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A STUDY OF TEXAS PUBLIC CHARTER SCHOOLS FUNDING ALLOCATIONS  
AND STUDENT ACHIEVEMENT

by

Giselle Ivette Easton, M. Ed.

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by

Giselle Ivette Easton

APPROVED BY

---

Antonio Corrales, EdD, Chair

---

Michelle Peters, EdD, Committee Member

---

Randy O'Brien, EdD, Committee Member

---

Norma Veguilla-Martinez, EdD Committee  
Member

RECEIVED/APPROVED BY THE COLLEGE OF EDUCATION

---

Terry Shepherd, EdD, Associate Dean

---

Joan Y. Pedro, PhD, Dean

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## ABSTRACT

# A STUDY OF TEXAS PUBLIC CHARTER SCHOOLS FUNDING ALLOCATIONS AND STUDENT ACHIEVEMENT

Giselle Ivette Easton  
University of Houston-Clear Lake, 2024

Dissertation Chair: Antonio Corrales, EdD

The purpose of this mixed methods study was to examine the relationship between public charter school funding allocation and student achievement. The study included a review of archived data utilizing five years (2018-2022) of the Texas Education Agency (TEA) Charter Financial Integrity Rating System of Texas (e.g., financial accountability and administrative cost ratio), Public Education Information Management System (e.g., payroll expenditures, facility maintenance and operations expenditures, and superintendent salary), and Texas Academic Performance Reports (e.g., student achievement) of a purposeful sample of Texas Public Charter Schools (TPCS). Texas Public Charter School Superintendents were also interviewed to better understand the relationship between funding allocation and student achievement. Results indicated a positive correlation between medium-sized TPCS and (a) administrative cost ratio and (b) personnel expenses with student achievement. However, the results did not indicate a positive correlation with small-sized or large-sized TPCS. Additionally, the results did not indicate a positive correlation between financial accountability, operating expenditures, and superintendent salary for any sized TPCS. Alternatively, superintendents expressed that school funding regarding these themes: (a) strategic

priorities, (b) teachers' retention and support, (c) financial accountability, and (d) facility management have an impact on student achievement.

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## CHAPTER I: INTRODUCTION

In recent years, a national debate comparing public charter schools and traditional public schools (TPS) has gained momentum, focusing on funding allocation and student achievement (Chen & Harris, 2022; Nowicki, 2021; Shakeel et al., 2021). This debate seeks to determine the most effective use of public funds to meet students' academic goals. Research on charter schools has yielded mixed results, and the variability in public charter school systems necessitates a closer examination (Dallavis & Berends, 2023; Nowicki, 2021). Significantly, student achievement and fund allocation differ among charter organizations, further underscoring the complexity of this issue (Dallavis et al., 2022; Nava, 2019), and questions about funding allocation and consistency within charter school systems remain (Dallavis & Berends, 2023; Nava, 2019; Shakeel et al., 2021). Despite a substantial demand for Texas public charter schools (TPCS) with 375,000 students currently in attendance, TPCS receive, on average, 6% less funding than TPS, with over 66,000 students on TPCS waitlists a 13.5% increase in the past year (Texas Education Agency [TEA], 2022). There is much less research on the specific relationship between funds allocations within TPCS, leaving significant gaps in our understanding (Dallavis & Berends, 2023; Nowicki, 2021; Shakeel et al., 2021). The present study will contribute to previous examinations seeking answers to funding and achievement with a focus on TPCS: Is funding allocation a determining factor in student achievement in Texas public charter schools?

### **Research Problem**

In 1991, Minnesota introduced the first charter school to improve the public school system by inciting competition after the report *A Nation at Risk* was presented (Wohlstetter et al., 2015). Traditional public schools had little to no familiarity with

competing for student enrollment until that point (Gallo, 2014). The Charter school movement reached Texas with the 74th legislature in 1995 (TEA, 2011), authorizing the State Board of Education (SBOE) to establish open-enrollment public charter schools in the state. Texas Public Charter Schools are completely independent local education agencies and will be referred to as TPCS. Like traditional public school (TPS) districts, TPCS charter districts are monitored and accredited under the statewide testing and accountability system. They may operate multiple campuses, and they are not allowed to charge tuition. However, unlike traditional school districts, TPCS charters may operate in more than one metropolitan area, may serve only a subset of grades, and may place limits on the number of children allowed to enroll.

According to the Texas Education Agency, during the 2021-22 academic year, there were a total of 185 charter schools authorized by the state, along with 878 charter school campuses also under state authorization. Given the substantial demand for Texas public charter schools (TPCS), there are 375,000 students currently in attendance, reflecting a 3.1% increase in the past year (TEA, 2022). This significant growth underscores the 7.0 percent of the total Texas public school population that attended state-authorized charter schools during the 2021-22 academic year (TEA, 2022).

Research on charter schools has ignited a national debate, with contrasting opinions on their effectiveness in comparison to traditional public schools (Barden & Lassmann, 2016; Dallavis & Berends, 2023). This debate often sidelines the intricate budgetary operations within public charter schools, which exhibit significant variations from one institution to another (Gallo, 2014). Charter schools' origins in the early 1990s were grounded in the aspiration to provide an alternative for students encountering difficulties in their current school settings (Nava, 2019). These charter schools, such as those in Texas (Chen & Harris, 2022), offer students a distinct advantage as they serve as

an alternative educational option, providing autonomy over resources, curriculum, and personnel decisions that enhance accountability and effectiveness (Buerger, 2020).

Additional research on whether charter schools offer a better academic outcome than what traditional public schools provide is divided, as some students perform better on standardized tests in charter schools while others do not (Barden & Lassmann, 2016). Dallavis and Berends (2023) suggested that the growth of charter schools could be attributed to national leaders promoting charter schools to families. Policies favoring charters emerged primarily because traditional public schools were failing to maintain the support and approval of the public due to limited options, poor management, little accountability, and heavy bureaucracy (Kretchmer et al., 2014).

Charter school supporters maintain that traditional school districts lack the incentive to provide education effectively because their structures and processes are too political and bureaucratic (Buerger, 2020). Expanded autonomy over resources and curriculum and more accountability pressure generated by school choice (Nathan, 1996) is why advocates expect public charter schools to be more effective than traditional public schools. The topic of charter schools providing additional educational opportunities for disadvantaged students is discussed in a new and thorough literature review by Zimmer et al. (2020). In addition, evidence shows that charter schools are less likely to enroll students with disabilities than traditional public schools. In a national evaluation, Epple et al. (2016) offer proof that charter, and traditional schools serve a comparable number of students getting free or reduced-price lunch. Public Charters and traditional public schools have been compared in many ways, but charters and their different budget operation allocations are not as much.

At the same time, the financial disparities and funding allocation challenges faced by charter schools, including the lack of facility funding, have raised concerns (Gleason,

2017; Wood, 2019). Traditional public schools have struggled to be effective, with limited options, poor management, little accountability, and heavy bureaucracy (Kretchmer et al., 2014). The existence of charter schools, operating outside of the traditional public school framework, offers the potential for increased competition and improved educational outcomes (DeAngelis & Barnard, 2021). As students attending state-authorized charter schools constitute a significant portion of the total Texas public school population (TEA, 2022), it is essential to delve deeper into the diverse budgetary operations within public charter schools and their potential impact on student achievement.

In Texas, the landscape of charter school growth has witnessed a substantial evolution in recent years. According to the Texas Education Agency (TEA), the state has seen a marked increase in the number of charter schools, aligning with national trends (TEA, 2020). Legislative initiatives, such as House Bill 1882 enacted in 2017, have played a pivotal role in fostering this growth by encouraging collaborations between traditional school districts and charter schools, thereby expanding educational options (Texas Legislature, 2017). This legislative impetus has led to a notable surge in charter school enrollment across Texas, providing families with alternative choices in education (TEA, 2020). While supporters emphasize the innovative and specialized approaches that charter schools offer, critics raise concerns about funding disparities and accountability frameworks (Bernal, 2019; Texas Association of School Boards, 2020). Given all the debate around charter schools, this study must look deeper at the various operating systems within public charter schools and determine the impact of funding allocations on student achievement.

## **Significance of the Study**

The study focuses on the relationship between funding allocation and student achievement, which has been constantly examined and visited during the past decades. The profound impact of school finance on student performance is well-documented in existing literature (Baker et al., 2012; Carpenter, 2013). Moreover, the ongoing debate on charter schools, a subject thoroughly explored by both advocates and critics (Barden & Lassmann, 2016; Dallavis & Berends, 2023; DeAngelis & Barnard, 2021), adds another layer of importance to this research. Texas, one of the states with the highest number of charter schools, houses 185 Texas Public Charter Schools (TPCS), accommodating approximately 375,000 students (TEA, 2022). This fact underscores the pivotal role of Texas in the charter school movement. Consequently, there is an imperative need to expand our comprehension of how the financial practices of Texas charter schools affect student achievement (Baker et al., 2012; Carpenter, 2013). It is vital to increase the knowledge and understanding of the relationship between Texas charter schools' expenditure and student achievement.

## **Research Purpose and Questions**

The purpose of this study was to examine the relationship between public charter school funding allocation and student achievement. The following research questions guided the study:

Is there a relationship between the financial accountability rating and student achievement within small, medium, and large charter schools?

Is there a relationship between the administrative cost ratio and student achievement within small, medium, and large charter schools?

Is there a relationship between personnel expenditures and student achievement within small, medium, and large charter schools?

Is there a relationship between facilities maintenance and operations expenses and student achievement within small, medium, and large charter schools?

Is there a relationship between the superintendent's salary and student achievement within small, medium, and large charter schools?

What are the superintendent's perceptions concerning the impact of public charter school funding allocations on student achievement?

### **Definitions of Key Terms**

The following are the key terms used throughout this dissertation.

**Administrative Cost Ratio:** The administrative cost ratio measures if the charter school's administrative cost ratio is equal to or less than the threshold ratio based on Average daily attendance size (Charter FIRST: 2020-2021 Rating based on Fiscal Year 2020 data, 2018)

**Charter Financial Integrity Rating System of Texas (FIRST):** The financial accountability rating system administered by the TEA in accordance with the Texas Education Code (TEC, 2021, §39.082 and §39.085). The system provides additional transparency to public education finance and meaningful financial oversight and improvement for school districts (School FIRST) and open-enrollment charter schools and charter schools operated by a public institution of higher education under TEC (2023, chapter 12, subchapters D and E; Charter FIRST; Tex. Admin. Code., 2023, §109.1001)

**Facility Maintenance and Operations:** This function code series is for costs for non-student-based school district support services that do not directly support students (TEA, 2022).

**Payroll Expenditure:** This primary category comprises the total compensation, including salaries, wages, and employee benefit expenses. When an individual receives a salary or wage, the nonprofit charter school assumes a supervisory role over them,



provides or authorizes the workspace, and typically supplies the necessary equipment and materials for their tasks. Even if an employee may collaborate with multiple supervisors at various times, if the work is conducted under the general direction of the nonprofit charter school, the amount paid to that employee is categorized as a payroll cost (TEA, 2022).

**Percentage at Meets Grade Level or Above:** The percentage of assessments that met or exceeded the Meets Grade Level standard. Percentage Meets Grade Level or Above. The percentage of assessments that met or exceeded the Meets Grade Level standard (TEA, 2021).

**Public Education Information Management System (PEIMS):** a data tracking network used by the Texas Education Agency (TEA) for all reported and requested data concerning student information, school performance, financial, personnel, and other confidential information (TEA, 2008).

**Student Achievement:** For the purpose of this study, student performance is identified as the student percentage at the meets grade level or above in all STAAR and STAAR EOC exams (TEA, 2019). Students who “meet grade level” performance are likely to be successful in the next course and are on track to be post-secondary ready (TEA, 2017).

**State of Texas Assessments of Academic Readiness (STAAR):** A comprehensive testing program for public school students in grades 3–8 or high school courses with end-of-course (EOC) assessments. The STAAR program is designed to measure to what extent a student has learned, understood, and is able to apply the concepts and skills expected at each grade level or after completing each course for which an EOC assessment exists. Each STAAR assessment is linked directly to the Texas Essential

Knowledge and Skills (TEKS). The TEKS are the state-mandated content standards that describe what a student should know and be able to do upon completion (TEA, 2021).

Superintendent: The chief executive officer and educational leader for a school district

(TEC, 2022, chapter 11, subchapter E).

Texas Academic Performance Reports (TAPR): is a document that pulls together a wide range of information on the performance of students in each school and district in Texas every year. Performance is shown disaggregated by student groups, including ethnicity and socioeconomic status. The reports also provide extensive information on school and district staff, programs, and student demographics (TEA, 2023).

Texas Public Charter School: An open-enrollment charter school that is part of the Texas state's public school system. Education (TEC, 2005, chapter 12, subchapter A).

Traditional Public School: A group of schools within a geographical area, led by a superintendent and locally governed by a community-elected board, whose primary responsibility is to carry out the state's system of public education (TEC, 2005, chapter 11, subchapter A).

### **Conclusion**

This chapter presented a synopsis of the need for the study, the significance of the problem, the research purpose and questions, and critical definitions of this study. The present study will contribute to previous examinations seeking answers to a frequently go-to question: Is funding allocation a determining factor in student achievement in Texas public charter schools? The next chapter provides a literature review of the major topics that will capture this study.

## CHAPTER II: REVIEW OF THE LITERATURE

Public Charter School studies that have addressed the relationship between funding expenditures and student achievement have focused mainly on comparing Public Charter Schools with Traditional Public Schools (Carpenter, 2013). This study examined the relationship between Texas public Charter school funding allocation and student achievement in the areas of Charter Financial Integrity Rating System of Texas (FIRST) rating, administrative cost ratio, payroll expenditures, facility maintenance and operations, and superintendent salary. To address these areas, the literature review focused on: (a) student achievement, (b) financial accountability, (c) administrative and personnel expenditures, (d) facility maintenance and operations, and (e) superintendent salary.

### **Student Achievement**

In a national analysis of the impact of charter schools Chen and Harris (2022) look at student outcomes, including indirect effects on nearby public schools. The study, spanning data from nearly all U.S. school systems over two decades, delves into the impact of charter schools, with a particular focus on systems where at least 10% of students attend charter schools (Chen & Harris, 2022). The research reveals noteworthy findings: there's a substantial 2-4 percentage point increase in high school graduation rates, along with a 6 percentile boost in math scores and a 3 percentile improvement in reading scores. Moreover, these improvements in math scores are most prominent in metropolitan areas, middle schools, and mathematics when compared to reading (Chen & Harris, 2022). Importantly, these positive effects cut across various demographic groups, encompassing Black, Hispanic, white, low-income, and higher-income students (Chen & Harris, 2022).

The study indicates that these beneficial effects commence at around 5% charter market share and persist up to 15%, beyond which they don't grow further (Chen & Harris, 2022). Furthermore, the impact of charter schools on student outcomes is attributed to three main mechanisms: their effectiveness relative to nearby traditional public schools, the competitive pressure they exert, driving improvements in traditional public schools, and their role in prompting the closure or takeover of underperforming traditional public schools, which emerges as a pivotal factor in these effects (Chen & Harris, 2022).

A case study by Sahin et al. (2018) examined student achievement in Harmony Public Schools (HPS), a charter school network, over three years (2009-2011). They compared HPS to traditional public schools, finding that HPS performed better at grade 9 in mathematics, equally in grade 10, and worse at grade 11. In science, HPS did better at grades 10 and 11. Overall, HPS consistently outperformed other schools from grades 4 to 11, confirming the charter schools' commitment to providing quality education (Sahin et al., 2018).

Adding to the literature, Carlson (2023) investigates the impact of demographic changes on the number of English Learners (ELLs) in Texas schools, with a focus on ELLs in charter schools. The study answers three key research questions using extensive student-level data and analytical techniques. It reveals that charter schools in Texas enroll a substantial proportion of ELLs. These charter school students show slightly better progress in reading but somewhat less progress in math compared to their traditional public school counterparts. ELLs in Texas charter schools are more likely to graduate high school, attend college, and earn higher post-college incomes. However, math gains among ELLs in Texas charter schools fluctuate as the charter sector expands (Carlson, 2023). In summary, ELLs benefit from attending charter schools, but the charter school

movement in Texas requires responsible growth, accountability, and adequate funding to achieve its goals. The study also highlights potential trade-offs between reading and math achievement for ELLs (Carlson, 2023).

A study of Charter schools in California examined student performance in suburban charter schools and compared it to traditional public and urban charter schools (Gulosino et al., 2020). Using data from 2009 to 2012, the researchers found that suburban charter schools, particularly in high-income areas, do not improve academic achievement compared to traditional public schools. In fact, they often lead to unchanged or diminished student achievement in both math and English Language Arts (ELA) (Gulosino et al., 2020). This research highlights the need to consider charter school performance across different geographic contexts and underscores the implications of school choice policies in suburban settings (Gulosino et al., 2020).

