Equity Under Constraint

Resource Allocation, Educational Innovation, and the Case for Funding Parity in Rochester's Charter Schools

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About the Author

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Dr. DeFilippis holds an Ed.D. in Educational Leadership, Administration, and Policy from Fordham University, a Professional Diploma in School District and Building Leadership from Manhattanville College, a Master of Arts in Teaching in Secondary Social Studies from Manhattanville College, and a Bachelor of Arts in History and English from the University at Albany (SUNY). His scholarly work focuses on equity-driven school improvement, critical race improvement science, and the intersection of resource allocation with educational outcomes for historically underserved students.

His published work includes *Equity-Driven Change: Leading Principals Through Short-Cycle Improvement Work* (Teacher's College Press, 2025), *Towards Synergistic Critical Race Improvement Science in Continuous Improvement Inquiry* (Information Age Publishing, 2023), and co-authored contributions on district-university partnerships for continuous improvement (Rowman & Littlefield, 2023) and artificial intelligence in education (Soul Excellence, 2024). He has presented talks at the Carnegie Foundation for the Advancement of Teaching, the World Federation of United Nations Associations, the National Alliance for Black School Educators, the National Charter School Conference on Innovative Strategies, and the NYU AI Summit, among others.

Prior to his academic career, Dr. DeFilippis served as Assistant Superintendent for the New York City Department of Education, where he led equity-based improvement science across more than 150 Bronx schools, increasing student attendance and graduation rates while reducing disproportionality. He previously served as a building principal, department chairperson, and classroom teacher in New York public schools, beginning his career as an English and Social Studies teacher in grades 7 through 12. His professional trajectory from classroom teacher to school leader to district administrator to university faculty and independent researcher informs the practitioner-centered perspective that shapes this study.

Through Palmer Contextual Solutions, Dr. DeFilippis provides research, consulting, and executive coaching services to school districts, charter networks, state education agencies, and educational organizations nationwide. The present study was commissioned by The Summers Foundation of Rochester, New York, as part of Palmer Contextual Solutions' engagement to conduct a comprehensive evaluation of resource allocation and educational outcomes across Rochester's charter school sector.

I. Introduction and Executive Summary

The Problem

Rochester, New York, is a city defined by paradox. It is home to world-class universities and medical institutions, yet ranks among the highest nationally in child poverty. It is a city whose public charter schools serve approximately 9,200 students, 30% of the K–12 public school population, with documented academic results that in many cases equal or exceed those of the surrounding school district. And it is the only major city in New York State where the charter school per-pupil funding rate has actually *declined*, even as statewide education spending reached historic highs.

This report examines the origins, mechanics, and consequences of that paradox. It documents a per-pupil funding gap of approximately $20,809 between Rochester's charter schools ($15,277 per student in combined state and federal funding) and the Rochester City School District ($36,086 per student when adjusted for instructional comparability). It traces this gap to the structural features of New York's charter school tuition formula, a formula that ties charter funding to aggregate district expenditure growth rates, excludes facilities costs, contains no poverty adjustment, and interacts with the Foundation Aid "hold harmless" provision in ways that mechanically suppress charter per-pupil rates in declining-enrollment districts. And it argues, on the basis of evidence assembled across seven months of field research, quantitative analysis, and engagement with the scholarly literature, that the current formula fails to meet the state's constitutional obligation to provide all children the opportunity for a sound basic education.

The Framework

This study is grounded in a "both/and" conceptual orientation, drawing on Patricia Hill Collins's (1990) rejection of either/or dichotomous thinking in favor of frameworks that hold multiple truths simultaneously, and on Smith and Lewis's (2011) dynamic equilibrium model of organizational paradox. It argues that supporting Rochester's charter schools and supporting the Rochester City School District are not competing goals. This is a wholistic report about charter schools based in and around the city of Rochester, NY. This is not a report about RCSD and uses it for comparison purposes only. RCSD faces its own past and present challenges including a projected $53 million budget gap for 2026–27, health insurance costs rising at 14% annually, declining enrollement of approximately 47% since 1998, and the cumulative consequences of decades of deindustrialization and inadequate state investment. This report does not argue that RCSD is overfunded; it argues that charter schools are underfunded. The disparity is produced by the state's funding formula, not by any decision made at the local level, and the remedy lies at the state level, through new appropriations, formula reform, or both, rather than through redistribution of resources that are already insufficient.

