, and Private Schools. National Center for Research on Education Access and Choice (REACH), Tulane University.

Summary and Thesis: This study describes the levels, trends, and patterns of school closure and restructuring across traditional public, charter, and private school sectors in the United States, and examines the financial, academic, and demographic predictors of those events. The article argues that charter schools close at rates far higher than traditional public schools, and that closure risk is most strongly predicted by low enrollment and low academic quality followed by race and income. **Methodology:** This is a quantitative, descriptive study using the National Longitudinal School Database (NLSD), which integrates federal Common Core of Data (CCD), the Private School Survey (PSS), Stanford Education Data Archive (SEDA) achievement data, and GreatSchools.org community ratings across essentially all K-12 schools in all 50 states and the District of Columbia. **Key Findings and Implications:** Between 2014 and 2018, the annual closure rates were 5.1% for charter schools, 2.9% for private schools, and 0.9% for traditional public schools (TPS), with charter schools also carrying the highest restructuring rate at 2.0% compared to 0.6% for TPS. These differences persisted even after controlling for student demographics, school characteristics, and state fixed effects. Low student enrollment was among the strongest predictors of closure across all sectors. Academic quality measures,

including standardized test score levels, achievement growth, and GreatSchools.org community ratings, were negatively associated with closure and restructuring, suggesting that higher-quality schools were less likely to be closed or restructured. Achievement level was the strongest single quality predictor, outperforming even enrollment in TPS and charter schools. Race and income were also statistically significant predictors of closure and restructuring even after controlling for other factors, though they were weaker predictors than financial and academic variables. The finding that community approval ratings (GreatSchools.org) are a valid predictor of closure risk supports the use of family and community satisfaction as a legitimate school quality metric.

Mars, M.M. & Bronstein, J.L. (2020). The population ecology of undesigned systems: an analysis of the Arizona charter school system. *Journal of Organization Design*, 9(17).

Summary and Thesis: This study applies a population ecology framework to 20 years of data on Arizona charter schools to identify the founding characteristics and structural features most predictive of charter school survival over time. The article argues that charter school survival is strongly predicted by founding enrollment size, charter holder type, and grade level served, and that the absence of system-level planning has produced an Arizona charter sector that resembles conventional public schools more than the innovative alternative the movement intended. **Methodology:** This is a quantitative longitudinal study using a dataset of 1,074 Arizona charter schools founded between 1996 and 2017. The primary analytic method is survival analysis using Kaplan-Meier estimators and log-rank tests, examining three predictor variables: charter holder type (district-run vs. other), initial enrollment size, and grade level range served. Median survival time for Arizona charter schools is 12 years, with approximately 28% of schools closing within their first three years of operation. **Key Findings and Implications:** Schools that survive beyond 15 years have a high probability of continued operation. Charter schools held by public school districts had dramatically lower survival rates compared to non-district-held charters. Initial enrollment size is a strong predictor of survival, with schools founding with fewer than 50 students showing notably lower survival rates than medium-large or large schools across all time horizons. Grade level range also predicts survival with schools serving the full K–12 range having the lowest 15-year survival probability and high schools having the highest. Elementary schools showed relatively high early failure rates but strong longevity once past five years. Mission type, such as College Preparatory, Alternative/At-Risk, or Traditional, did not emerge as a statistically significant predictor of survival. The authors argue that without system-level planning, charter school entrepreneurs defaulted to design choices most familiar to them as educators, producing a system that more closely resembles conventional public schools than the innovative alternative the Arizona charter movement intended.

Appendix A: Methodology

To respond to State Charter Schools Commission of Georgia's (SCSC) request on existing best practices for Charter schools, WestEd examined the peer-reviewed literature on charter school education, including research studies, reports, tools, and articles on both best practices for Charter Schools and Charter School evaluation metrics, in a systematic literature review.

WestEd used a multi-stage screening process to identify and select literature relevant to charter school best practices and evaluation metrics in Georgia and nationally. WestEd examined literature that spans a range of 10 years (2016-2026) of research to ensure that the information reported on is particularly relevant to the modern development of charter schools and data systems. WestEd did not restrict the years of data analyzed in the research.

The literature review was conducted primarily online through publicly available and reliable search engine, information databases, and repositories. Databases and search engines used included:

- EBSCO Host
- ERIC
- Google and Google Scholar
- SAGE Journals
- Researchgate.net

Keywords and phrases used to conduct online research on the literature included variations such as:

- Charter School Innovation
- Charter School Best Practices
- Charter School Organization best practice
- Charter School Operational best practice
- Charter School Financial Innovation
- Charter School Academic Innovation
- Charter School Student Focus

Database and search engine queries using the keywords and phrases described above yielded an initial pool of sources. Sources identified through multiple databases were deduplicated before screening began. 143 sources were identified as potentially being relevant to the literature review from the 5 research databases using the keywords and phrases

To screen the large pool of articles, WestEd researcher used Claude AI to screen the citations and abstracts of all identified sources against the following inclusion criteria:

- Published during or after 2016 (<10 years old)
- Charter school focused and addresses governance, accountability, performance, evaluation, or best practices. SCSC was particularly interested in the following three dimensions: Academic, Operations, and Financial best practices.
- Quantitative, qualitative or impact studies (no literature reviews).
- Peer reviewed.
- Pertains to the U.S. charter school context, with preference given to sources relevant to the Southeast or Georgia specifically.