A study by Reber et al. (2023) investigates the impact of attending oversubscribed high-quality charter schools in Los Angeles on student success; the research reveals that enrolling in a charter school is associated with improved 11th-grade standardized test scores and a significant increase in college enrollment and persistence. Specifically, students are more likely to attend and succeed in four-year colleges, with substantial gains in University of California (UC) campuses (Reber et al., 2023). Particularly, UC campuses, known for their higher graduation rates, play a crucial role in enhancing students' post-secondary success. This underscores the significance of charter schools in promoting student achievement and advancing educational opportunities, particularly in urban "no excuses" charter settings (Reber et al., 2023). The positive outcomes are more pronounced among students with lower prior achievement, underlining the potential of charter schools to bridge achievement gaps and enhance student success (Reber et al., 2023).

Adding to the academic performance of students in charter schools a study of Midwestern urban charter schools compared to those in traditional schools over a 5-year period (Clarke et al., 2019). Using a quasi-experimental design, data from 31 urban school districts and 88 adjacent charter schools were analyzed. The findings indicate that students who switched from traditional public schools to charter schools did not initially outperform their peers in mathematics and reading and had lower attendance rates during the first three years (Clarke et al., 2019). However, in the following two years, charter school students surpassed traditional students in both reading and mathematics, with improved attendance rates. Additionally, the study highlighted the significant impact of students' ethnic and socioeconomic backgrounds on their academic outcomes (Clarke et al., 2019).

A study of Michigan Charter Schools examines the academic performance of charter schools in Michigan over a 10-year period compared to traditional public schools (Murphy & Izraeli, 2019). The research aims to determine whether charter schools outperform similar public schools (Murphy & Izraeli, 2019). The study uses a dataset covering academic years 2002/2003 to 2011/2012, focusing on math and reading test scores for Grades 4, 7, and 11. Various factors are considered, and random effects estimation is used (Murphy & Izraeli, 2019). The findings show that Michigan charter schools initially underperformed public schools in both subjects and grade levels but caught up by the end of the study period. This suggests that, despite the competitive charter environment in Michigan, charter schools performed similarly to public schools in academic achievement by the study's conclusion (Murphy & Izraeli, 2019).

A recent study (Shakeel et al., 2021) examines trends in student performance in charter schools and district schools between 2005 and 2017 using National Assessment of Educational Progress (NAEP) data. The study finds that charter schools demonstrated

greater improvements in student performance during this period, equivalent to almost half a year's extra learning (Shakeel et al., 2021). These gains were most notable for African American and low socioeconomic status students in charter schools. Furthermore, a significant portion of these improvements in charter schools could not be attributed to demographic factors, indicating improved teaching and learning environments in the charter sector (Shakeel et al., 2021). This suggests that charter schools have become more effective, particularly for disadvantaged students, despite potential political resistance to their growth (Shakeel et al., 2021).

Another study investigates the impact of charter schools on traditional public school students' achievement (Kalulu et al., 2020). This study explores how teacher freedom in charter schools affects student performance. Student achievement is measured by the percentage of 8th-grade students reaching proficiency levels on the National Assessment of Educational Progress exams (Kalulu et al., 2020).. The findings reveal a positive relationship between teacher autonomy in charter schools and the performance of students in traditional public schools. Charter schools, with their flexible and innovative teaching environments, appear to contribute to improved student achievement in traditional public schools. This suggests that introducing competition into the education system, similar to competitive markets, has a positive influence on student success (Kalulu et al., 2020).

Charter school effectiveness in improving student achievement remains uncertain. While small-scale studies focusing on high-performing charters yield positive results, larger observational studies encompassing a wider range of charter schools are less promising (Spees & Lauen, 2019). In North Carolina, charter school performance has shown improvement over time, although it often falls short of traditional public schools (Spees & Lauen, 2019). Importantly, there's evidence that black and economically

disadvantaged students may experience slightly more achievement growth in charter schools, particularly in reading, in comparison to white and more advantaged students (Spees & Lauen, 2019). These mixed findings suggest that charter schools may benefit some students more than others, depending on their background and the quality of their previous schools. (Spees & Lauen, 2019)

### **Financial Accountability**

Exploring the financial accountability of charter schools, DeJarnatt (2012) focused on the risk associated with their use of over \$9 billion in annual public funds. Charter schools often have ties to parent organizations, and the article uses Philadelphia as an example, where many students attended charter schools in 2011–2012 (DeJarnatt, 2012). One issue highlighted is the prevalence of volunteer boards in charter schools, which often lack the time and training to fulfill their responsibilities. Additionally, the regulatory system for nonprofit organizations allows charter schools to file informational tax returns with the IRS but lacks continuous oversight capacity 2012 (DeJarnatt, 2012).

Despite these challenges, two oversight tools, the Controller's Report and IRS 990 forms, help identify financial irregularities and transparency issues. DeJarnatt (2012) recommends clarifying governance and financial accountability standards in charter school laws, limiting overlapping board memberships, and providing regulators with a wider range of tools, including intermediate sanctions. The focus should be on guidance as well as enforcement in 2012 (DeJarnatt, 2012).

Kaplan and Owings (2018) article analyzes Betsy DeVos's policies aimed at privatizing American education through initiatives like charter schools and vouchers. The authors discuss concerns about the financial accountability of these programs and their impact on student achievement (Kaplan & Owings, 2018). They argue that education, unlike a business, is a crucial public good, expressing skepticism about the push for



school choice programs driven by market-oriented ideologies. The article highlights the importance of state oversight in maintaining accountability and improving the quality of education (Kaplan & Owings, 2018).

Continuing the examination of financial accountability, Knight and Toenjes's (2020) article examines charter schools in comparison to traditional public schools using data from Texas. They assess whether charter schools receive equitable funding compared to similar non-charter traditional public school districts and investigate the impact of funding differences on overall state expenditure in K–12 education when students transfer between sectors (Knight & Toenjes, 2020). The study finds that, on average, each student transferring to a charter school increases the cost to the state by \$1,500. The authors discuss policy challenges related to funding adjustments for small charter schools, financing for students with disabilities, and the conversion of total funding rates to per-student values, emphasizing the need for equitable and efficient finance structures in education (Knight & Toenjes, 2020).

In a 2021 study, Ladd and Fiske examine financial accountability in charter schools, with a strong focus on equity. They challenge the notion that charter schools inherently benefit disadvantaged students, arguing that relying solely on market-based accountability is insufficient to ensure equitable access and support (Ladd & Fiske, 2021). Using the Massachusetts system as an example, the study found that while many charter schools in the state enrolled their fair share of economically disadvantaged students and those with disabilities, fewer did so for English learners (Ladd & Fiske, 2021).

Additionally, they noted a lack of certified staff to teach English language learners and students with special education needs, as well as insufficient support systems and instructional quality in many charter schools (Ladd & Fiske, 2021). The authors

stress the need for intentional charter school policies that not only promote equitable access for disadvantaged students but also ensure high-quality education. They point to the Massachusetts approach as a promising model for achieving these goals through robust authorization policies and equity-focused site visits (Ladd & Fiske, 2021).

In an effort to explore the historical context of educational reforms initiated in the 1990s, Peurach et al. (2019) aims to provide high-quality education for all students. They focus on the clash between these new educational ambitions and legacy educational institutions. The authors examine different educational system domains, including managerial, market-driven, involving charter schools, federated, and networked structures. Their findings reveal that despite challenges and turbulence in the education sector, sustained support for new educational goals creates opportunities for these ambitions to shape public school districts' structures and operations (Peurach et al., 2019). The researchers highlight the importance of public accountability, with an emphasis on leaders' political and administrative responsibilities, and the need for coherent educational and accountability infrastructures within schools (Peurach et al., 2019).

Looking at the Ohio fiscal system, Thompson (2019) investigates the impact of financial intervention systems on electoral accountability in school districts. The study finds that these financial labels, especially the severe ones leading to state takeovers, result in greater turnover of school board members and administrators. This indicates that citizens in these districts place more accountability pressure on officials due to sanctions, like state takeovers, rather than the financial information conveyed by these labels (Thompson, 2019). The research also suggests that electoral pressures may encourage school boards and administrators to balance fiscal responsibility and academic

performance, highlighting the importance of fiscal prudence alongside student achievement in shaping district policies and outcomes (Thompson, 2019).

Focusing on other areas of financial accountability, Barton et al. 2022 study focuses on Texas public schools in producing college, career, and military-ready (CCMR) graduates. Using data from the 2017–2018 school year for 1054 districts, they employed data envelopment analysis (DEA) to measure each district's relative efficiency in achieving CCMR goals. The CCMR metric encompasses a wider range of student success indicators beyond standardized test scores, highlighting diverse programs and areas of study (Barton et al., 2022). The study suggests that legislators and policymakers should consider emphasizing CCMR in funding and accountability, as it demonstrates that school districts have the capacity to support a broader spectrum of student success when not solely focused on standardized test outcomes. In summary, the study examines the financial accountability of Texas school districts in producing CCMR graduates and recommends a broader emphasis on these metrics for funding and accountability purposes.

Adding to the literature a study investigates the impact of donor, financial expert, and founder representation on the governing boards of charter schools in Massachusetts from 2001 to 2013 (Gulosino & Ciamarra, 2019). Donor presence on these boards is associated with improved financial performance, attributed to their strong monitoring incentives due to financial investments. Importantly, this enhanced financial performance does not come at the cost of academic outcomes; donor representation is also linked to higher student achievement (Gulosino & Ciamarra, 2019). In contrast, founder representation on charter school boards is linked to lower financial performance but higher academic achievement. Academic performance is measured through three

indicators derived from English Language Arts and Math scores (Gulosino & Ciamarra, 2019).

Charter schools in the U.S. rely on per-student payments, which consist of base and compensatory payments (Buerger, 2020). The former can vary by location, while the latter is intended for students with special needs. In states with varying base payments, charter schools tend to establish themselves in less efficient school districts, where they can offer programs that enhance student performance or attract students. However, there's limited evidence that compensatory payments impact charter school locations (Buerger, 2020). These findings have implications for financial accountability. Policymakers can influence charter school locations through base payments, potentially improving the efficiency of education provision (Buerger, 2020). In contrast, compensatory payments may not create strong location incentives due to their current size. It's essential to consider student composition when comparing efficiency between charter and traditional schools. Achieving policy goals may be more challenging than anticipated, especially regarding educating high-cost students efficiently while maintaining economies of scale (Buerger, 2020).

Charter schools in the United States, operational for nearly 30 years and serving over 3.1 million students, lack substantial research on their financial savings capacity (Arapis & Brandon, 2021). A study examining Pennsylvania charter schools from 2011 to 2019, focused on their fiscal savings practices, encompassing both restricted and unrestricted fund balances. The primary savings vehicle for charter schools is the unrestricted fund balance, although they consider all fund balance classifications (Arapis & Brandon, 2021). An unexpected finding is that special education enrollment significantly impacts unrestricted fund balances, demanding attention from policymakers. Moreover, participation in the state pension system diverts resources from other essential

needs. In summary, many charter schools maintain insufficient fiscal savings, emphasizing the necessity of statutory fund balance minimums and the adoption of well-defined fund balance policies (Arapis & Brandon, 2021).

### **Administrative and Personnel Expenditures**

In an effort to examine the per-pupil spending of major charter management organizations (CMO), in New York City, Texas, and Ohio, Baker et al. (2012) compared to traditional district schools. They collected data on spending, school size, grade levels, and student populations for both charter and district schools. The findings showed varying spending levels in both charter and district schools. In some cases, high-profile charter network schools in New York City and Texas outspent similar district schools, while in Ohio, certain charter network schools spent less. Notably, in Texas, some charter chains, like KIPP, spent significantly more per pupil than similar district schools, up to 30% to 100% more, based on various measures (Baker et al., 2012).

Analyzing instructional investment, Kramer et al. (2017), research investigated the impact of charter system conversion on resource allocation, particularly administrative expenses. They studied 173 school districts in Georgia from 2003 to 2014, focusing on financial and staffing outcomes. The results showed that after conversion to a charter system, there was an increase in central office spending and staffing, indicating changes in resource allocation, specifically in administrative areas (Kramer et al., 2017).

One cannot look at school personnel without looking at teachers. Barrett et al. (2020) policy brief examines teacher retention and compensation in New Orleans' charter schools. They compared New Orleans to neighboring districts from 2010 to 2015 and assessed the impact of teacher turnover and compensation on teacher performance. The findings suggest that charter schools, with their autonomy, aim to increase teacher accountability and reward performance. However, high turnover rates and lower teacher

experience levels pose challenges in achieving exceptional schools in this context (Barrett et al., 2020).

Another Study by Barrett et al. (2022) looks at teacher retention and compensation in New Orleans charter schools. They found that teacher performance and retention were more closely connected in charter schools, and there was a positive link between salary and performance, particularly for teachers switching between charter schools. However, overall teacher turnover didn't improve teacher quality due to lower teacher quality in New Orleans compared to neighboring districts. The study suggested that market schools had the potential to use salary as an incentive, but this was more evident when teachers changed schools. There was no evidence of selective pay increases within schools for teachers with better performance.

A NCES report by Cornman et al. (2020) presents new data on public elementary and secondary education revenues and expenditures for fiscal year (FY) 2018. This report provides comprehensive information on school finance, including revenue and expenditure totals, revenue sources, expenditure functions and objects, current expenditures, and current expenditures per pupil. Expenditure functions encompass various categories such as instruction, instructional staff support services, pupil support services, administration, operations, student transportation, and more, with specific breakdowns of spending on salaries, benefits, services, supplies, and equipment (Cornman et al., 2020).

The findings reveal that in FY18, a significant portion of the current expenditures for public elementary and secondary education, totaling \$511.5 billion, was allocated to salaries and wages (\$358.1 billion) and employee benefits (\$153.5 billion). Additionally, expenditures for instruction and instructional staff support services accounted for 65.4

percent of the total current expenditures, amounting to \$418.8 billion (Cornman et al., 2020).

In an analysis on Budget Expenditure Allocations in Charter Schools' by Carpenter (2013), expenditure allocation patterns of charter schools in Texas graduation rates were studied. Findings indicated the allocation patterns of charter schools do differ from those of non-charter public schools. Specifically, after controlling for various student and school characteristics, charter schools allocate approximately two percentage points less than non-charters to instruction, 1.76 percentage points less to instructional services, and two percentage points less to support services. These differences were statistically significant, and the differences in instructional services, support services, and "other costs" were practically substantial, as measured by effect sizes.

Another examination on expenditures by DeAngelis and Barnard (2021) study examined how competition from public charter schools affects traditional district schools, particularly in terms of staff expenses and the desire for budget autonomy. They conducted this research with a sample of Texas public schools. Their findings indicated that the presence of anticipated charter school competition had a significant negative impact on traditional school leaders' reported spending on specific support staff categories (DeAngelis & Barnard, 2021). However, it did not increase the desire for more budget autonomy. The negative effects on support staff spending were more pronounced for experienced school leaders (DeAngelis & Barnard, 2021).

A study in New York looks at the impact of tax cuts on school district salaries. Nguyen-Hoang and Zhang (2022) examine the fiscal impact of New York's property tax levy limit on school districts. Using a difference-in-differences approach, it found that the tax limit has constrained many school districts, leading to significantly lower total current expenditures per pupil in affected districts (Nguyen-Hoang & Zhang, 2022). This

reduction is not due to teacher salaries or fringe benefits but comes from other areas like instructional salaries/expenses, central administration, transportation, interfund transfers, and undistributed spending (Nguyen-Hoang & Zhang, 2022).

Looking at national data on school site expenditures to compare spending differences between traditional district-operated schools and charter schools managed Weber and Baker's (2018) hypothesis is that for-profit charter schools, under greater pressure to reduce expenses, spend less on staffing compared to nonprofit charters and district schools. The analysis, conducted at both national and state levels, examines schools of similar size, grade ranges, and student attributes. The findings support the hypothesis, revealing that, on average, charters spend less per pupil on instructional salaries compared to districts, with for-profit charters spending even less than nonprofits (Weber & Baker, 2018). The difference in instructional spending is statistically significant in various states. The study indicates that management preferences and practices are the key drivers of these spending variations (Weber & Baker, 2018).

Investigating the impact of restructuring teacher compensation salary schedules on teacher staffing in South Carolina using panel data from 2012-2014 across 80 public school districts, Tran and Buckman (2020) found that districts with frontloaded salary schedules had a higher percentage of highly qualified teachers. This suggests that frontloading salary schedules may enhance teacher qualifications and, consequently, student achievement. School principals, responsible for hiring qualified teachers, can consider repurposing existing resources to attract highly qualified educators in regions facing recruitment challenges and financial constraints (Tran & Buckman, 2020).

### **Facilities Maintenance and Operations**

A three-decade education policy analysis by Dallavis & Berends (2023) discussed charter school policies that aimed to improve three main aspects of schools—autonomy,



innovation, and accountability—with the intention of promoting advances in curriculum, instruction, and learning that lead to better student outcomes. The researchers state that Charter research tends to neglect school organizational and instructional conditions by showing that charter schools have inconsistent effects on student achievement scores. This finding, the authors claim, masks heterogeneous effects among different types of charter schools, their operators and authorizers, and the organizational and instructional conditions under which they function (Dallavis & Berends, 2023).