The Research

The study was conducted between September 2025 and March 2026 under a contract with The Summers Foundation. The research employed a concurrent triangulation mixed-method design organized around three research questions:

Research Question 1: What resource management patterns emerge across Rochester's charter schools in relation to their stated missions and goals, and how do these patterns affect program implementation, student opportunities, and educational outcomes?

Research Question 2: How do the resource management and implementation approaches of Rochester's charter schools compare to those of the Rochester City School District, and what promising practices can be identified to benefit all students?

Research Question 3: To what extent do resource management and program implementation approaches across both systems affect equitable access and opportunities for all students, particularly those from historically underserved populations and students with diverse learning needs?

Data collection included semi-structured interviews with charter school leaders, educators, and stakeholders; school and classroom observations; document review of budgets, charter applications, and accountability reports; and quantitative analysis of funding data from the New York State Education Department, the National Center for Education Statistics, and publicly available RCSD budget documents. All interview participants are anonymized throughout the report, and all schools are discussed without identifying names, consistent with the study's ethical protocols.

Summary of Findings

On the funding gap (Section IV): Rochester charter schools receive $14,277 per pupil in state funding for 2025–26, the lowest rate among all comparable New York districts and the only rate that declined in 2024–25. The adjusted per-pupil gap between charter schools and RCSD is approximately $20,809. The gap is produced by a state formula that tracks aggregate rather than per-pupil expenditure growth, excludes facilities costs, contains no poverty weight, and interacts perversely with the hold harmless provision in declining-enrollment districts.

On charter school achievement (Section V): Rochester's charter schools produce academic outcomes that, in many cases, significantly exceed nearby traditional district averages, and achieve 90% graduation rates while serving student populations that are 97% economically disadvantaged. These outcomes reflect diverse instructional models, college-preparatory, expeditionary learning, STEAM-focused, and dual-language, refined through sophisticated data-driven intervention systems and intensive professional development.

On human capital (Section VI): Charter school teachers in Rochester earn 25–27% less than nearby traditional public-school counterparts, lack access to the state's defined-benefit pension system, and work longer hours in longer school years. The sector has achieved notable teacher diversity, more representative than the national average, but the compensation structure creates what this report terms a "non-virtuous equity cycle" in which educators of color are disproportionately concentrated in the lowest-funded schools.

On racial equity (Section VII): The charter funding gap is a racial equity issue. Rochester's charter schools serve approximately 87% students of color in a city where 42% of children live in poverty. The funding formula contains no mechanism to account for the racial composition of the student body or the costs of serving high-need populations. The poverty-funding inversion between Rochester ($14,277 per charter pupil, 42% child poverty) and Yonkers ($18,310 per charter pupil, 17% child poverty) is the starkest illustration of this structural inequity.

The Recommendations

Section VIII presents twelve policy recommendations organized across three tiers, immediate actions, structural formula reform, and long-term institutional investment. As this is not a report about RCSD and does not provide recommendations for RCSD, every recommendation is designed to increase state investment in Rochester's charter schools without reducing funding available to RCSD. Each recommendation includes an explicit assessment of impact on the district. The recommendations range from an immediate state-funded equity supplement for charter schools in high-poverty districts to structural formula reforms that decouple charter tuition from the hold harmless interaction, to the establishment of a Rochester Education Equity Commission charged with developing a comprehensive plan for equitable funding across both sectors.

The fundamental argument of this report is that the state of New York has a constitutional obligation, established by *Campaign for Fiscal Equity* and explicitly extended to Rochester, to provide all public school students the opportunity for a sound basic education. Approximately 9,200 of Rochester's children attend charter schools. They are overwhelmingly low-income, overwhelmingly students of color, and overwhelmingly succeeding despite a funding formula that provides their schools approximately 42 cents of every dollar available to district schools. The evidence presented in this report demonstrates that these children, and the schools that serve them, deserve more.