Sources were excluded if they met any of the following criteria:

- Published prior to 2016
- Focused exclusively on non-charter public or private school models without relevance to charter school practices
- Literature review
- Not available in English
- Opinion pieces or news articles without an evidence base
- Non-peer reviewed

Of the 143 sources, 63 sources passed the citation and abstract screening. Sources that passed title and abstract screening were retrieved in full and reviewed in greater depth by one of three WestEd researchers. At this stage, reviewers assessed each source for methodological credibility and relevance to the review's core topics. Considerations included:

- Clarity and transparency of the research methodology
- Whether findings were evidence-based rather than purely advocacy-driven
- Relevance of findings to charter school governance structures, student outcomes, operational best practices, or accountability frameworks
- Sources that did not meet these standards upon full-text review were excluded, with the reason for exclusion noted.

To make exclusion decisions after the in-depth review, four WestEd researchers met to discuss whether specific articles should be included or excluded from the final corpus. Articles were excluded from the final corpus when researchers came to a unanimous decision.

Sources that passed full-text review were organized thematically and incorporated into the narrative and annotated sections of the literature review. The final corpus includes 48 sources spanning from longitudinal quantitative studies to localized case studies.

Appendix B: Matrix of Focus Areas and Geographic Priority Across Reviewed Literature

Given Georgia's distinct charter school landscape, the literature review organizes each source under its primary relevance to Georgia (Academics, Finance, or Operations) even where sources speak to multiple areas. The table below provides a complete mapping of each source's relevant focus areas and whether the study is set in the southeastern United States.

Table 1: Article Matrix by Key Focus Areas

In-Text Citation	Finance	Academics	Operations	Southeast
Barnard-Brak et al. (2018)	**Yes**	**Yes**	**Yes**	**—**
Barrett et al. (2022)	**Yes**	**—**	**Yes**	**Yes**
Baude et al. (2020)	—	Yes	Yes	—
Berends, M., & Donaldson, K. (2016)	—	Yes	—	—
Bridich, S.M. (2021)	—	—	Yes	—
Bruhn, S. (2020)	—	—	Yes	—
Buras, K. (2021)	Yes	—	Yes	—
Castillo, E. (2020)	Yes	—	—	—
Clarke, F. C., & Burt, W. L. (2018)	—	Yes	—	—
Corrales, A., & Peters, M. L. (2017)	Yes	Yes	—	—
Davis, F., & Boudreaux, M. K. (2019)	—	Yes	Yes	—

In-Text Citation	Finance	Academics	Operations	Southeast
Diehl, D., & Marx, R. A. (2019)	Yes	—	—	—
Ferrare et al. (2023)	—	Yes	Yes	—
Fifolt et al. (2024)	—	Yes	Yes	Yes
Gawlik, M. A. (2018)	—	Yes	Yes	—
Gawlik, M. A. (2019)	—	—	Yes	Yes
Glazer et al. (2019)	—	Yes	Yes	Yes
Gulosino, C., & Liebert, J. (2020)	Yes	Yes	Yes	—
Gulosino, C. A., & Şişli-Ciamarra, E. (2019)	—	Yes	—	—
Haber, J.R. (2021)	—	Yes	Yes	—
Harris, D. N., & Martinez-Pabon, V. (2022)	Yes	Yes	Yes	—
Huang, L., & White, J. (2023)	—	Yes	—	—
Jeffers, E.K., & Dixson, A.D. (2024)	—	—	Yes	Yes
Kimbrel, L. A. (2019)	Yes	Yes	Yes	Yes
Kingsbury et al. (2023)	—	Yes	Yes	—
Knight, D. S., & Toenjes, L. A. (2020)	Yes	—	—	—
Lancet et al. (2023)	—	—	Yes	—
Lewis, J., & Basford, L. (2020)	—	Yes	Yes	—
Lopez et al. (2018)	—	—	Yes	—
Maranto, R., & Shakeel, M. D. (2022)	—	Yes	Yes	—

In-Text Citation	Finance	Academics	Operations	Southeast
Mars, M.M. & Bronstein, J.L. (2020)	Yes	—	Yes	—
Marshall et al. (2022)	Yes	Yes	Yes	—
McCluskey, M.S. (2024)	—	—	Yes	—
Naslund, K., & Ponomariov, B. (2019)	—	Yes	Yes	—
Phelps et al. (2026)	—	Yes	—	Yes
Rohn, K. C. (2024)	—	Yes	Yes	—
Shelton, A. (2025)	—	Yes	Yes	—
Spees, L. P. (2019)	—	Yes	Yes	Yes
Stahl, G. D. (2020)	—	—	Yes	—
Szabo, J. (2022)	—	Yes	Yes	—
Telfer-Radzat, K. (2024)	—	Yes	—	—
Torres, A. C. (2020)	—	—	Yes	—
Torres, A. C. (2023)	—	—	Yes	—
Torres et al. (2019)	—	—	Yes	—
Trauth, J. N., & Harris, K. (2019)	—	Yes	Yes	—
Truong, F. R. (2019)	—	—	Yes	—
Weber, M., & Baker, B. (2018)	Yes	—	Yes	—
White, J., & Huang, L. (2022)	—	Yes	—	—