The authors of this study posed specific research questions (Dallavis & Berends, 2023): (a) they inquired into the aspects of charter school organizational and instructional conditions that have been the focus of recent research and the research methods employed in their investigation; (b) they sought to discern the insights gained from this research, particularly in relation to various dimensions of school organization and schooling activities that facilitate student learning. The conceptual framework for their study was drawn from Gamoran et al. (2000) and emphasized the interdependent relationship between organizational resources and teaching practices, highlighting that the support for innovation and success within educational organizations requires a symbiotic connection with reciprocal feedback and growth in both directions (Dallavis & Berends, 2023). Regarding the expenditure of charter schools on material resources, the authors acknowledged a paucity of literature on this topic. However, they did identify evidence indicating that charter schools allocated fewer resources per student to instruction compared to traditional public schools (TPSSs) while achieving superior academic outcomes. This financial aspect suggests that funds are going to another area besides instruction.

In a compelling study analyzing the economics of education, Kho et al. (2020) examine four contentious policy issues related to charter schools: (a) the impact of

student profiles on traditional public schools (TPSs); (b) funding disparities between charter and TPS schools; (c) the influence of charter schools on student achievement; and (d) the effects of charter school competition on TPS performance. Critics argue that charter schools draw resources away from TPSs, potentially stifling their innovation and exacerbating segregation (Kho et al., 2020). Funding for charter schools is often lower due to differences in state funding and the expectation that charter schools cover facilities from their operating revenue, creating funding gaps (Kho et al., 2020). The researchers show that studies that have used a student fixed-effect approach for gauging teaching effectiveness, in data specifically drawn from Texas schools, have found mixed results: charter schools that focused on at-risk students provided slightly more value-add than traditional public schools while non-at-risk charters provided slightly less value-add than traditional schools (Kho et al., 2020).

Trying to contribute to the charter versus traditional public school discussion Smart (2019) aimed to compare resource-allocation practices to determine which model is more effective in achieving better outcomes for student growth and proficiency. Smart (2019) conducted a quantitative study comparing resource-allocation practices in charter and traditional public schools to determine their impact on student growth and proficiency. This research focused on a population of 60 schools in a large urban center in Michigan, with 28 charter public schools and 37 traditional public schools, primarily serving economically disadvantaged students, including a predominantly African American student body exceeding 90 percent. The study utilized financial and assessment data, applying multiple-regression modeling and independent t-tests to analyze the influence of resource allocation on student performance, particularly in the context of the Michigan Student Test of Educational Progress (MSTEP) scores. The data spanned the years 2015-2017.

Smart's (2019) findings reveal a statistically significant difference in the performance of students in English language arts and math proficiency between charter public schools and traditional public schools during the 2014-2017 school years. The study also highlights variations in resource allocation practices between the two models. Charter public schools allocate more funds to administration, while traditional schools allocate more to instructional support. Additionally, traditional public schools spend slightly less on operations and maintenance compared to charter public schools. However, these differences in allocation categories were generally not statistically significant, and the overall resource allocation outcome was similar between the two types of schools (Smart, 2019).

In a similar study on funding allocation, both revenue and expenditures Krop and Zimmer (2005) looked at California public schools, focusing on their revenue sources, expenditures, and facility-related issues. The primary purpose is to understand how charter schools manage their financial resources and whether they encounter obstacles in acquiring suitable facilities. Conventional schools in California are funded via two means: “(1) revenue limit funding, which is general purpose money allocated on the basis of average daily attendance (ADA) at a school; and (2) categorical aid, which is generally more restricted funding for particular students or programs and is based on application and eligibility” (Krop & Zimmer, 2005) In contrast, charter schools are funded under the charter school funding model, which is a “block grant funding system that was established to meet the legislative requirement to provide each charter school operational funding equal to total funding received by a school district serving a similar population” (Krop & Zimmer (2005).

The study by Krop and Zimmer. (2005) focused on California's charter schools, with the sample comprising 352 charter schools meeting specific opening and operational

criteria. Findings indicate that charter schools, particularly start-ups, tend to have lower per-pupil spending compared to traditional public schools. This is attributed to reduced revenues from categorical programs and challenges in securing facilities, which entail additional expenses. Charter schools employ various means to secure facilities, including district-provided, commercial leases, and multiple funding sources (Krop & Zimmer, 2005). These insights provide valuable information about the financial and facility-related dynamics of charter schools.

In a deep analysis of the state court challenges related to charter school funding across the United States, with a particular focus on cases where charter schools challenged the constitutionality of state and local funding distribution, Wood (2019) conducted an extensive analysis of state court challenges in charter school funding, arguing that they should have equal access to funding and facilities as traditional public schools with a focus on cases where charter schools contested funding distribution's constitutionality. The study used a legal analysis methodology to evaluate charter schools' arguments and court responses. Findings showed charter schools consistently challenging their funding across states, seeking equitable treatment with traditional public schools. Outcomes varied among courts. Two key observations emerged: unclear charter school legislation needing amendments for clarity and complex interpretation of state constitutional obligations. Courts play a pivotal role in determining the constitutional status of charter schools, with significant implications for future decisions (Wood, 2019).

Additionally, a survey of school finance in light of inequitable educational facilities in Texas by Rivera and Lopez (2019) looks at inequitable school facilities investments on children from low-income families and communities of color in Texas. Rivera and Lopez (2019) conducted a comprehensive examination of inequitable educational facilities investment in Texas and its impact on children from marginalized

backgrounds. Their research focused on assessing the disparities in state and local investments in educational facilities and their implications for facility quality and equity. Employing a mixed-methods approach, the study involved both quantitative analysis of educational facilities investment data across 12 San Antonio area school districts and qualitative interviews with key stakeholders, including school district leaders and finance experts (Rivera & Lopez, 2019). The research revealed substantial disparities in educational facilities investment across districts, with even economically disadvantaged districts struggling to raise sufficient funds per student despite higher tax efforts (Rivera & Lopez, 2019). Stakeholder interviews highlighted the widespread perception of inadequacy and inequity in state policies and funding for educational facilities, underlining the urgent need for policy improvements in this realm (Rivera & Lopez, 2019).

A case study by Lager (2019) explored the establishment process of Ki Charter Academy, a specialized charter school in Texas catering to children and adolescents in residential facilities. Lager (2019) used a qualitative case study approach, involving interviews and focus group discussions with four founders and two board members, all within a social constructivist theoretical framework. This research provided insights into the challenges encountered during the school's establishment, including bureaucratic obstacles, a demanding application process, and communication issues. Notably, the study highlighted the significance of careful planning and alignment with the school's mission, vision, and strategic goals in securing charter approval, offering valuable insights into the complexities of establishing specialized charter schools (Lager, 2019).

Moreover, Lager's (2019) study shed light on the resource challenges faced by charter schools, particularly in securing facilities and personnel. It underscored the historical disparities in resource allocation between traditional public schools and charter

schools, emphasizing the difficulties charter schools face in obtaining necessary capital facilities due to constraints on accessing long-term bonds funded by local property taxes (Lager, 2019). This resource constraint was found by Lager (2019) to have implications for student success, emphasizing the importance of addressing resource challenges in charter school operations.

In an effort to analyze the securing of charter school facilities, Nowicki (2021), in collaboration with the US Government Accountability Office, explored charter schools' access to public facilities. They aimed to understand the challenges in securing facilities and identify programs that address these challenges. The study involved interviews with state, school district, and charter school officials in California and Colorado, as well as discussions with federal Education officials and other stakeholders. Findings revealed consistent challenges: affordability, facility availability, inconsistent local support, and capacity to manage facilities. While these states offer programs like per-pupil allowances, grants, and use of public facilities, limitations persist in funding and space availability, underscoring ongoing challenges for charter schools in acquiring and maintaining facilities.

Contributing to the facility discussion Huff's case study (2022) delved into the perceptions of secondary charter school science teachers regarding their schools' science programs, focusing on Science Laboratory Classroom Facilities and Science Instructional Materials. Traditional public schools typically have well-funded and customized laboratory classrooms for science instruction, aided by state and local support. In contrast, charter schools often lack secure funding and resort to grants and fundraising for classroom expenses. Furthermore, some charter schools do not qualify for tax-exemption status, raising their facility costs. Charter school survey data indicated that, on average,

charter schools spent around 12% of their total budget on facilities. The types of buildings used by charter schools vary widely (Huff, 2022).

Huff's (2022) research also involved a survey and interviews with secondary charter school science teachers. The findings revealed that many of these teachers faced inadequate facilities for science laboratory instruction and lacked essential laboratory and safety equipment. The researcher suggested that charter school science programs could benefit from increased funding for laboratories, equipment, safety resources, and involving science teachers in program and facility planning (Huff, 2022). These implications are particularly significant as the number of students attending charter schools is on the rise. Science education is crucial for students to develop critical thinking skills and engage in scientific practices (Huff, 2022).

In another study focusing on operation expenses by Childs and Taylor (2022), studied how charter schools in Texas utilized their operational budgets to compete online with traditional public schools. Childs and Taylor (2022) conducted a state-level case analysis using data from the Texas Education Agency and other sources to explore online spending patterns. The researchers found that all types of school districts in Texas allocated a substantial monthly budget, around \$22,314, for search results placement and web advertising. Despite this, Public Charter Schools were less popular online than traditional public school districts (TPSs) in Texas, but they spent more on driving internet traffic to their websites. Only rural school districts were less popular online than TPCSs (Childs & Taylor, 2022)

### **The Superintendent Role**

When analyzing the role of the superintendent, a study by Gawlik and Allen (2020) examines the role of superintendents, with a specific focus on charter school district superintendents and their influence on organizational factors within charter school

districts. Employing a qualitative case study approach, the research investigates how district principals and board members perceive the superintendent's leadership, particularly in shaping a school's mission, principal decision-making, and school board involvement (Gawlik & Allen, 2020). Especially, three key themes emerged: the superintendent's role in defining the district's mission, their function as an instructional leader, and their capacity as a policy entrepreneur (Gawlik & Allen, 2020). The study underscores that the superintendent's mission to establish the district as an autonomous entity, including the creation of a Local Education Agency (LEA), substantially affects the district's mission, instructional effectiveness, and overall objectives as perceived by stakeholders (Gawlik & Allen, 2020).

When examining factors that are influencing the role of the superintendent, Jochim et al. (2023) navigate the political tensions over schooling. Jochim et al. (2023) explored how superintendents are adapting to evolving political tensions in the education sector. Traditionally, they've faced political conflicts, but since the onset of the Covid-19 pandemic, these have extended from safety disputes to matters of race, gender, and identity. By fall 2022, about half of district leaders, especially in majority-white districts, reported political polarization impeding effective education. The research, based on a 2022 survey from the American School District Panel, reveals that these disputes disrupt instruction and endanger educators' safety. Superintendents have also cited politics as a top reason for contemplating leaving the profession, a significant trend amidst declining educator morale post-pandemic (Jochim et al., 2023).

Additionally, Doyle et al. (2019), focus on leaders of color in charter schools, exploring how their experiences and racial identities influence their educational practices. They argue that a leader's identity shapes their approach and can inspire innovative practices (Doyle et al., 2019). The study employs a qualitative case study approach and



profiles three leaders who actively engage families in their children's education. Findings indicate that these leadership practices have a positive impact on student achievement, equity, and organizational culture, with specific examples like Hispanic students outperforming peers in various subjects (Doyle et al., 2019).

A study by Sampson (2018) examines the experiences of Texas female superintendents with long tenures in their positions, aiming to understand the factors contributing to their job longevity. Qualitative research methods were employed, with interviews conducted with five female superintendents who had worked for at least six years in one school district (Sampson, 2018). The researcher identified several key factors contributing to the longevity of female superintendents, including strong working relationships with school boards, solid connections with their communities, a deep commitment and passion for their positions, and a sense of achievement. Additionally, salary considerations were a factor for some, and some superintendents emphasized the importance of meeting students' needs (Sampson, 2018). The researcher also highlighted the significance of school board relations, with two superintendents successfully improving challenging relationships over time (Sampson, 2018).

Machell and Evans's (2019) research serves the purpose of yielding comprehensive data regarding school districts and superintendent salaries in Oklahoma, with the overarching goal of initiating meaningful dialogues among state leaders and stakeholders. The objective of Machell and Evan (2019) is to catalyze discussions around cost-saving measures, ultimately aiming to redirect financial resources towards classrooms. Acknowledging the significant responsibilities and the demanding nature of superintendents' roles, this research emphasizes the importance of their work within the educational landscape (Machell & Evan, 2019). The population under consideration encompasses school districts and superintendents in Oklahoma; the research's findings

reveal that numerous small and very small school districts in Oklahoma compensate their superintendents with comparatively high salaries, even when contrasted with the earnings of other community members landscape (Machell & Evan, 2019).

Importantly, the study clarifies that its intent is not to criticize superintendents or belittle the importance of their roles. Instead, it advocates for the consolidation of school districts in Oklahoma to a total of 200 with an average enrollment of 3,465 students and superintendent salaries averaging \$150,000 landscape (Machell & Evan, 2019). This restructuring could yield substantial cost savings, which could subsequently be reinvested in classrooms and support for educators (Machell & Evan, 2019).

Trying to understand superintendent turnover, a study by Grissom and Mitani (2016), uses longitudinal data from Missouri and panel methods to explore factors influencing superintendent turnover, including salary and district performance. The study models turnover probability based on superintendent and district characteristics (Grissom & Mitani, 2016). It distinguishes types of turnover, including moves to other superintendent positions and exits from the education system. The findings reveal that district characteristics, such as size and student demographics, initially predict turnover, but this effect disappears when district-fixed effects are considered (Grissom & Mitani, 2016). Lower-performing districts experience higher turnover, with some unexpected nonlinear patterns. Superintendent salary strongly predicts turnover, even after accounting for district and superintendent fixed effects. Higher-paid superintendents are more likely to stay, particularly in high-performing districts (Grissom & Mitani, 2016). Transitions to new superintendent positions are linked to salary increases and changes in district attributes. Increasing superintendent salaries may be an effective strategy for retention, especially in smaller and lower-performing districts, where superintendents are

more likely to seek higher-paying positions in larger, high-performing, urban districts (Grissom & Mitani, 2016).

In a study by Hayes (2020), the focus is also on school district superintendents' salaries, who are akin to other public sector chief executives, sharing similar responsibilities such as setting strategic goals, managing resources, and creating a supportive environment for employees and clients. Superintendent turnover in school districts can have adverse effects, including reduced student achievement, decreased staff morale, diminished community support, increased recruitment costs, and disruptions to district reforms. Understanding the factors contributing to superintendent turnover is crucial for policymakers and public administration scholars.

The study reveals that a \$10,000 reduction in base salary due to New Jersey Superintendent Salary Cap (NJSSC) corresponds to a 4.0 percentage point increase in the likelihood of superintendent turnover, especially in school districts with expiring contracts. However, it is important to note that not all districts respond the same way, and further analysis shows that, on average, a \$10,000 salary reduction leads to a 16 percent increase in superintendent turnover. This effect is most pronounced in districts with female superintendents, in non-southern regions, and in lower socioeconomic status (SES) communities. The study sheds light on the impact of the NJSSC on public employee turnover and highlights variations in its effects based on superintendent gender, regional location, and community socio-economic status.

Thomas et al. (2022) conducted the ninth edition of the Superintendent Salary and Benefits Study, gathering data on school superintendents' demographics, salaries, and benefits. The researchers sent out 6,974 survey invitations to American public school superintendents in late 2021. The report is divided into 11 sections with 101 tables and primarily relies on measures of central tendency for data analysis. The study found that

the average age of superintendents was 52, with most falling within the age groups of 41-50 and 51-60 (Thomas et al., 2022). Approximately 84% of respondents were aged 41-60, and the majority of superintendents identified as male. Salaries were observed to increase with district enrollment, with the median salary across the entire sample being \$147,000 and the mean at \$158,670. Evaluation systems linked to student outcomes were reported by around 41% of superintendents, slightly down from the previous year (Thomas et al., 2022),

Blaha et al. (2023) conducted a hermeneutic phenomenological study to explore the experiences of female school superintendents during salary and compensation negotiations, an area with limited previous research. They conducted 11 semi-structured interviews in the Midwestern US, with each interview lasting 60 minutes and meticulously transcribed and verified. Themes were derived from the interviews to provide detailed insights into women's negotiation experiences (Blaha et al., 2023). The study used purposeful sampling, ensuring that the 11 female participants were all superintendents leading public K-12 school districts. The choice of two rural Midwestern states aimed to fill a gap in research within that demographic (Blaha et al., 2023).

Six key themes emerged from the interviews, including the challenges of being a woman in a male-dominated field, discomfort in negotiating for oneself, the influence of school boards, the significance of experience and salary data, the importance of fairness, and the need for support for female leaders (Blaha et al., 2023). The study recommends creating support networks, mentorship programs, and personal development opportunities for female superintendents and suggests further educating school boards about gender bias and disparities in negotiations (Blaha et al., 2023).

In a study by Milliman and Maranto (2009) on superintendent turnover, the researchers used a time series database to analyze charter school market share and

superintendent tenure in 45 Arizona school districts. They found that school competition was associated with increased superintendent turnover, particularly in districts with lower charter market share (Milliman & Maranto, 2009). A regional and national market for school superintendents could influence this turnover. The authors conclude that losing many students and funding to charter schools may have serious repercussions for district school leadership (Milliman & Maranto, 2009).