II. Literature Review: Charter School Funding, Equity, and Educational Innovation

A. Charter Policy and School Finance in New York State

New York's Charter Schools Act (Chapter 4 of the Laws of 1998, Education Law §§ 2850–2857) initially authorized 100 charter schools. The cap has been raised three times since: to 200 in 2007, to the current ceiling of 460 in 2010, and modified by a 2015 amendment establishing a separate New York City sub-cap and a 2023 provision authorizing re-issuance of revoked charters while imposing a 55% enrollment threshold in individual city geographic districts. As of January 2025, 350 charter schools operate statewide, serving over 180,000 students (NYSED, 2025). The New York City sub-cap is fully exhausted; 84 charters remain available outside the city. This geographic distribution of political energy matters: New York's charter policy debates have been overwhelmingly shaped by the city's experience, while upstate communities like Rochester, where charter schools now serve approximately 30% of the public school population, have operated with substantially less political capital and legislative attention.

The funding formula governing charter school tuition has its roots in the *Campaign for Fiscal Equity, Inc. v. State of New York* litigation, which established through three rulings (1995, 2003, 2006) that the state constitution requires all children the opportunity for a "sound basic education." The 2003 decision (100 N.Y.2d 893) explicitly named Rochester, along with Syracuse, Buffalo, and Yonkers, as "fiscally dependent" districts whose students face systemic educational deprivation. The resulting 2007 Foundation Aid formula was designed as a need-based system to fulfill the court's mandate. That same formula now determines charter school tuition rates, yet its application to charter schools produces outcomes that appear to contravene the adequacy principles it was designed to uphold.

Under Education Law § 2856, the Charter School Basic Tuition (CSBT) is the lesser of two figures: the prior year's rate multiplied by the district's Approved Operating Expense growth factor, or total general fund expenditures divided by enrollment. The growth factor method almost invariably produces the lower number. When this formula interacts with the Foundation Aid "hold harmless" provision (which guarantees no district receives less aid than the prior year regardless of enrollment decline), the consequences for charter schools in shrinking urban districts become particularly damaging. Hold harmless sustains total district expenditures near prior-year levels while the student population drops, causing per-pupil district spending to rise mechanically. But charter tuition tracks the growth rate of aggregate expenditures, not per-pupil spending. In a district where total spending is essentially flat, the growth factor falls below 1.0, and charter per-pupil rates actually decline. This is exactly what happened in Rochester in 2024–25: the charter per-pupil rate fell $228 even as statewide Foundation Aid rose 3.9% and RCSD's per-pupil expenditure continued climbing (NYCSA, 2025). Rochester was the only Big Five city where charter rates decreased. The Citizens Budget Commission has recommended the state "quickly phase out the hold harmless provision" (CBCNY, 2024), though this recommendation remains unimplemented.

Collins, P. H. (1990). Black feminist thought: Knowledge, consciousness, and the politics of empowerment. Unwin Hyman.

B. The Charter Funding Gap: National Evidence and Rochester's Position

The national evidence on charter-district funding disparities is extensive and consistent. The School Choice Demonstration Project at the University of Arkansas has produced six iterations of funding analyses since 2005, documenting a steadily widening gap: from 21.7% (Batdorff et al., 2005) to 33% across 18 cities in the most recent study, where charter schools received $7,796 less per pupil than traditional public school counterparts (DeAngelis, Wolf, Maloney, & May, 2020). Rochester has received dedicated attention within this program. McGee, Wolf, and Maloney (2022) identified a 42% funding deficit, a gap of $14,280 per student, with RCSD receiving (approximately) $33,972 per pupil compared to $19,691 for Rochester charter schools in fiscal year 2019–20. The study characterized Rochester's gap as "one of the largest among the nearly 20 urban areas analyzed over the past decade."