### **Summary of Finding**

Multiple studies have explored the impact of charter schools on student achievement and have revealed a nuanced picture of their effects. Chen and Harris (2022) conducted a nationwide analysis, finding that charter schools have a positive influence on student achievement, particularly in math and reading, across diverse student groups. In contrast, Gulosino et al. (2020) indicated that charter schools in high-income suburban areas may not significantly enhance academic achievement. These findings underscore the importance of considering specific contexts and student demographics when assessing charter school performance. Superintendents, especially in charter school districts, play a vital role in shaping district missions, providing instructional leadership, and engaging in policy entrepreneurship (Gawlik & Allen, 2020). The success of these schools depends on various factors, including the superintendent's leadership and their ability to define the district's mission (Gawlik & Allen, 2020).

In terms of financial accountability, charter schools have been the subject of extensive research. DeJarnatt (2012) emphasizes the need for governance and financial standards due to the substantial public funds allocated to charter schools. Kaplan and Owings (2018) express concerns about market-oriented education policies and emphasize the importance of state oversight to ensure financial responsibility. Superintendents in charter schools have a crucial role in maintaining financial accountability and adhering to

governance standards (Gulosino & Ciamarra, 2019). The challenges and complexities surrounding charter school funding, governance, and financial performance necessitate tailored policies and regulations, which superintendents play a significant role in implementing.

An important aspect of charter school operations is their expenses and how they relate to student achievement. Several studies have explored this relationship, revealing various insights. Baker et al. (2012) found differences in spending levels between charter and district schools, with some charter networks outspending traditional schools in specific regions. The allocation of resources, particularly administrative expenses in charter systems, has also been studied (Kramer et al., 2017). Furthermore, teacher retention and compensation in charter schools have been identified as critical factors impacting school quality (Barrett et al., 2020, 2022). Superintendents are instrumental in making decisions about resource allocation, teacher retention, and ensuring that expenses are aligned with student achievement goals (Buerger, 2020; Carpenter, 2013).

Facility operations and their impact on student achievement have been another focal point of research. The allocation of resources within charter schools and policy issues related to charter schools have been explored (Dallavis & Berends, 2023; Kho et al., 2020). Additionally, studies have assessed the implications of state court challenges related to charter school funding (Wood, 2019) and the impact of resource disparities between charter and traditional schools (Lager, 2019). Ensuring equitable access to educational facilities and addressing resource disparities are crucial considerations in the charter school landscape. Superintendents, particularly in charter school districts, play a critical role in facility operations and resource allocation, ensuring that facilities contribute to positive student outcomes (Lager, 2019; Nowicki, 2021). In summary, research on charter schools covers the impacts on financial accountability, expenses, and

facility operations in diverse educational contexts, with superintendents holding significant responsibilities in each of these areas.

### **Theoretical Framework**

The structure of this study was grounded within the Resource-Based View (RBV) theory, originally introduced by Wernerfelt (1984) and later refined by Barney in 1991 (Barbey, 2001). The relationship between resources and performance within the Resource-Based View (RBV) theory is an influential perspective in the field of strategic management and organizational theory. The resource-based perspective on organizations (RBV) stands out as one of the most effective and fruitful theoretical frameworks within the realm of strategic management (Davis & DeWitt, 2021), the RBV theory focuses on how an organization's unique resources and capabilities can contribute to its competitive advantage and sustained superior performance (Huang & Lee, 2012). When looking at the Texas public charter schools, RBV can be applied by examining how funding allocations represent critical resources and how these resources are strategically managed and leveraged to enhance student achievement. The resource-based view perspective regards the organization as a collection of resources closely associated with its functioning, where these resources play a central role in shaping the selection of strategies and overall performance (Huang & Lee, 2012).

The RBV provides a lens through which allocation funds such as administrative cost ratio, personnel expenses, and superintendent salary can be analyzed to determine how the utilization of resources in The Texas public charter schools affects their educational outcomes, such as student achievement. Resource-based theory, as elaborated upon in and following the 1991 publication, offers a straightforward perspective on the linkage between a company's resources and the strategies it adopts (Barney, 2001). Jay Barney frequently emphasizes that within the realm of scholarly research in strategic

management, there exists a common focal point: the performance of organizations, specifically, what sets apart organizations that consistently outperform their counterparts. The concept of strategy is all-encompassing, allowing for the incorporation of nearly any factor on the independent side of the statistical equation as long as you can explain the impact on performance (Davis & DeWitt, 2021).

As the study focused on Texas public charter schools' funding allocations and student achievement, it posits that funding allocations represent vital resources. The study explored how these resources are strategically managed and harnessed to enhance student achievement. By viewing the Texas public charter schools as a collection of resources intricately linked to their functioning, this approach recognizes that effective resource utilization plays a central role in shaping the selection of strategies and overall performance. This study, anchored in the RBV theory, provides a comprehensive lens through which allocation funds, including administrative cost ratio, personnel expenses, and superintendent salary, can be scrutinized to reveal their impact on educational outcomes. In line with the RBV theory, it addresses the core question of what sets apart organizations such as Texas public charter schools that consistently outperform their counterparts, with a particular focus on the performance of student achievement through strategic resource allocation. This theoretical tool creates the focal foundation of this study.

### **Conclusion**

This chapter offered a thorough review of applicable literature relevant to the purpose of this study, which evaluated the relationship between Texas public Charter school allocation and student achievement in financial accountability, administrative cost ratio, payroll expenses, facility maintenance and operations, and superintendent salary. Chapter III offers the methodology of this research study and included the



operationalization of theoretical constructs, research purpose and questions, research design, population and sample selection, data collection procedures, data analysis techniques, privacy and ethical considerations, and research design limitations.

### CHAPTER III: METHODOLOGY

The purpose of this study was to examine the relationship between public charter school funding allocation on student achievement. This mixed-methods study included archived data downloaded from the Texas Education Agency's (TEA) Financial Integrity Rating System of Texas (FIRST) Public Education Information Management System (PEIMS) and Texas Academic Performance Reports (TAPR) from a purposeful sample of active open enrollment public charter schools in the State of Texas. The quantitative data was analyzed using descriptive statistics and Pearson's product-moment correlations ( $r$ ). At the same time, an inductive coding process was implemented to analyze the data obtained from a purposive sample of superintendents' interview transcripts. This chapter presents an overview of the research problem, operationalization of theoretical constructs, research purpose and questions, research design, population and sampling selection, participant selection, instrumentation to be used, data collection procedures, data analysis, validity, privacy, and ethical considerations, and the research design limitations of the study.

#### **Overview of Research Problem**

In 1991, Minnesota introduced the first charter school aiming to enhance the public school system's competitiveness following the release of the "A Nation at Risk" report (Wohlstetter et al., 2015). Traditional public schools had limited experience with competition for student enrollment until then (Gallo, 2014). The charter school movement reached Texas in 1995 through the 74th legislature, which authorized the State Board of Education (SBOE) to establish open-enrollment public charter schools in the state (TEA, 2011). These Texas Public Charter Schools (TPCS) operate as independent local education agencies, distinct from traditional public school (TPS) districts,

monitored and accredited under the statewide testing and accountability system. Texas Public Charter Schools may manage multiple campuses and do not charge tuition, yet they differ from traditional districts in terms of operating in multiple metropolitan areas, serving specific grade levels, and imposing enrollment limits.

Research on charter schools has sparked a national debate on their effectiveness compared to traditional public schools (Barden & Lassmann, 2016; Davallis & Berends, 2023). However, this debate often overlooks the intricate budgetary operations within public charter schools, which can vary significantly (Gallo, 2014). Charter schools emerged in the early 1990s as an alternative for students facing challenges in traditional public schools, offering autonomy over resources, curriculum, and personnel decisions to enhance accountability and effectiveness (Buerger, 2020; Nava, 2019).

Despite comparisons between public charter schools and traditional public schools, there is limited exploration of the different budgetary allocations within charter schools. Additionally, funding allocation challenges, such as the lack of facility funding, have raised concerns in charter schools (Gleason, 2017; Wood, 2019). To address these issues, this study delves into the diverse budgetary operations within public charter schools, specifically in Texas, and investigates their potential impact on student achievement. Given all the debate around charter schools, it is necessary to look deeper at the various operating systems within public charter schools and determine the relationship between public charter school funding allocation on student achievement.

### **Operationalization of Theoretical Constructs**

The study consisted of the following constructs: (a) student achievement, (b) financial accountability, (c) administrative cost ratio, (d) payroll expenditures, (e) facility maintenance and operations, and (f) superintendent salary. Student achievement is defined as the acquisition of knowledge, skills, and attitudes essential for equipping

students to navigate and lead successful lives (Education Evolving, 2016). Student achievement was measured by the percentage of all students who meet grade level or above in the State of Texas Assessment of Academic Readiness (STAAR).

Financial accountability is defined as schools being accountable for the quality of their financial management practices (TEA, 2013). Financial accountability was measured by the overall score on Charter FIRST (Financial Integrity Rating System of Texas) out of 100 points. The administrative cost ratio is defined as the administrative expenses divided by all other expenses. The administrative cost ratio was measured from 0 to 10 points based on the average daily attendance thresholds provided by Charter FIRST. The payroll expenses comprise the total compensation, including salaries, wages, and employee benefit expenses of all TPCS employees. The payroll expenses was measured by the financial data object code on payroll cost.

The facility maintenance and operations expenditures are defined as costs for non-student-based school district support services that do not directly support students. The administrative cost ratio was measured by financial data by function. The superintendent's salary is defined by the amount that a charter school pays its superintendent. The superintendent's salary was measured by financial data under payroll cost and organization code.

### **Research Purpose, Questions, and Hypothesis**

The purpose of this study was to examine the relationship between public charter school funding allocation on student achievement. The following research questions guided the study:

R1: Is there a relationship between the financial accountability rating and student achievement within small, medium, and large charter schools?

Ha: There is a relationship between the FIRST rating and student achievement.

R2: Is there a relationship between the administrative cost ratio and student achievement within small, medium, and large charter schools?

Ha: There is a relationship between the administrative cost ratio and student achievement.

R3: Is there a relationship between personnel expenses and student achievement within small, medium, and large charter schools?

Ha: There is a relationship between personnel expenses and student achievement.

R4: Is there a relationship between facilities maintenance and operations and student achievement within small, medium, and large charter schools?

Ha: There is a relationship between personnel expenses and student achievement.

R5: Is there a relationship between the superintendent's salary and student achievement within small, medium, and large charter schools?

Ha: There is a relationship between the superintendent's salary and student achievement.

R6: What are the superintendent's perceptions concerning the impact of public charter school funding allocations on student achievement?

### **Research Design**

The research design for this study was a sequential mixed methods approach (QUAN→qual). This design consisted of two phases: first, a quantitative phase, and second, a qualitative one. The significant advantage of this design is that it allows for a more in-depth examination of the quantitative results by combining the qualitative phase. For the quantitative analysis, a purposeful sample of active public charter schools in the State of Texas were selected for this study. Archived data collected in this study was analyzed using descriptive statistics and Pearson's product-moment correlations ( $r$ ). For

the qualitative analysis, data obtained from the superintendent interview transcripts was analyzed using an inductive coding process.

### **Context**

Texas is one of the largest states in the U.S., and among the five states having the most significant number of charter schools with Texas Public Charter Schools serve around 375,000 students (TEA, 2022). Charter school supporters maintain that traditional school districts lack the incentive to provide education effectively because their structures and processes are too political and bureaucratic (Buerger, 2020). As a charter school administrator of over 15 years, I want to study the financial structures of the TPCS to analyze the impact of public charter school funding investments on student achievement. Expanded autonomy over resources and curriculum and more accountability pressure generated by school choice (Nathan, 1996) is why advocates expect public charter schools to be more effective than traditional public schools. Charter schools are publicly funded non-governmental organizations operating their particular system, operations and curriculum, and personnel choices (Buerger, 2020). The research on whether charter schools offer a better academic outcome than traditional public schools provide is divided, as some students enrolled in charter schools perform better on standardized tests while others do not (Barden & Lassmann, 2016).

The focus of the study was selected on charter schools only because the comparison with Traditional ISDs has been done in many ways already. My study aims to learn about the different financial structures to understand better the impact of public charter school funding investments on student achievement. As a central office administrator with experience in budgeting and charter operations, I can conduct in-depth interviews with superintendents regarding their funding investment and student achievement. I conducted a phenomenology approach as I interview Charter

superintendents and analyze the issues to develop themes to learn about the impact on student achievement.

### **Population and Sample**

The population of the study consists of all Texas public charter schools. The state of Texas is comprised of 185 Texas public charter school systems with 377,375 students. Hispanic students accounted for the largest percentage of total enrollment in Texas charter schools (62.8%), followed by African American (17.3%), White (12.3%), Asian (4.9%), and multiracial (2.3%) students. The Texas Public Charter Schools serve 71.2% economically disadvantaged students, 54.8% at risk, 30.4% emergent bilingual, and 8.4% special education. A purposeful sample of Texas public charter schools will be utilized for this study. Table 3.1 shows the growth of Texas Public Charter Schools from 1996-1997 to 2021-2022 (TEA, 2022).

Table 3.2 lists that based on the 2021-2022 data the Charter FIRST had 73.0% of TPCS with a superior rating, 17.2% with an Above standard rating, 8.1% with a meets standard rating, and 1.7% with a substandard achievement rating (TEA, 2022). Texas Public Charter School employs 64.6% minority staff, and 2.0% of the staff are central office administrators with an average salary of \$96,684 TPCS staff data in Table 3.3. Teachers in TPCS, Table 3.4, are primarily White (39.4%), Hispanic (34.0%), and African American (20.6%) (TEA, 2021). A purposeful sample of Texas public charter schools was utilized for this study.

**Table 3.1:**  
*Students in Texas Public Charter Schools, 2017-2022*

Year	Number	Annual change (%)	Representation in public school enrollment (%)
2017-18	296,323	8.6	5.5
2018-19	316,869	6.9	5.8
2019-20	336,900	6.3	6.1
2020-21	365,930	8.6	6.8
2021-22	377,375	3.1	7.0

**Table 3.2:**  
*2022-2023 Charter FIRST Rating (Based on 2021-2022 Data)*

Ratings	Count	% Total	Enrollment	% Total Enrollment
A - Superior Achievement	127	73.0	310,297	83.53
B - Above Standard Achievement	30	17.2	49,166	13.24
C - Meets Standard Achievement	14	8.1	11,059	2.98
F - Substandard Achievement	3	1.7	937	0.25
<b>TOTAL</b>	<b>174</b>	<b>100.0</b>	<b>371,459</b>	<b>100.00</b>



**Table 3.3:**  
*2021-2022 PEIMS Staff Data*

Staff	Charters	Districts	Texas
Total Staff FTE	40,882	704,434	745,316
Total Teacher FTE	21,378	348,017	369,395
% Central Administration	2.0%	1.1%	1.2%
% Campus Administration	5.1%	2.9%	3.0%
% Professional Support Staff	13.3%	10.4%	10.6%
% Teachers	52.3%	49.4%	49.6%
% Educational Aides	10.8%	10.6%	10.6%
% Auxiliary Staff	16.4%	25.6%	25.1%
Average Central Administrative Salary	\$96,684	\$111,006	\$109,662
Average Campus Administrative Salary	\$76,852	\$84,102	\$83,424
Average Professional Support Staff Salary	\$61,302	\$68,529	\$68,030
Average Teacher Salary	\$53,132	\$57,918	\$57,641
% Minority	64.6%	50.8%	51.5%
Number of Students Per Total Staff	8.9	7.1	7.2
Number of Students Per Teacher	17.1	14.3	14.5

**Table 3.4:**  
*2021-2022 PEIMS Teacher Data*

Teachers	Charters	Districts	Texas
% With 5 or Fewer Years of Experience	63.2%	32.8%	34.6%
Average Years of Experience	5.9	11.5	11.2
% With Advanced Degrees	24.0%	25.9%	25.8%
Teacher Turnover Rate	23.1%	13.8%	14.3%
% African American	20.6%	10.6%	11.1%
% Hispanic	34.0%	28.1%	28.4%
% White	39.4%	58.0%	56.9%
% American Indian			0.3%
% Asian			1.8%
% Pacific Islander			0.2%
% Two or More Races			1.2%
% Regular Education	84.1%	70.2%	71.0%
% Special Education	5.7%	9.7%	9.4%
% Compensatory Education	0.8%	2.9%	2.8%
% Bilingual/ESL Education	6.1%	6.2%	6.2%
% Career & Technical Education	2.7%	5.3%	5.1%
% Other Education (Includes G & T)	0.7%	5.7%	5.4%

### **Participant Selection**

A purposeful sample of public charter school superintendents was solicited to participate in a 30-minute semi-structured interview. The superintendents are selected to give their perspectives on the impact of public charter school funding investments on student achievement. The researcher had no relationship with the participants. The

superintendents were contacted via phone and email, soliciting their participation in the interview process. The aim was to have a total of nine active superintendents participate, three from each type, small, medium, and large TPCS. If there is a lack of response, the interviews were open to any public charter school superintendent willing to participate. Those superintendents who volunteered to participate in the interview process were asked to consent to the interview before data collection. The consent form details the purpose of the study; stating that their participation was voluntary, and it assured them that their identities would remain confidential, and provide details of the interview process (see Appendix A)

### **Instrumentation**

The *State of Texas Assessments of Academic Readiness* is the Texas state assessment to measure academic readiness (TEA, 2021). Every year, Texas conducts an academic achievement examination to evaluate the knowledge and competencies of all students. The STAAR test establishes an annual benchmark to assess whether a student has approached a passing level, met the standards, or exceeded them. A scale is applied throughout Texas to ensure fairness in evaluation for all students. These standards are derived from the Texas Essential Knowledge and Skills (TEKS), which represents the state's curriculum guidelines. Students start taking the STAAR assessment in the third grade and continue annually until the 11th grade. In elementary school, the subjects tested include Reading, Math, and Science. Middle school students are evaluated in Reading, Math, Science, and Social Studies, while high school students are assessed in English I, English II, Algebra I, Biology, and U.S. History.

The STAAR test was implemented in the spring of 2012. It consists of assessments including reading and mathematics in grades 3-8, writing in grades 4 and 7, science in grades 5 and 8, social studies in grade 8, and end-of-course (EOC) assessments

for Algebra I, English I, English II, Biology, and U.S. History. The STAAR measures if a student has met specific knowledge or a core subject at the grade level tested and is ready to enter the next grade level (TEA, 2021). Each STAAR assessment is based on the Texas Essential Knowledge and Skills (TEKS), the state-mandated curriculum (TEA, 2010). The STAAR test validity for all students in all subjects is 9.03 KZH. The curriculum and standards taught to students contain specific knowledge and skills necessary to progress from year to year. The STAAR assessments test students' abilities based on the curriculum taught within a specific academic year.

In order to ensure the validity and reliability of the STAAR test, the Texas Education Agency (TEA) partnered with the Human Resources Research Organization (HumRRO) to conduct an external assessment of 3rd to 8th grade STAAR scores and results (HumRRO, 2016). This evaluation aimed to determine the alignment between the test content and the cognitive processes intended by TEA. During this comprehensive review, each HumRRO reviewer assigned a rating to each test item, categorizing them as "fully aligned," "partially aligned," or "not aligned." The "fully aligned" rating indicated that an item met all expectations, while "partially aligned" was assigned when some aspects of the content aligned with expectations, but others did not. "Not aligned" was used when the item content significantly deviated from the expected standards. The results of this evaluation revealed the average percentages of items rated as "fully aligned" for 3rd to 8th grade students in various subjects, including Math (third grade – 97.8%, fourth grade – 96.5%, fifth grade – 98.5%, sixth grade - 97.4%, seventh grade - 98.8%, and eighth grade - 97.8%), Reading (third grade – 86.2%, fourth grade – 91.5%, fifth grade – 88.6%, sixth grade - 95.8%, seventh grade - 90.5%, and eighth grade - 96.6%), Science (fifth grade – 98.3%, eighth grade - 97.7%), Social Studies (eighth grade - 89.9%), and Writing (seventh grade - 88.7%); (HumRRO, 2016).

The reliability of the STAAR EOC in high school grades was assessed through the repeated administration of the same test to ensure consistent outcomes. Two different methods were employed to evaluate internal consistency. The reliability of multiple-choice and gridded-response questions was gauged using the Kuder-Richardson 20 (KR-20) method, while open-ended response questions were assessed with the stratified coefficient alpha. The reliability scores for the STAAR EOC exams ranged from 0.87 to 0.94. A reliability score of 0.90 or higher was deemed excellent, while a score between 0.80 and 0.89 was considered good, and a score between 0.70 and 0.79 was seen as adequate (TEA, 2016). This study will utilize the aggregate scores of all students in all subjects at the "meet" level to determine academic achievement.

### **Data Collection Procedures**

#### **Quantitative**

Before any data was collected, the researcher gained approval from the University of Houston-Clear Lake's (UHCL) Committee for Protection of Human Subjects (CPHS). All data collected was uploaded to IBM SPSS for analysis. Data was collected from the Texas Education Agency (TEA): (a) Texas Academic Performance Reports (TAPR), (b) Financial Integrity Rating System of Texas (FIRST), and (c) Public Education Information Management System (PEIMS). In 2017, established by House Bill 22, the A-F accountability was introduced and over the course of five years, spanning from the 2017-2018 academic year to the 2021-2022 academic year, maintained unaltered cutoff points for assessing school performance; the cutoff points were refreshed starting with the 2022-2023 school year (TEA, 2023). The study used the period, 2018-2022, when the cutoff points remained constant, offering an opportunity to analyze the average performance of schools over this five-year span except for 2019-2020 student achievement data not being available due to the COVID-19 pandemic.

## **Qualitative**

A purposeful sample of superintendents was solicited from the participating public charter schools for a semi-structured interview. The name of the school district and the names of the participants were not mentioned in the study. Interview participants received an informed consent form via e-mail describing the study's purpose, estimated length of each interview, disclosure that the interviews were recorded and transcribed, and assurance that participation was voluntary, participants can stop at any time, and the data collected remains confidential. The interview questions asked the superintendents to discuss their perceptions concerning the impact of public charter school funding investments on student achievement. Appendix B provides the Interview Guide listing the interview questions. The interviews were about 30 minutes in length. The participants were asked about their budgeting process, how they make financial decisions, budget successes and failures, and impact on student achievement. All sessions were audio-taped and transcribed. After each interview had been transcribed, the transcript was e-mailed back to the participant so he or she could make corrections and/or clarifications to the data. Data collected was stored in two locations, the researcher's computer hard drives and on a memory stick. It will be maintained confidentially for five years following the conclusion of the research before it is destroyed.

## **Data Analysis**

### **Quantitative**

All data collected was uploaded to IBM SPSS for analysis. To answer research questions one through five, descriptive statistics and Pearson's product-moment correlations ( $r$ ) were conducted to examine whether there were any relationships between student achievement and: (a) overall FIRST rating, (b) administrative cost ratio, and (c) payroll expenses, (d) facility maintenance and operations, and (e) superintendent salary.

Given that all of the variables listed are continuous in measurement, a Pearson's product-moment correlations ( $r$ ) statistical analysis is deemed appropriate. For statistically significant relationships, the effect size was measured by calculating the coefficient of determination ( $r^2$ ) to determine the proportion of variance in the dependent variable that could be attributed to the independent variable. A significance value of .05 was used to separate the most unlikely (or extreme) 5% of the sample means from the most likely 95% of the sample means (Gravetter & Wallnau, 2008).

### **Qualitative**

Simultaneously with the quantitative data findings, superintendent interviews were conducted in an attempt to provide a more in-depth understanding of the potential impact that public charter school funding allocation may have on student achievement. The qualitative data obtained from the interviews was analyzed using an inductive coding process in an attempt to build an empirical understanding of what impact public charter school funding allocation may have on student achievement. The data analysis plan for the superintendent interviews included the search for correspondence and patterns as I tried to understand behaviors, issues, and context (Stake, 1995). Through inductive coding data reduction, the data was reduced to make it simpler and more comprehensible and to draw out significant themes and patterns. This process was accomplished by transcribing the audio recordings of the interviews, organizing the data by identifying reoccurring themes, and translating the data into written summaries. The coding process begun by collapsing codes to discover the appropriate codes; importance was placed on the search for themes and patterns from the key issues of the study (Stake, 1995). The findings were used to draw conclusions.

## **Qualitative Validity**

The use of mixed data, quantitative and qualitative, allowed for the results to be triangulated by cross-validating and corroborating findings within the study. The quantitative and qualitative data were collected concurrently and analyzed afterward. I triangulated the results by looking at similarities and differences in the data and between participants' responses. After each interview was transcribed, the transcripts were subject to member-checking where participants were provided a transcript of their interview to ensure the validity of the dialogue gathered. As I triangulated the results, it is important to point out that I came to this study with my personal experiences and lenses, similar to many researchers. I was an instrument in the data collection, as everything I saw and heard was filtered through my attitudes, inclinations, and experiences. For example, one of my biases was that I am a proponent of school choice, and I believe that families should not be subject to attending their neighborhood schools only.

My subjectivity, a necessary interpretive part of my research methods, served as a lens through which my observations and interpretations flowed; I remained cognizant of how my subjectivity may create methodological concerns. I pursued reducing these concerns by continually questioning the assumptions I brought with me to this research. I pay particularly close attention when something surprises me. This reflexivity helped me make my subjective assumptions more transparent.

I have no personal or professional relationship with the study's participants. I also ensured that the participants' voices were represented accurately. Therefore, member checking was used to ensure the validity of the findings. After each interview was transcribed, the transcript was e-mailed back to the participant so he or she could make corrections and clarifications to the data if needed (Stake, 1995). The interviewees were



multiple superintendents of public charter schools with high connoisseurship in the area of funding.

### **Privacy and Ethical Considerations**

Before collecting any data, the researcher gained approval from UHCL's CPHS and the school districts where the study took place. Superintendent emails were obtained through a Public Information Request through the Texas Education Agency. The name of the school district and the names of the participants are not mentioned in the study. Interview participants received an informed consent form via e-mail describing the study's purpose, estimated length of each interview, disclosure that the interviews were recorded and transcribed, and assurance that participation is voluntary, participants can stop at any time, and the data collected remains confidential. The researcher used methods, such as assigning pseudonyms, to protect confidentiality during the qualitative component of the study. The data file and survey notes are stored on the researcher's computer in a password-protected file and in the researcher's office within a locked file cabinet. The researcher will maintain the data for five years and then destroy it.

### **Limitations of the Study**

The research design consists of several limitations. First, the researcher focused on STAAR data to measure student achievement. However, the STAAR has limitations for measuring student achievement. Secondly, the financial data is based on the financial PEIMS coding at each public charter school, so human error in the accounting coding and entering PEIMS data is likely. The researcher cannot control the inaccuracy of data entry or data reporting. As a result, such errors could jeopardize the validity of the findings. Third, the researcher depended upon the interview participants' honest feedback to effectively conclude the themes of the interviews. Fourth, if the interview subjects are not honest in their answers, the qualitative data would be skewed and, thus, not valid. Fifth,

the tendency towards political correctness versus the offering of candid answers by the interviewees could threaten the validity of the findings. Sixth, the researcher utilized a five-year dataset for this study. To achieve this, charter schools that have been recently closed or newly opened were excluded from the sample, thereby excluding some dataset for analysis. Finally, the sample size was limited to one state since all the public charter schools are located in Texas. The study's findings are not generalizable to other states beyond Texas. A multi-state analysis should be done to understand better the impact of public charter school funding investments on student achievement.

### **Conclusion**

This study analyzed the impact of public charter school funding investments on student achievement. This chapter in the study provides an overview of the problem, the operationalization of theoretical constructs, the research purpose, questions, hypothesis, and study design. In addition, the population and sample, the data collection procedures, and the data analysis are included. Finally, the privacy, ethical considerations, and research design limitations are presented. This study involved a mixed methods approach to determine the impact of public charter school funding investments on student achievement. This sequential mixed methods approach was utilized to provide more detailed data and a deeper look into the constructs being analyzed. The quantitative data was analyzed using descriptive statistics and Pearson's product-moment correlation ( $r$ ), and the qualitative data in the form of interviews was coded using inductive coding. In Chapter IV, financial data, student achievement data, and interviews were analyzed and discussed in further detail.

## CHAPTER IV:

### RESULTS

This study examined the relationship between public charter school funding allocation and student achievement. Utilizing five years (2018-2022) of the Texas Education Agency (TEA) Charter Financial Integrity Rating System of Texas (e.g., financial accountability and administrative cost ratio), Public Education Information Management System (e.g., payroll expenditures, facility maintenance and operations expenditures, and superintendent salary), and Texas Academic Performance Reports (e.g., student achievement) were downloaded into an IBM SPSS database for purposes of analysis. The quantitative data were analyzed using descriptive statistics and Pearson's product-moment correlations, while the qualitative data obtained from superintendent interviews were analyzed using an inductive coding process. This chapter presents a detailed description of the participating school districts' demographics and the findings of each of the six research questions.

#### **Participant Demographics**

Utilizing the Texas Education Agency (TEA) Texas Academic Performance Reports, a purposeful sample of 185 public charter schools identified as active during the 2021-2022 school year were chosen for participation in this study. After reviewing five years of available data, public charter schools that did not have five years of data due to being new, closed, data not reported, or had data masked due to small sizes were removed from the population. The resulting sample consisted of 142 public charter schools: 54 small, 25 medium, and 63 large. Table 4.1 provides descriptive statistics for the participating public charter schools in terms of the mean of student achievements, financial accountability, and administrative cost ratio. The average student achievement was 41.3%. The average financial accountability score was 91.6%. The average

administrative cost ratio was 8.3 points. Table 4.2 provides descriptive statistics for the participating public charter schools in terms of the mean of personnel expenditures, facilities maintenance and operation expenditures, and superintendent salary. The average personnel expenditure was \$15,202,637.00. The average facility maintenance and operation expenditure was \$3,100,955.00. The average superintendent's salary was \$141,653.74.

**Table 4.1:**  
*Demographic Breakdown of Sample TPCS*

School Year	Student Achievement (Mean)	Financial Accountability (Mean)	Admin Cost Ratio (Mean)
2017-2018	41.1	92.0	8.1
2018-2019	42.5	91.9	8.3
2019-2020	Covid-19	90.3	8.3
2021-2021	32.3	92.0	8.4
2021-2022	49.4	92.2	8.5
Average	41.3	91.6	8.3

**Table 4.2:**  
*Expenditures and Superintendent Salary Breakdown of Sample TPCS*

School Year	Personnel Expenditure (Mean)	Facility maintenance and Operations Expenditures (Mean)	Superintendent Salary (Mean)
2017-2018	\$11,109,610.00	\$2,198,318.00	\$129,728.82
2018-2019	\$13,389,358.00	\$2,756,789.00	\$134,462.92
2019-2020	\$13,743,966.00	\$3,045,956.00	\$144,251.41
2021-2021	\$17,359,593.00	\$3,521,580.00	\$146,657.60
2021-2022	\$20,410,656.00	\$3,982,133.00	\$153,167.96
Average	\$15,202,637.00	\$3,100,955.00	\$141,653.74

## Research Question One

Research question one (*Is there a relationship between the financial accountability and student achievement within small, medium, and large charter schools?*) was answered by descriptive statistics and calculating a Pearson's product-moment correlation ( $r$ ) between accountability rating and STAAR scores for small, medium, and large sized public charter schools. When examining the relationship between financial accountability and student achievement across small, medium, and large TPCS, results indicated that a relationship was not found to exist between financial accountability and student achievement for small, medium, and large school districts ( $p > .05$ ).

### Small Sized TPCS

Table 4.3 displays the demographic characteristics of TPCS financial accountability rating per year and the average respective student achievement rates for small-sized TPCS. The mean financial accountability rating was 89.1% (median = 93.5%). Student achievement rates ranged from 12.5% to 78.3%, reporting an average rate of 39.9%. When examining the relationship between financial accountability and student achievement within small-sized TPCS, findings indicated that a relationship did not exist between financial accountability and student achievement,  $r(54) = .226$ ,  $p = .100$ . This suggests that for small-sized TPCS, financial accountability did not have any bearing on the student achievement.

**Table 4.3:***Small-Sized TPCS: Descriptive Statistics for Financial Accountability and Student Achievement*

School Year	Financial Accountability (%)			Student Achievement STAAR Scores (%)		
	Mean	Median	Standard Deviation	Mean	Median	Standard Deviation
2017-2018	88.74	95.50	0.19	38.61	37.50	16.78
2018-2019	90.13	94.50	0.19	39.80	35.00	16.48
2019-2020	87.15	90.00	0.19	COVID-19	COVID-19	COVID-19
2021-2021	89.67	94.00	0.16	31.74	28.50	16.81
2021-2022	89.65	94.00	0.17	49.46	49.00	18.51
Average	89.07	93.50	0.12	39.90	36.00	15.48

**Medium Sized TPCS**

Table 4.4 displays the demographic characteristics of TPCS financial accountability rating per year and the average respective student achievement rates for medium-sized TPCS. The mean financial accountability rating was 90.9% (median = 93.5%). Student achievement rates ranged from 17.0% to 82.8%, reporting an average rate of 40.4%. When examining the relationship between financial accountability and student achievement within medium-sized TPCS, findings indicated that a relationship did not exist between financial accountability and student achievement,  $r(25) = .332$ ,  $p = .110$ . This suggests that for medium-sized TPCS, financial accountability did not have any bearing on student achievement.

**Table 4.4:**

*Medium-Sized TPCS: Descriptive Statistics for Financial Accountability and Student Achievement*

School Year	Financial Accountability (%)			Student Achievement STAAR Scores (%)		
	Mean	Median	Standard Deviation	Mean	Median	Standard Deviation
2017-2018	90.40	92.00	0.11	40.04	38.00	16.04
2018-2019	90.52	90.00	0.09	40.72	38.00	14.91
2019-2020	90.24	94.00	0.12	COVID-19	COVID-19	COVID-19
2021-2021	90.88	96.00	0.19	32.16	29.00	16.16
2021-2022	92.52	92.00	0.09	48.52	47.00	15.61
Average	90.91	93.50	0.08	40.36	38.25	15.19

### Large Sized TPCS

Table 4.5 displays the demographic characteristics of TPCS financial accountability rating per year and the average respective student achievement rates for large-sized TPCS. The mean financial accountability rating was 94.1% (median = 95.2%). Student achievement rates ranged from 11.0% to 79.8%, reporting an average rate of 42.9%. When examining the relationship between financial accountability and student achievement within large-sized TPCS, findings indicated that a relationship did not exist between financial accountability and student achievement,  $r(63) = .123$ ,  $p = .340$ . This suggests that for large-sized TPCS, financial accountability did not have any bearing on student achievement.