The question of whether funding levels matter for educational outcomes has been substantially resolved in the empirical literature. Jackson, Johnson, and Persico (2016) demonstrated that a 10% increase in per-pupil spending sustained across 12 school-age years produced 7.7% higher adult wages, 9.8% higher family income, and measurably lower poverty incidence, with effects significantly larger for students from low-income families. Jackson and Mackevicius (2024), in a meta-analysis of 31 causal studies, confirmed that a $1,000 increase in per-pupil spending sustained for four years improves test scores by 0.032 standard deviations and college-going by 2.8 percentage points. The third edition of the Albert Shanker Institute's *Does Money Matter in Education?* review concludes that the "whether" question is settled: investment improves outcomes, spending cuts cause harm, and the benefits are strongest for disadvantaged students. Even Eric Hanushek, the most prominent skeptic of spending-outcome relationships, has acknowledged in recent interviews that the United States is "underinvesting in education," though he continues to emphasize that the predictability of spending effects varies across contexts. Applied to Rochester, where charter schools serving predominantly low-income students of color receive $14,277 per pupil while RCSD schools receive approximately $32,000–$36,000 depending on the calculation methodology, the adequacy literature strongly supports the conclusion that the funding gap carries measurable educational consequences.

C. Charter School Effectiveness and the Human Capital Crisis

The most comprehensive evidence on charter school effectiveness comes from CREDO's 2023 National Charter School Study III (Raymond, Woodworth, Lee, & Bachofer, 2023), covering 1.8 million charter students across 29 states using a "virtual twin" matching methodology. New York State charter students gained an additional 75 days of learning in reading and 73 days in mathematics compared to matched traditional public school peers, among the strongest state-level results in the study. National effects were more modest (16 additional days in reading, 6 in math), and the New York State sample outside New York City was relatively small (approximately 51 schools), as the National Education Policy Center noted in its review. The study was funded by the Walton Family Foundation and The City Fund, which should be disclosed in academic citation. These caveats do not negate the findings but counsel against treating the New York effect sizes as precise point estimates; they instead indicate a substantively meaningful charter advantage in the state. Additional quasi-experimental evidence from Boston (Abdulkadiroğlu et al., 2011), Harlem (Dobbie & Fryer, 2011), and the KIPP network (Clark et al., 2015) consistently associates charter effectiveness with high expectations,

extended learning time, intensive tutoring, and data-driven instruction, investments that adequate funding makes possible.

Yet the charter sector's capacity to sustain these outcomes is jeopardized by a human capital crisis rooted in funding inequity. Stuit and Smith (2012) established that charter teacher turnover runs approximately 24% annually compared to 14% in traditional public schools, with charter teachers 130% more likely to leave the profession entirely. Subsequent research has confirmed these patterns: Naslund and Ponomariov (2019) found Texas charter turnover of 36.7% versus 18.2% in traditional schools, and Carver-Thomas and Darling-Hammond (2019) documented that teachers leave schools serving higher proportions of students of color at 46% higher rates. National compensation data show traditional public-school teachers averaging $53,400 compared to $44,500 for charter teachers, a gap of 10–15% nationally. In Rochester, the local gap is significantly wider: charter teachers earn approximately $44,801 versus the RCSD average of $61,785, a 25–27% disparity compounded by the absence of defined-benefit retirement systems in most charter schools.

What makes the compensation crisis particularly troubling from an equity standpoint is that charter schools have achieved notably more diverse teaching forces than traditional public schools. Pew Research Center (2024) reports charter teachers are 69% White compared to approximately 80% in traditional public schools, and the National Alliance for Public Charter Schools has documented larger shares of Black and Hispanic teachers in the charter sector. These more diverse educators, who may carry greater educational debt and fewer generational wealth buffers, are drawn to charter schools by mission alignment and the opportunity to serve communities that share their backgrounds, and are then systematically compensated at lower rates. The funding formula thus operates as a mechanism that penalizes teacher diversity: it underfunds the schools where teachers of color are most concentrated, ensuring that educators who serve students of color in high-performing schools earn less than their peers elsewhere in the system.

D. Racial Equity, School Choice, and the Structure of Inequity

The literature on race, school choice, and educational equity reflects genuine tensions. Scholars like Pedroni (2007) and Stulberg (2008) have documented how charter schools can represent sites of agency for communities of color, where families exercise self-determination in pursuit of educational quality that district systems have not consistently provided. Others, including Scott (2009) and Frankenberg, Siegel-Hawley, and Wang (2011), raise concerns that choice-based systems deepen segregation: 70% of Black charter school students nationally attend schools with minority enrollment above 90%. Both perspectives carry empirical weight; this study engages both traditions.