**Table 4.5:**

*Large-Sized TPCS: Descriptive Statistics for Financial Accountability and Student Achievement*

School Year	Financial Accountability (%)			Student Achievement STAAR Scores (%)		
	Mean	Median	Standard Deviation	Mean	Median	Standard Deviation
2017-2018	94.63	96.00	0.07	43.63	43.00	14.94
2018-2019	94.03	96.00	0.08	45.57	46.00	14.64
2019-2020	93.10	95.00	0.07	COVID-19	COVID-19	COVID-19
2021-2021	94.38	96.00	0.08	32.83	30.00	14.13
2021-2022	94.16	96.00	0.07	49.65	48.00	16.31
Average	94.06	95.20	0.05	42.92	41.50	14.61

### **Research Question Two**

Research question two (*Is there a relationship between the administrative cost ratio and student achievement within small, medium, and large charter schools?*) was answered by calculating descriptive statistics and a Pearson's product-moment correlation ( $r$ ) between administrative cost ratio and STAAR scores for small, medium, and large sized public charter schools. When examining the relationship between administrative cost ratio and student achievement across small, medium, and large TPCS, results indicated that there is a statistically significant positive relationship between administrative cost ratio and student achievement for medium-sized TPCS ( $p < .05$ ). A relationship was not found to exist between administrative cost ratio and student achievement for small and large TPCS ( $p > .05$ ).



### Small Sized TPCS

Table 4.6 displays the demographic characteristics of TPCS administrative cost ratio per year and the average respective student achievement rates for small-sized TPCS. The mean financial accountability rating was 8.6 (median = 8.6). Student achievement rates ranged from 12.5% to 78.3%, reporting an average rate of 39.9%. When examining the relationship between financial accountability and student achievement within small-sized TPCS, findings indicated that a relationship did not exist between administrative cost ratio and student achievement,  $r(54) = .108, p = .438$ . This suggests that for small-sized TPCS, the administrative cost ratio did not have any bearing on student achievement.

**Table 4.6:**  
*Small-Sized TPCS: Descriptive Statistics for Administrative Cost Ratio and Student Achievement*

School Year	Administrative Cost Ratio			Student Achievement STAAR Scores (%)		
	Mean	Median	Standard Deviation	Mean	Median	Standard Deviation
2017-2018	7.67	10.00	3.03	38.61	37.50	16.78
2018-2019	7.44	10.00	3.37	39.80	35.00	16.48
2019-2020	7.89	10.00	2.84	COVID-19	COVID-19	COVID-19
2021-2021	8.56	10.00	2.28	31.74	28.50	16.81
2021-2022	8.44	8.00	2.65	49.46	49.00	18.51
Average	8.55	8.60	2.31	39.90	36.00	15.48

### Medium Sized TPCS

Tables 4.7 display the demographic characteristics of TPCS administrative cost ratio year and the average respective student achievement rates for medium-sized TPCS. The mean administrative cost ratio was 7.8 (median = 9.6). Student achievement rates

ranged from 17.9% to 82.8%, reporting an average rate of 40.4%. When examining the relationship between administrative cost ratio and student achievement within medium-sized TPCS, findings indicated that a statistically significant positive relationship existed between administrative cost ratio and student achievement,  $r(25) = .399$ ,  $p = .048$ ,  $r^2 = .16$ . This suggests that for medium-sized TPCS, when more points were received in administrative cost ratio, student achievement rates increased. The proportion of variation in administrative cost ratio attributed to student achievement was 16.0%.

**Table 4.7:**  
*Medium-Sized TPCS: Descriptive Statistics for Administrative Cost Ratio and Student Achievement*

School Year	Administrative Cost Ratio			Student Achievement STAAR Scores (%)		
	Mean	Median	Standard Deviation	Mean	Median	Standard Deviation
2017-2018	7.76	10.00	3.38	40.04	38.00	16.04
2018-2019	8.48	10.00	2.84	40.72	38.00	14.91
2019-2020	8.00	10.00	3.06	COVID-19	COVID-19	COVID-19
2021-2021	7.60	10.00	3.42	32.16	29.00	16.16
2021-2022	8.32	10.00	3.15	48.52	47.00	15.61
Average	7.79	9.60	3.03	40.36	38.25	15.19

### Large Sized TPCS

Table 4.8 displays the demographic characteristics of TPCS administrative cost ratio rating per year and the average respective student achievement rates for large-sized TPCS. The mean administrative cost ratio was 8.3 (median = 10.0) Student achievement rates ranged from 11.0% to 79.8%, reporting an average rate of 42.9%. When examining the relationship between financial accountability and student achievement within large-sized TPCS, findings indicated that a relationship did not exist between administrative

cost ratio and student achievement,  $r(63) = .108, p = .439$ . This suggests that for large-sized TPCS, the administrative cost ratio did not have any bearing on student achievement.

**Table 4.8:**  
*Large-Sized TPCS: Descriptive Statistics for Administrative Cost Ratio and Student Achievement*

School Year	Administrative Cost Ratio			Student Achievement STAAR Scores (%)		
	Mean	Median	Standard Deviation	Mean	Median	Standard Deviation
2017-2018	8.57	10.00	3.01	43.63	43.00	13.30
2018-2019	8.86	10.00	2.82	45.57	46.00	13.11
2019-2020	8.70	10.00	3.09	COVID-19	COVID-19	COVID-19
2021-2021	8.51	10.00	2.87	32.83	31.50	12.99
2021-2022	8.54	10.00	3.22	49.65	48.00	14.46
Average	8.26	10.00	2.34	42.92	36.88	14.61

### Research Question Three

Research question three (*Is there a relationship between the personnel expenditures and student achievement within small, medium, and large charter schools?*) was answered by calculating a descriptive statistics and a Pearson's product-moment correlation ( $r$ ) between the percentage of personnel expedites against the overall budget and STAAR scores for small, medium, and large sized public charter schools. When examining the relationship between personnel expenditures and student achievement across small, medium, and large TPCS, results indicated that there is a statistically significant positive relationship between personnel expenditures and student achievement for medium-sized TPCS ( $p < .05$ ). A relationship was not found to exist between personnel expenditures and student achievement for small and large TPCS ( $p > .05$ ).

### Small Sized TPCS

Tables 4.9 and 4.10 display the demographic characteristics of TPCS personnel expenditures per year and the average respective student achievement rates for small-sized TPCS. The mean personnel expenditures were \$2,123,772.56 (median = \$1,931,371.90), and the mean percentage of personnel expenditures from all funds was 61.7% (median = 63.0%). Student achievement rates ranged from 12.5% to 78.3%, reporting an average rate of 39.9%. When examining the relationship between personnel expenditures and student achievement within small-sized TPCS, findings indicated that a relationship did not exist between personnel expenditures and student achievement,  $r(54) = .101, p = .466$ . This suggests that for small-sized TPCS, the personnel expenditures did not have any bearing on student achievement.

**Table 4.9:**  
*Small-Sized TPCS: Descriptive Statistics for Personnel Expenditures and Student Achievement*

School Year	Personnel Expenditures (\$)			Student Achievement STAAR Scores (%)		
	Mean	Median	Standard Deviation	Mean	Median	Standard Deviation
2017-2018	2,065,136.24	1,884,148.00	1,034,351.34	38.61	37.50	16.78
2018-2019	2,107,487.00	1,891,074.50	994,202.51	39.80	35.00	16.48
2019-2020	1,917,644.63	1,760,758.50	867,508.89	COVID-19	COVID-19	COVID-19
2021-2021	2,183,846.09	2,071,024.50	980,176.74	31.74	28.50	16.81
2021-2022	2,374,748.85	2,221,720.00	1,090,513.78	49.46	49.00	18.51
Average	2,123,772.56	1,931,371.90	952,749.86	39.90	36.00	15.48

**Table 4.10:***Small-Sized TPCS: Descriptive Statistics for Percentage of Personnel Expenditures and Student Achievement*

School Year	Personnel Expenditures (%) of All Funds			Student Achievement STAAR Scores (%)		
	Mean	Median	Standard Deviation	Mean	Median	Standard Deviation
Average	61.70	63.02	8.93	42.92	36.88	14.61

**Medium Sized TPCS**

Tables 4.11 and 4.12 display the demographic characteristics of TPCS personnel expenditures per year and the average respective student achievement rates for medium-sized TPCS. The mean personnel expenditures were \$5,228,133.01 (median = \$4,546,388.00), and the mean percentage of personnel expenditures from all funds of 62.3% (median = 61.1%). Student achievement rates ranged from 17.0% to 82.8%, reporting an average rate of 40.3%. When examining the relationship between personnel expenditures and student achievement within medium-sized TPCS, findings indicated that a statistically significant positive relationship existed between personnel expenditures and student achievement,  $r(25) = .431$ ,  $p = .031$ ,  $r^2 = .186$ . This suggests that for medium-sized TPCS, as personnel expenditures increased so did their student achievement rates. Approximately 19.0% of the student achievement scores can be attributed to personnel expenditures.

**Table 4.11:***Medium-Sized TPCS: Descriptive Statistics for Personnel Expenditures and Student Achievement*

School Year	Personnel Expenditures (\$)			Student Achievement STAAR Scores (%)		
	Mean	Median	Standard Deviation	Mean	Median	Standard Deviation
2017-2018	4,943,729.28	1,884,148.00	1,034,351.34	40.04	38.00	16.04
2018-2019	5,140,000.20	1,891,074.50	994,202.51	40.72	38.00	14.91
2019-2020	4,790,782.88	1,760,758.50	867,508.89	COVID-19	COVID-19	COVID-19
2021-2021	5,454,351.24	2,071,024.50	980,176.74	32.16	29.00	16.16
2021-2022	5,811,801.44	2,221,720.00	1,090,513.78	48.52	47.00	15.61
Average	5,228,133.01	4,546,388.00	1,848,934.75	40.36	36.00	15.19

**Table 4.12:***Medium-Sized TPCS: Descriptive Statistics for Percentage Personnel Expenditures and Student Achievement*

School Year	Personnel Expenditures (%) of All Funds			Student Achievement STAAR Scores (%)		
	Mean	Median	Standard Deviation	Mean	Median	Standard Deviation
Average	62.25	61.06	8.69	42.92	36.88	14.61

**Large Sized TPCS**

Tables 4.13 and 4.14 display the demographic characteristics of TPCS personnel expenditures per year and the average respective student achievement rates for large-sized TPCS. The mean facilities maintenance and operation expenses were \$30,366,084.88 (median = \$11,294,223.80), and the mean percentage of personnel expenditures from all funds was 61.7% (median = 61.1%). Student achievement rates ranged from 11.0% to 79.8%, reporting an average rate of 42.9%. When examining the relationship between personnel expenditures and student achievement within large-sized

TPCS, findings indicated that a relationship did not exist between personnel expenditures and student achievement,  $r(63) = .235, p = .064$ . This suggests that for large-sized TPCS, the personnel expenditures did not have any bearing on student achievement.

**Table 4.13:**  
*Large-Sized TPCS: Descriptive Statistics for Personnel Expenditures and Student Achievement*

School Year	Personnel Expenditures (\$)			Student Achievement STAAR Scores (%)		
	Mean	Median	Standard Deviation	Mean	Median	Standard Deviation
2017-2018	21,308,793.57	10,621,409.00	34,283,251.53	43.63	43.00	13.30
2018-2019	26,333,087.95	10,718,115.00	46,378,114.17	45.57	46.00	13.11
2019-2020	27,433,662.51	10,336,703.00	49,749,124.53	COVID-19	COVID-19	COVID-19
2021-2021	35,091,678.19	12,501,423.00	67,742,223.41	32.83	31.50	12.99
2021-2022	41,663,202.19	13,728,239.00	85,122,320.19	49.65	48.00	14.46
Average	30,366,084.88	11,294,223.80	56,064,045.27	42.92	36.88	14.61

**Table 4.14:**  
*Large-Sized TPCS: Descriptive Statistics for Percentage of Personnel Expenditures and Student Achievement*

School Year	Personnel Expenditures (%) of All Funds			Student Achievement STAAR Scores (%)		
	Mean	Median	Standard Deviation	Mean	Median	Standard Deviation
Average	61.71	61.06	8.95	42.92	36.88	14.61

### **Research Question Four**

Research question four (*Is there a relationship between the facilities maintenance and operation expenses and student achievement within small, medium, and large charter schools?*) was answered by calculating descriptive statistics and a Pearson's product-moment correlation ( $r$ ) between the percentage of facilities maintenance and operation expenses against the overall budget and STAAR scores for small, medium, and large sized public charter schools. When examining the relationship between facilities maintenance and operation expenses and student achievement across small, medium, and large TPCS, results indicated that a relationship was not found to exist between facilities maintenance and operation expenses and student achievement for small, medium, and large school districts ( $p > .05$ )

#### **Small Sized TPCS**

Tables 4.15 and 4.16 display the demographic characteristics of TPCS facilities maintenance and operation expenses per year and the average respective student achievement rates for small-sized TPCS. The mean facilities maintenance and operation expenses were \$500,658.66 (median = \$457,055.50), and the mean percentage of facilities maintenance and operation expenses from all funds was 14.3% (median = 13.3%). Student achievement rates ranged from 12.5% to 78.3%, reporting an average rate of 39.9%. When examining the relationship between facilities maintenance and operation expenses and student achievement within small-sized TPCS, findings indicated that a relationship did not exist between facilities maintenance and operation expenses and student achievement,  $r(54) = .252$ ,  $p = .066$ . This suggests that for small-sized TPCS, the facilities maintenance and operation expenses did not have any bearing on student achievement.



**Table 4.15:**

*Small-Sized TPCS: Descriptive Statistics for Facilities Maintenance and Operation Expenses and Student Achievement*

School Year	Facilities Maintenance and Operation Expenses (\$)			Student Achievement STAAR Scores (%)		
	Mean	Median	Standard Deviation	Mean	Median	Standard Deviation
2017-2018	477,501.35	430,280.50	324,253.48	38.61	37.50	16.78
2018-2019	478,780.44	408,772.50	299,259.79	39.80	35.00	16.48
2019-2020	496,384.96	418,658.00	323,181.20	COVID-19	COVID-19	COVID-19
2021-2021	504,585.33	435,751.50	325,754.44	31.74	28.50	16.81
2021-2022	546,141.20	518,215.50	334,440.77	49.46	49.00	18.51
Average	500,658.66	457,055.50	306,070.84	39.90	36.00	15.48

**Table 4.16:**

*Small-Sized TPCS: Descriptive Statistics for Percentage of Facilities Maintenance of All Funds and Operation Expenses and Student Achievement*

School Year	Facilities Maintenance and Operation Expenses (%) of All Funds			Student Achievement STAAR Scores (%)		
	Mean	Median	Standard Deviation	Mean	Median	Standard Deviation
Average	14.31	13.26	5.65	39.90	36.00	15.48

### Medium Sized TPCS

Tables 4.17 and 4.18 display the demographic characteristics of TPCS facilities maintenance and operation expenses per year and the average respective student achievement rates for medium-sized TPCS. The mean facilities maintenance and operation expenses were \$1,327,718.21 (median = \$1,113,144.40), and the mean

percentage of facilities maintenance and operation expenses from all funds of 16.1% (median=15.0%). Student achievement rates ranged from 17.0% to 82.8%, reporting an average rate of 40.4%. When examining the relationship between facilities maintenance and operation expenses and student achievement within medium-sized TPCS, findings indicated that a relationship did not exist between facilities maintenance and operation expenses and student achievement,  $r(25) = .192, p = .357$ . This suggests that for medium-sized TPCS, the facilities maintenance and operation expenses did not have any bearing on student achievement.

**Table 4.17:**  
*Medium-Sized TPCS: Descriptive Statistics for Facilities Maintenance and Operation Expenses and Student Achievement*

School Year	Facilities Maintenance and Operation Expenses (\$)			Student Achievement STAAR Scores (%)		
	Mean	Median	Standard Deviation	Mean	Median	Standard Deviation
2017-2018	1,237,839.28	955,200.00	829,145.45	40.04	38.00	16.04
2018-2019	1,309,531.88	1,116,470.00	707,729.26	40.72	38.00	14.91
2019-2020	1,290,388.60	1,001,255.00	752,182.65	COVID-19	COVID-19	COVID-19
2021-2021	1,380,692.08	1,186,866.00	736,250.04	32.16	29.00	16.16
2021-2022	1,420,109.20	1,360,134.00	633,471.13	48.52	47.00	15.61
Average	1,327,718.21	1,113,144.40	712,877.85	40.36	38.25	15.19

**Table 4.18:**

*Medium-Sized TPCS: Descriptive Statistics for Percentage of Facilities Maintenance of All Funds and Operation Expenses and Student Achievement*

School Year	Facilities Maintenance and Operation Expenses (%) of All Funds			Student Achievement STAAR Scores (%)		
	Mean	Median	Standard Deviation	Mean	Median	Standard Deviation
Average	16.12	15.00	6.13	40.36	38.25	15.19

### **Large Sized TPCS**

Tables 4.17 and 4.18 display the demographic characteristics of TPCS facilities maintenance and operation expenses per year and the average respective student achievement rates for large-sized TPCS. The mean facilities maintenance and operation expenses were \$6,033,446.48 (median = \$2,752,051.40), and the mean percentage of facilities maintenance and operation expenses from all funds of 14.19% (median = 12.81%). Student achievement rates ranged from 11.0% to 79.8%, reporting an average rate of 42.9%. When examining the relationship between facilities maintenance and operation expenses and student achievement within large-sized TPCS, findings indicated that a relationship did not exist between facilities maintenance and operation expenses and student achievement,  $r(63) = .192, p = .357$ . This suggests that for large-sized TPCS, the facilities maintenance and operation expenses did not have any bearing on student achievement.

**Table 4.19:**

*Large-Sized TPCS: Descriptive Statistics for Facilities Maintenance and Operation Expenses and Student Achievement*

School Year	Facilities Maintenance and Operation Expenses (\$)			Student Achievement STAAR Scores (%)		
	Mean	Median	Standard Deviation	Mean	Median	Standard Deviation
2017-2018	4,054,445.03	2,385,544.00	5,861,304.92	43.63	43.00	13.30
2018-2019	5,283,664.57	2,627,176.00	8,277,096.07	45.57	46.00	13.11
2019-2020	5,928,043.14	2,764,236.00	10,006,485.22	COVID-19	COVID-19	COVID-19
2021-2021	6,957,134.60	3,406,507.00	11,759,149.21	32.83	31.50	12.99
2021-2022	7,943,945.05	3,517,924.00	14,186,838.05	49.65	48.00	14.46
Average	6,033,446.48	2,752,051.40	9,847,151.71	42.92	36.88	14.61

**Table 4.20:**

*Large-Sized TPCS: Descriptive Statistics for Percentage of Facilities Maintenance of All Funds and Operation Expenses and Student Achievement*

School Year	Facilities Maintenance and Operation Expenses (%) of All Funds			Student Achievement STAAR Scores (%)		
	Mean	Median	Standard Deviation	Mean	Median	Standard Deviation
Average	14.19	12.81	6.39	42.92	36.88	14.61

### Research Question Five

Research question five (*Is there a relationship between the superintendent's salary and student achievement within small, medium, and large charter schools?*) was answered by calculating descriptive statistics and a Pearson's product-moment correlation ( $r$ ) between superintendent salaries and STAAR scores for small, medium, and large sized public charter schools. When examining the relationship between superintendent salaries and student achievement across small, medium, and large TPCS,

results indicated that a relationship was not found to exist between superintendent salaries and student achievement for small, medium, and large school districts ( $p > .05$ ).

### Small Sized TPCS

Table 4.19 displays the demographic characteristics of the TPCS superintendent's salary per year and the average respective student achievement rates for small-sized TPCS. The mean superintendent salary was 115,859.79 (median = 107,543.90). Student achievement rates ranged from 12.5% to 78.3%, reporting an average rate of 39.9%. When examining the relationship between the superintendent's salary and student achievement within small-sized TPCS, findings indicated that a relationship did not exist between the superintendent's salary and student achievement,  $r(54) = .208, p = .132$ . This suggests that for small-sized TPCS, the superintendent's salary did not have any bearing on student achievement.

**Table 4.21:**  
*Small-Sized TPCS: Descriptive Statistics for Superintendent Salaries and Student Achievement*

School Year	Superintendent Salary (\$)			Student Achievement STAAR Scores (%)		
	Mean	Median	Standard Deviation	Mean	Median	Standard Deviation
2017-2018	111,880.07	99,275.00	50,097.02	38.61	37.50	16.78
2018-2019	112,286.54	99,275.00	48,718.46	39.80	35.00	16.48
2019-2020	116,141.48	104,440.00	49,284.84	COVID-19	COVID-19	COVID-19
2021-2021	118,388.57	107,322.00	51,271.10	31.74	28.50	16.81
2021-2022	121,602.30	115,347.00	51,814.46	49.46	49.00	18.51
Average	115,859.79	107,543.90	47,103.94	39.90	36.00	15.48

## Medium Sized TPCS

Table 4.20 displays the demographic characteristics of the TPCS superintendent's salary per year and the average respective student achievement rates for large-sized TPCS. The mean superintendent salary was 137,600.18 (median = 136,344.60). Student achievement rates ranged from 17.0% to 82.8%, reporting an average rate of 40.4%. When examining the relationship between financial accountability and student achievement within medium-sized TPCS, findings indicated that a relationship did not exist between superintendent salary and student achievement,  $r(25) = .313, p = .128$ . This suggests that for large-sized TPCS, the superintendent's salary did not have any bearing on student achievement.

**Table 4.22:**

*Medium-Sized TPCS: Descriptive Statistics for Superintendent Salaries and Student Achievement*

School Year	Superintendent Salary (\$)			Student Achievement STAAR Scores (%)		
	Mean	Median	Standard Deviation	Mean	Median	Standard Deviation
2017-2018	128,708.44	120,000.00	39,943.40	40.04	38.00	16.04
2018-2019	134,674.64	138,223.00	39,597.05	40.72	38.00	14.91
2019-2020	147,242.88	139,012.00	34,448.78	COVID-19	COVID-19	COVID-19
2021-2021	130,758.56	130,000.00	41,711.93	32.16	29.00	16.16
2021-2022	146,616.40	142,000.00	35,182.82	48.52	47.00	15.61
Average	137,600.18	136,344.60	32,862.99	40.36	38.25	15.19

## Large Sized TPCS

Table 4.21 displays the demographic characteristics of superintendent salary per year and the average respective student achievement rates for large-sized TPCS. The mean superintendent salary was 165,371.39 (median = 136,344.60). Student achievement rates ranged from 11.0% to 79.8%, reporting an average rate of 42.9%. When examining the relationship between superintendent salary and student achievement within large-sized TPCS, findings indicated that a relationship did not exist between superintendent salary and student achievement,  $r(63) = .205, p = .107$ . This suggests that for large-sized TPCS, the superintendent's salary did not have any bearing on student achievement.

**Table 4.23:**

*Large-Sized TPCS: Descriptive Statistics for Superintendent Salaries and Student Achievement*

School Year	Superintendent Salary (\$)			Student Achievement STAAR Scores (%)		
	Mean	Median	Standard Deviation	Mean	Median	Standard Deviation
2017-2018	145,432.65	124,156.00	57,100.02	43.63	43.00	13.30
2018-2019	154,244.37	140,000.00	60,946.36	45.57	46.00	13.11
2019-2020	167,157.54	149,600.00	63,406.98	COVID-19	COVID-19	COVID-19
2021-2021	177,197.33	153,750.00	69,529.23	32.83	31.50	12.99
2021-2022	182,824.08	164,000.00	68,357.04	49.65	48.00	14.46
Average	165,371.39	149,600.00	60,317.08	42.92	36.88	14.61

## **Research Question Six**

Research question six (What are the superintendent's perceptions concerning the impact of public charter school student achievement?) was answered by using a qualitative inductive coding process. In an attempt to capture a more in-depth understanding of the relationship between school funding and student achievement scores, nine public charter school superintendents (3 small, 3 medium, and 3 large) were interviewed for their perceptions on the issue. The inductive coding analysis derived four distinct themes or categories of responses concerning school funding and its relationship to student achievement: (a) strategic priorities, (b) teachers' retention and support, (c) financial accountability, and (d) facility management. The emergent themes are provided below, followed by a sample of the superintendent's comments.

### **Strategic Priorities**

In regard to superintendents' perceptions about the factors contributing to student achievement. All nine of the TPCS superintendents felt that having strategic priorities was a key factor. The theme of strategic priorities strongly emerged from the interviews conducted with nine superintendents. Each superintendent highlighted the critical importance of strategic planning, data-driven decision-making, and the prioritization of resources to enhance student achievement within their respective charters. When asked, *"What do you contribute to making a difference in the STAAR scores of your students?"* A large-sized TPCS superintendent emphasizes the importance of data in guiding decision-making processes within the charter school. The superintendent mentioned, "We constantly analyze student achievement data, enrollment numbers, attendance rates, and program placements to inform budgeting and resource allocation." Another Superintendent from a small-sized TPCS mentioned, "We use data-driven decision-making processes to inform budgeting and resource allocation. We use strategic planning



involving projecting revenue, setting priorities, and making data-informed decisions to achieve school goals.”

When the superintendents were asked, “*Do you think that having more funding will assist your charter in achieving a higher percentage of students passing the STAAR test?*” All three of the medium-sized and all three of the large-sized superintendents said that more funding was not the answer; instead, they claimed that it was more about financial management and budgeting. They emphasized the need to maintain a balanced budget, build net reserves, and manage staffing costs to ensure they do not exceed a certain percentage of the budget. Additionally, there were discussions on debt management and maintaining a reasonable debt-per-student ratio. Furthermore, stress was placed on data collection and revenue generation through effective programs. A superintendent from a medium-sized TPCS claimed that “it is all about the role of the superintendent and the importance of organizing schools around curricular programs, sound instructional practices, and effective assessment modules to improve student achievement.”

When asked, “*If you were provided with additional funding, where would you allocate those funds to assist your charter in achieving higher STAAR results?*” Seven out nine (78.0%) superintendents prioritized investments in teacher training and content knowledge, reducing class sizes and enhancing instructional practices over facilities or administrative costs. A medium-sized TPCS superintendent mentioned, “It is strong educators, instructional strategies, and personalized support for students that improved their STAAR scores. Identifying student needs, providing scaffolding, and employing research-based practices to close learning gaps effectively is crucial.” Additional comments were made around the role of school leaders in improving student performance, emphasizing the importance of effective leadership and strategic allocation

of additional funding to train staff, reduce class sizes, provide quality curriculum, and support leadership development.

Furthermore, the superintendents emphasized the importance of strategically shaping the educational environment through effective teaching strategies, professional development, and curriculum alignment to improve standardized test scores. They highlighted the importance of investing in hiring quality teachers and providing resources, intervention programs, and student support services. All of the small TPCS superintendents spoke on strategic budget planning, prioritizing instruction, and maintaining a healthy fund balance to support the long-term growth and success of the charter school.

### **Teachers' Retention and Support**

When analyzing funding allocation and student achievement, All of the TPCS superintendents (100%) mention the role of the teacher as a contributing factor. Seven out of nine interviews (2 from small, 3 from medium, and 2 from large) discuss strategies for retaining quality teachers, investing in professional development, and providing support programs to enhance teacher effectiveness. The Teacher Retention and Support theme emerged prominently from the interviews conducted, with superintendents emphasizing various strategies to retain quality educators and support their professional growth. One large-sized superintendent mentioned “the importance of teacher retention, especially in economically disadvantaged schools, where high turnover negatively affects student success. To address this, the district implemented a longevity pay increase for teachers who stay for three years or more, leading to a 94% retention rate...using extra funds to redesign the school day and incorporating intervention workshops led by experienced teachers, which significantly improved student outcomes.” The interviewees

highlighted the importance of staffing as a top priority in budget allocation, considering competency, longevity, and mission alignment.

Moreover, the interviews revealed a focus on hiring quality teachers and providing professional development as part of strategic priorities. There were mentions of funding allocation in relation to student achievement, recognizing its impact on teacher salaries, support services, and instructional programs. One large-sized superintendent mentioned, “We prioritized compensation for educators and investing in resources to support struggling students as part of budget priorities.” Another superintendent from a medium-sized TPCS shared “a focus in the budget for teacher support that includes the allocation of funding for math and reading coaches, interventionists, and extra tutorials to support teachers and students.”

### **Financial Accountability**

Superintendents emphasized the significance of understanding finance for effective school management, including budgeting, revenue forecasting, and cost analysis. All of the superintendents (100%) touched upon the significance of effective financial management, including budgeting, allocating funds to support student achievement, and ensuring transparency and accountability in financial decisions. A significant focus of the discussions was on maintaining a balanced budget, net reserves, and keeping debt within reasonable limits. A small-sized TPCS superintendent shared, “It is very important for us to manage staffing and facility costs to ensure financial flexibility effectively. Accurate data in PEIMS collections for revenue generation are critical for optimizing our financial health.”

When asked, “*What are your thoughts on Charter FIRST and its impact on student achievement?*” All of the superintendents (100%) believe Charter FIRST does not directly impact student achievement. However, five out nine superintendents believe

administrative costs indirectly impact student achievement by supporting effective governance and resource allocation. A small-sized superintendent mentioned, “There is a need for efficient organizational structures and avoiding overinflated administrative expenses. A well organize schools with streamlined administrative processes tend to operate more effectively. A superior rating in financial accountability does not necessarily translate to higher student achievement, as there may be schools with superior ratings but lower academic performance. Instead, strategic resource allocation, teacher development, parental involvement, and conducive learning environments improve student outcomes.”

When asked, “*What budgetary priorities and constraints do you consider when working on the budget?*” Six out of nine superintendents highlighted challenges with budgetary predictions, including factors such as student enrollment and special education services. A medium-sized superintendent shared that the budget process is set around priorities based on student needs, and balancing these priorities with budget constraints and limitations is always challenging.” A large-sized superintendent shared that “the budget needs to be developed with a lot of planning involving projecting revenue, setting priorities, identifying constraints, and making data-informed decisions to achieve school goals.”

### **Facility Management**

When talking to the TPCS superintendents, five out of nine interviews directly addressed facility management, mentioning the importance of maintaining facilities conducive to learning and the challenges associated with managing facilities within budget constraints. *When asked, “Does the amount spent on facility and maintenance operations impact your students' achievement? If so, how?”* A medium-sized superintendent shared, “I understand that it is important to maintain clean and dignified

campuses, but I do not believe that investments in facilities will correlate with academic achievement. A small-sized superintendent shared, “When thinking about student achievement, we have to be careful not to prioritize comfort over additional instructional support due to budget constraints. We need to keep facility costs within certain thresholds.”

### **Summary of Findings**

#### **Financial Accountability and Administrative Cost Ratio**

Regarding the potential relationship between financial accountability and student achievement, findings from this research with data examination across TPCS sizes, results indicated that a relationship was not found to exist between financial accountability and student achievement for small, medium, and large school districts ( $p > .05$ ). Additionally, when analyzing superintendents’ perceptions, 100% of superintendents interviewed agreed that they did not believe that financial accountability ratings had any relationship with student achievement.

Regarding the potential relationship between administrative cost ratio and student achievement, findings from this research with data examination across TPCS sizes, results indicated that a relationship was not found to exist between financial accountability and student achievement for small and large school districts ( $p > .05$ ). However, results indicated that there is a statistically significant positive relationship between administrative cost ratio and student achievement for medium-sized TPCS ( $p < .05$ ) In addition when analyzing superintendents’ perceptions, 78% of superintendents interview agreed that if given more funding it will be used for teacher retention and support and not to increase their administrative staff.

## **Personnel and Facility Expenditures**

Regarding the potential relationship between personnel expenditures and student achievement, findings from this research with data examination across TPCS sizes results indicated that a relationship was not found to exist between personnel expenditures and student achievement for small and large school districts ( $p > .05$ ). However, results indicated that there is a statistically significant positive relationship between personnel expenditures and student achievement for medium-sized TPCS ( $p < .05$ ). Furthermore, when analyzing superintendents' perceptions, 100% of superintendents interviewed agreed that the teacher role is a factor in student achievement, with 78% focusing on strategies for retaining quality teachers. The need to focus on other roles was not a theme that emerged from the interviews.

Regarding the potential relationship between facility expenditures and student achievement, findings from this research with data examination across TPCS sizes, results indicated that a relationship was not found to exist between facility maintenance and operation expenses and student achievement for small, medium, and large school districts ( $p > .05$ ). In addition, when analyzing superintendents' perceptions, 56% of superintendents interview addressed facility management, mentioning the importance of maintaining facilities conducive to learning and the challenges associated with managing facilities within budget constraints.

## **Superintendent Salary**

Regarding the potential relationship between superintendent salary and student achievement, findings from this research with data examination across TPCS sizes, results indicated that a relationship was not found to exist between superintendent salary and student achievement for small, medium, and large school districts ( $p > .05$ ). Also, when analyzing superintendents' perceptions, 0% of superintendents interviewed

mentioned superintendent salary to be a factor for student achievement, and 100% of the TPCS superintendents felt that having strategic priorities was a key factor. The superintendent's role leads strategic priorities.

## CHAPTER V: SUMMARY IMPLICATIONS AND RECOMMENDATIONS

Recent years have observed a surge in the nationwide discourse surrounding the comparison between public charter schools and traditional public schools (TPS), with a keen focus on funding allocation and student achievement (Chen & Harris, 2022; Nowicki, 2021; Shakeel et al., 2021). While research on charter schools has provided varied insights, the intricate nature of public charter school systems requires a closer examination (Dallavis & Berends, 2023; Nowicki, 2021). Notably, disparities in student achievement and fund allocation among charter organizations underscore the complexity of this issue (Dallavis et al., 2022; Nava, 2019). Moreover, persistent questions regarding funding distribution and consistency within charter school systems persist (Dallavis & Berends, 2023; Nava, 2019; Shakeel et al., 2021).