The funding dimension, however, adds a layer that cuts across these debates. National Center for Education Statistics data confirm that charter schools disproportionately serve students of color (26% Black and 33% Hispanic, compared to 15% and 27% in traditional public schools). The Education Trust's Funding Gaps 2018 report found that districts serving the highest proportions of students of color receive approximately $1,800 less per student in combined state and local funding, with racial gaps nearly twice as large as poverty-based gaps (ERIC: ED587198). Rauscher and Fiel (2025), in the most recent examination of this question, found that while state finance reforms successfully reduced income-based funding gaps, they

either failed to close or actually widened gaps between districts serving the highest and lowest shares of Black and Hispanic students. When these patterns are combined with the 33% funding gap documented across 18 urban areas by the University of Arkansas series, the structural implication is clear: underfunding charter schools systematically underfunds schools that disproportionately serve students of color.

Rochester's position within this national landscape is extreme. The city's charter schools serve student populations that are approximately 87% students of color and 97% economically disadvantaged, in a metropolitan area where EdBuild (2019) has identified the Rochester–Penfield school district boundary as the single most economically segregating border in the nation. Yet the charter funding formula contains no poverty adjustment. It is driven entirely by district expenditure growth rates, producing the perverse outcome that Rochester's charter schools (operating in a city with a child poverty rate of approximately 42%) receive $14,277 per pupil while charter schools in Yonkers (where the child poverty rate is approximately 17%) receive $18,310. The city with nearly 2.5 times the poverty rate receives 22% less per charter student. This inversion of need and resource is not an accidental byproduct of a complex formula; it is the formula's predictable output when adequacy principles are absent from the calculation.

E. Rochester in the Literature: Existing Research and Knowledge Gaps

Despite the severity of its funding disparities, Rochester has received limited scholarly attention relative to the scale of its charter sector. The McGee et al. (2022) funding analysis remains the only dedicated academic study of Rochester's charter school financing, and no prior comprehensive study has examined charter school resource management practices across the full Rochester network. The Rochester City School District has been the subject of state intervention since 2018, when Distinguished Educator Dr. Jaime Aquino issued 84 recommendations documenting that RCSD had the second-lowest graduation rates in the state and that 54% of its schools had been identified as Priority (NYSED, 2018). A State Monitor was subsequently appointed under Chapter 56 of the Laws of 2020, and state oversight remains active under Monitor Jaime Alicea.

The present study addresses three gaps in the literature. First, no prior work has conducted a comparative qualitative analysis of resource allocation strategies across Rochester's full network of 29 charter schools, examining how individual institutions manage constrained budgets in relation to their distinct missions and student populations. Second, no study has connected stakeholder experiences (from school leaders and teachers to parents and students) to the systemic funding dynamics documented by McGee et al. (2022) and the state formula's mechanics. Third, no prior analysis has situated Rochester's charter funding crisis within the equity and adequacy frameworks established by *CFE* and the contemporary school finance literature, making the case that the state's constitutional obligation to provide a "sound basic education" extends to the nearly 9,200 students enrolled in Rochester's charter schools. This study fills each of these gaps.

III. Rochester as Case Study: Contextualizing Educational Innovation Under Constraint

A. A City Rebuilding: Industrial Heritage, Contemporary Challenge, and the Roots of Educational Innovation

Rochester, New York, is a city defined by reinvention. For more than a century, it was synonymous with American industrial ingenuity: Eastman Kodak, Xerox, and Bausch & Lomb employed tens of thousands, sustaining a broad middle class that did not require a college degree to access. A factory worker at Kodak could own a home, take vacations, and retire with a pension. The city's cultural identity ran deeper still, Frederick Douglass published the *North Star* from Rochester and is buried there; Susan B. Anthony cast her illegal ballot and stood trial in its courts. History happened in Rochester, and for generations, so did prosperity.