Despite a significant demand for Texas public charter schools (TPCS), boasting a current enrollment of 375,000, with over 66,000 students on TPCS waitlists, marking a 13.5% increase in the past year (Texas Education Agency [TEA], 2022). There remains a paucity of research specifically examining the intricate relationship between fund allocations within TPCS, leaving considerable gaps in our understanding (Dallavis & Berends, 2023; Nowicki, 2021; Shakeel et al., 2021). To investigate school funding as a factor of student achievement, this study investigated TEA's Charter FIRST, TPRS, and PEIMS data on 142 Texas public charter schools, which make up 77% of all active Texas public charter schools during the 2022-2023 school year, and interview transcripts for 9 of those charter superintendents. This chapter presents a detailed discussion of the findings, along with the implications of these findings and future research recommendations.



## Summary

The purpose of this study was to investigate the relationship between funding allocation in Texas public charter schools and student achievement. Existing literature has documented the significant influence of school finance on student performance (Baker et al., 2012; Carpenter, 2013). Moreover, the ongoing debate surrounding charter schools, thoroughly explored by advocates and critics alike (Barden & Lassmann, 2016; Dallavis & Berends, 2023; DeAngelis & Barnard, 2021), further emphasizes the importance of this research. With Texas housing a substantial number of charter schools, including 185 Texas Public Charter Schools (TPCS), the state plays a pivotal role in the charter school movement. Consequently, there is an urgent need to enhance our understanding of how the financial practices of Texas charter schools impact student achievement (Baker et al., 2012; Carpenter, 2013).

This study addressed the following research questions: (1) Is there a relationship between the financial accountability rating and student achievement within small, medium, and large charter schools? (2) Is there a relationship between the administrative cost ratio and student achievement within small, medium, and large charter schools? (3) Is there a relationship between personnel expenditures and student achievement within small, medium, and large charter schools? (4) Is there a relationship between facilities maintenance and operations expenses and student achievement within small, medium, and large charter schools? (5) Is there a relationship between the superintendent's salary and student achievement within small, medium, and large charter schools? (6) What are the superintendent's perceptions concerning the impact of public charter school funding allocations on student achievement? By addressing these questions, the study aims to contribute to the existing knowledge base and understanding of the impact of funding allocation on student achievement in public charter schools.

The development and explosion of charter schools, particularly in Texas, have sparked debates regarding their effectiveness compared to traditional public schools. Charter schools were introduced in the early 1990s with the aim of providing alternatives for students facing challenges in traditional educational settings. These schools offer autonomy over resources, curriculum, and personnel decisions, which proponents argue enhances accountability and effectiveness (Nava, 2019; Chen & Harris, 2022). However, research on the academic outcomes of charter schools compared to traditional public schools yields mixed results (Barden & Lassmann, 2016). While some students perform better in charter schools, others do not, and there are concerns about disparities in enrolling students with disabilities (Epple et al., 2016).

Financial disparities and funding allocation challenges, such as the lack of facility funding, have also raised concerns (Gleason, 2017; Wood, 2019). Legislative initiatives, such as House Bill 1882, enacted in 2017, have encouraged collaboration between traditional and charter school districts, resulting in a surge in charter school enrollment across Texas (Texas Legislature, 2017; TEA, 2020). However, critics question the accountability frameworks and funding disparities inherent in the charter school model (Bernal, 2019; Texas Association of School Boards, 2020).

This study highlights the need to delve deeper into the diverse budgetary operations within public charter schools and their potential impact on student achievement. By examining the funding allocations, to understand better the factors influencing student outcomes in these educational settings. Despite the debates surrounding charter schools, their continued growth in Texas underscores the importance of addressing any funding disparities and accountability frameworks to ensure equitable educational opportunities for all students.

The data gathered for the study comprises information on a purposeful sample of Texas public charter schools. Texas has a total of 185 public charter school systems, serving a combined student population of 377,375. The student demographics show that Hispanic students make up the largest percentage of enrollment at 62.8%, 71.2% economically disadvantaged students, 54.8% at risk, 30.4% emergent bilingual, and 8.4% special education students. Texas Public Charter Schools employ a staff composition consisting of 64.6% minorities, with 2% of staff serving as central office administrators. The teachers in TPCS are primarily White (39.4%), Hispanic (34%), and African American (20.6%) (TEA, 2021).

All data was analyzed using IBM SPSS software. Data sources included the Texas Education Agency (TEA): (a) Texas Academic Performance Reports (TAPR), (b) Financial Integrity Rating System of Texas (FIRST), and (c) Public Education Information Management System (PEIMS). The study focused on the period 2017-2022, during which cutoff points for assessing school performance remained constant, except for the 2019-2020 academic year due to the COVID-19 pandemic. Additionally, A purposeful sample of 9 superintendents from participating public charter schools were interviewed. Interview questions explored superintendents' perceptions of the impact of public charter school funding on student achievement.

Pearson's product-moment correlations ( $r$ ) were employed to investigate relationships between student achievement and: (a) overall Financial Integrity Rating System of Texas (FIRST) rating, (b) administrative cost ratio, (c) payroll expenses, (d) facility maintenance and operations, and (e) superintendent salary. Since all variables were continuous, Pearson's product-moment correlations ( $r$ ) were deemed suitable. For statistically significant relationships, the coefficient of determination ( $r^2$ ) measured effect size, indicating the proportion of variance in the dependent variable attributed to

the independent variable. A significant level of .05 was used for hypothesis testing (Gravetter & Wallnau, 2008). Simultaneously with quantitative analysis, superintendent interviews provided deeper insights into the potential impact of public charter school funding allocation on student achievement.

Qualitative data from interviews were analyzed using inductive coding to build an empirical understanding. The coding process involved data reduction to identify themes and patterns. Transcripts were analyzed for recurring themes, and data were summarized in written form. Importance was placed on identifying themes and patterns relevant to the study's key issues (Stake, 1995). The findings informed conclusions—mixed data allowed for triangulation, cross-validating findings within the study. Quantitative and qualitative data were collected concurrently and analyzed subsequently, ensuring a comprehensive understanding. Multiple superintendents of public charter schools with expertise in funding were interviewed to ensure the validity and reliability of findings (Stake, 1995).

The study addressed six research questions regarding the relationship between various factors and student achievement in small, medium, and large charter schools. For research question one, which investigated the relationship between financial accountability and student achievement, Results indicated no significant relationship between financial accountability and student achievement across all school sizes ( $p > .05$ ). Research question two examined the relationship between administrative cost ratio and student achievement. While a statistically significant positive relationship was found for medium-sized schools ( $p < .05$ ), no significant relationship was observed for small and large schools ( $p > .05$ ). Similarly, research question three explored the relationship between personnel expenditures and student achievement. A statistically significant

positive relationship was found for medium-sized schools ( $p < .05$ ), but no significant relationship was observed for small and large schools ( $p > .05$ ).

Research question four investigated the relationship between facility maintenance, operation expenses, and student achievement. Results indicated no significant relationship across all school sizes ( $p > .05$ ). For research question five, which examined the relationship between superintendent salary and student achievement, no significant relationship was found for any school size ( $p > .05$ ). Finally, research question six explored superintendent perceptions regarding the impact of public charter school student achievement. The semi-structured interviews revealed four themes: strategic priorities, teachers' retention and support, financial accountability, and facility management.

### **Implications**

The findings revealed a noteworthy relationship within medium-sized charter schools with student populations ranging from 500 to 999. Specifically, significant associations were identified between student achievement and both the percentage of personnel expenditures and the maintenance of a low administrative cost ratio in this school size category. A body of literature provides further support for the significance of low administrative costs and strategic personnel expenditures in enhancing student achievement. For example, Baker et al. (2012) conducted a comprehensive study comparing the per-pupil spending of major charter management organizations (CMOs) in various regions to that of traditional district schools. Their research highlighted that certain charter chains in Texas, such as KIPP, allocated considerably higher funds per pupil compared to similar district schools. This suggests a potential positive impact on student achievement resulting from increased personnel and educational resources investments. These findings underscore the importance of vigilant expense management, particularly for medium-sized or expanding Texas public charter schools (TPCS). Such

schools must closely monitor expenditure across different categories to optimize resource allocation and potentially enhance student outcomes.

Conversely, both small and medium-sized TPCS exhibited no significant relationships with any of the factors investigated. Specifically, financial accountability, maintenance and operations expenses, and superintendent salary did not demonstrate any statistically significant relationship across any TPCS size categories. These findings aligned with the multiple studies that have explored the impact of charter schools on student achievement and have revealed a nuanced picture of their effects. Chen and Harris (2022) found charter schools improve math and reading achievement across diverse student groups. In contrast, Gulosino et al. (2020) suggested limited academic gains in affluent suburban charter schools. These findings underscore the importance of considering specific contexts and student demographics when assessing charter school performance.

When looking at the literature on the role of Superintendents, we find that superintendents play a vital role in shaping district missions, providing instructional leadership, and engaging in policy entrepreneurship (Gawlik & Allen, 2020). The success of these schools depends on various factors, including the superintendent's leadership and their ability to define the district's mission (Gawlik & Allen, 2020). This aligns with the superintendent's perception of the importance of strategic priorities in driving student achievement within charter school. They emphasized the importance of strategic planning, data-driven decision-making, and resource prioritization as critical elements in achieving educational goals. Moreover, their responses highlighted the proactive approach taken by charter school leaders in utilizing data to inform budgeting and resource allocation decisions. This proactive stance towards strategic planning reflects a commitment to optimizing available resources to enhance student outcomes.

Additionally, the superintendents emphasized the role of effective leadership in shaping the educational environment and fostering a culture of continuous improvement. Overall, their perspectives highlight the integral role of strategic priorities in driving student success within charter schools.

Drawing from both the literature and qualitative insights, a key finding of this study underscores the significance of superintendents' grasp on setting strategic priorities. This finding resonates with the study's theoretical framework, which is anchored in the Resource-Based View (RBV) theory. RBV underscores the paramount importance of an organization's distinct resources and competencies in fostering competitive advantage and sustained performance. Within the landscape of Texas public charter schools, RBV posits that resource allocation, beyond mere financial considerations, stands as a cornerstone that demands strategic management and utilization to bolster student achievement.

A resource that superintendents highlighted was teacher retention and support, in the context of the Resource-Based View (RBV) theory, Teachers' Retention and Support can be considered a valuable resource for charter schools. RBV emphasizes that an organization's unique resources and capabilities contribute to its competitive advantage and sustained performance. In this case, teachers' retention and support can be seen as a critical resource that enables charter schools to enhance student achievement and maintain their competitive edge. Retaining quality teachers and providing them with ongoing support and professional development programs are essential strategies highlighted by superintendents in the study. These efforts contribute to building a skilled and dedicated teaching workforce, which is instrumental in delivering high-quality education and improving student outcomes.

By investing in teacher retention and support initiatives, charter schools can leverage this resource to attract and retain talented educators who are aligned with the

school's mission and committed to student success. Furthermore, allocating funds toward teacher salaries, support services, and instructional programs demonstrates the strategic importance placed on staffing and teacher support. By prioritizing these areas in budget allocation decisions, charter schools can effectively utilize resources to create a supportive environment that fosters teacher growth and enhances student learning experiences.

However, despite the critical role of superintendents in shaping organizational factors, the salary of the superintendent did not show any significance on student achievement. Therefore, it is suggested for school boards to enhance superintendent compensation beyond base salary by incorporating training programs. These programs should focus on developing leadership skills to set strategic priorities and implement effective teacher retention strategies. As highlighted by Gawlik and Allen (2020), superintendents in charter school districts play pivotal roles in organizational dynamics, emphasizing the importance of providing training to ensure effective leadership in navigating strategic priorities and teacher retention initiatives.

### **Recommendation for Future Research**

In terms of future research directions, delving deeper into superintendent perceptions and experiences regarding funding allocation and student achievement through qualitative research methods, such as interviews or focus groups, could provide valuable insights. By exploring the perspectives of superintendents, researchers can uncover the underlying mechanisms driving any observed relationships between funding allocation practices and student outcomes. This qualitative data would offer rich contextual understanding, shedding light on the strategic decision-making processes within charter schools and the ways in which funding priorities are established and implemented to support student success. Moreover, qualitative exploration can capture



the intricacies of teacher retention strategies employed by charter schools, providing insights into the effectiveness of these initiatives and their impact on teacher morale, professional development, and ultimately, student achievement.

Additionally, conducting in-depth case studies of individual charter schools would offer a nuanced understanding of how unique funding allocation strategies shape student outcomes. By examining the contextual factors and organizational dynamics at play within specific charter school settings, researchers can identify best practices and areas for improvement in funding allocation practices. These case studies would provide actionable insights for charter school administrators and policymakers.

### **Conclusion**

The examination of funding allocation in Texas public charter schools and its correlation with student achievement has shed light on critical aspects of educational equity and effectiveness. As underscored by previous literature (Baker et al., 2012; Carpenter, 2013), understanding the intricate relationship between school finance and academic performance is important to increase student outcomes and ensuring positive societal outcomes. The current study delved into six research questions, probing various factors such as financial accountability, administrative cost ratio, personnel expenditures, facility maintenance, superintendent salary, and superintendent perceptions regarding funding impact. While the findings revealed different relationships associations between these factors and student achievement across different school sizes, several important insights emerged. This study offers valuable contributions to the ongoing discourse on educational finance and effectiveness.

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APPENDIX A:  
INFORMED CONSENT

You are being asked to participate in the research project described below. Your participation in this study is entirely voluntary, and you may refuse to participate, or you may decide to stop your participation at any time. Should you refuse to participate in the study or should you withdraw your consent and discontinue participation in the study, your decision will involve no penalty or loss of benefits to which you may be otherwise entitled. You are being asked to read the information below carefully and ask questions about anything you don't understand before deciding whether or not to participate.

**Title: A Study of Texas Public Charter Schools Funding Allocations and Student Achievement**

**Student Investigator:** Giselle Easton  
**Faculty Sponsor:** Dr. Antonio Corrales

**PURPOSE OF THE STUDY**

The purpose of this study will be to examine the relationship between school funding allocation and student achievement in Texas Public Charter Schools.

**PROCEDURES**

As a Superintendent participating in the interview process, you will be asked to share how you distribute the charter funds among your campuses, and departments and discuss your perceptions about the impact of funding on STAAR rates. Interviews will be semi-structured in format, last about 30 minutes, and audiotaped.

**EXPECTED DURATION**

The total anticipated time commitment would be approximately 30 minutes.

**RISKS OF PARTICIPATION**

There are no anticipated risks associated with participation in this project.

**BENEFITS TO THE SUBJECT**

Participants will not benefit monetarily from the study.

**CONFIDENTIALITY OF RECORDS**

Every effort will be made to maintain the confidentiality of your study records. The data collected from the study will be used for educational and publication purposes. However, you will not be identified by name. For federal audit purposes, the participant's documentation for this research project will be maintained and safeguarded by the researcher for three years after completion of the study. After that time, the participant's documentation may be destroyed.

**FINANCIAL COMPENSATION**

There is no financial compensation to be offered for participation in the study.

**INVESTIGATOR'S RIGHT TO WITHDRAW PARTICIPANT**

The investigator has the right to withdraw you from this study at any time.

**CONTACT INFORMATION FOR QUESTIONS OR PROBLEMS**

The investigator has offered to answer all your questions. If you have additional questions during the course of this study about the research or any related problem, you may contact the Student Researcher, Giselle Easton, at phone number 832-421-6627 or by email at [giselle.easton@gmail.com](mailto:giselle.easton@gmail.com) or the Faculty Sponsor, Dr. Antonio Corrales at [corrales@uhcl.edu](mailto:corrales@uhcl.edu)

**SIGNATURES:**

**Your signature below acknowledges your voluntary participation in this research project. Such participation does not release the investigator(s), institution(s), sponsor(s) or granting agency(ies) from their professional and ethical responsibility to you. You are not waiving any of your legal rights by signing the form.**

The purpose of this study, procedures to be followed, and explanation of risks or benefits have been explained. You have been allowed to ask questions, and your questions have been answered to your satisfaction. You have been told who to contact if you have additional questions. You have read this consent form and voluntarily agree to participate as a subject in this study. You are free to withdraw your consent at any time by contacting the Student Researcher or Faculty Sponsor. You will be given a copy of the consent form you have signed.

Subject's printed name: \_\_\_\_\_

Signature of Subject: \_\_\_\_\_

Date: \_\_\_/\_\_\_/\_\_\_\_\_

Using language that is understandable and appropriate, I have discussed this project and the items listed above with the subject.

Printed name and title: Giselle Easton, Doctoral Candidate

Signature of Person Obtaining Consent: \_\_\_\_\_

Date: \_\_\_\_\_

APPENDIX B:  
INTERVIEW GUIDE

1. What do you contribute to making a difference in the STAAR scores of your students?
2. Do you think that having more funding would assist your LEA in achieving a higher percentage of students passing the STAAR test? Why or why not?
3. If you were provided with additional funding, where would you allocate those funds to assist your charter in achieving higher STAAR results?
4. Does the amount spent on facility and maintenance operations impact your students' achievement? If so, how?
5. Does the amount spent on administrative cost services impact your students' achievement? If so, how?
6. What are your thoughts on Charter FIRST and its impact on student achievement?
7. What budgetary priorities and constraints do you consider when working on the budget?
8. Do you have any questions for me?