The unraveling came swiftly. Beginning in the mid-1980s, the digital revolution dismantled the industrial base that had defined the city's economy. Kodak, which once employed upward of 60,000 people in the Rochester area, shrank to a fraction of that. Xerox relocated its headquarters. Bausch & Lomb restructured and merged. The consequences were not distributed evenly. The suburban ring, communities like Pittsford, Penfield, and Brighton, retained their affluence and their property tax bases. The city itself absorbed the economic shock. Families who had built middle-class lives around factory employment found themselves without the industry that sustained them, and without the educational credentials to readily transition into the emerging knowledge economy. The crack epidemic of the late 1980s and 1990s compounded the damage, hitting Rochester with particular severity given its geography between New York City and the Canadian border. The confluence of deindustrialization, the drug crisis, and a contracting tax base produced cascading effects on the city's schools, housing stock, and social infrastructure that persist today.

The data bear out the depth of the transformation. Rochester's child poverty rate stands at approximately 42%, more than double the state average and ranking fifth nationally among cities of comparable size (NYS Comptroller, 2024). EdBuild (2019) identified the Rochester–Penfield school district boundary as the single most economically segregating border in the entire nation, with a 41-percentage-point poverty gap between two communities separated by a line on a map. Within the city, 91% of public school students are classified as economically disadvantaged, 47% are Black or African American, 36% are Hispanic or Latino, 22% carry disability classifications, 19% are English language learners, and 5% experience homelessness (NCES; NYSED, 2024–25). These are not merely statistics. They describe a community where the vast majority of children arrive at school carrying the weight of poverty, and where the institutions that serve them operate under resource constraints that mirror the broader economic conditions of the city itself.

Yet what is most striking about Rochester is not the depth of its challenges but the resilience of its response. The city that produced Frederick Douglass and Susan B. Anthony has not stopped producing people who believe that transformation is possible; and who are willing to build institutions to prove it. Rochester's charter school sector is, in many ways, the educational expression of that broader civic determination: a community-driven effort to demonstrate that the children of a post-industrial city can learn at the highest levels, that poverty is a condition to be addressed rather than a destiny to be accepted, and that the narrative of decline is not the only story Rochester has to tell.

B. Challenging the Deficit Narrative

Rochester's educational institutions, charter and district alike, operate within a pervasive cultural narrative that equates poverty with incapacity. The logic of this narrative is circular and self-reinforcing: the city is poor, poor children cannot learn at high levels, therefore poor outcomes are expected and explained, therefore investment is unlikely to produce returns, therefore investment is not forthcoming, and the cycle continues. Valencia (2010) has documented how deficit thinking of this kind functions not as an empirical claim but as a cultural framework that shapes expectations, resource decisions, and policy priorities. In Rochester, multiple interview participants identified this narrative as among the most formidable obstacles they face, more damaging, in some ways, than the funding disparity itself, because it erodes the political will necessary to address it.

> *"It's an incredible city with incredible culture and community. And the dominant narrative is that, well, we have this huge wealth gap and poor kids can't learn. And it's not true."*
>
> -Charter school leader

Charter school founders and leaders in Rochester have positioned their work as a direct rebuttal to this narrative. Several described their schools as "proof points", institutions designed to demonstrate, through measurable outcomes, that children growing up in one of the nation's poorest cities can achieve at levels that match or exceed their suburban and statewide peers. The evidence supporting this claim is presented in detail in Section V. What matters for contextual purposes is the recognition that Rochester's charter schools carry a burden beyond education: they function simultaneously as schools, as agents of community transformation, and as counter-evidence to a deficit ideology that shapes public perception and policy decision-making at the state level.

The deficit narrative also operates in the political arena. As one stakeholder noted, even demonstrated academic achievement has not fundamentally altered the political calculus surrounding charter school funding in Rochester. The persistence of this dynamic, in which evidence of effectiveness is met with indifference or, in some cases, used as justification for continued underfunding ("Why would we give more money to the charter schools when they're already doing well?"), reflects what Ladson-Billings (2006) described as the education debt: the accumulated moral, political, and economic deficit owed to communities that have been systematically underserved. Rochester's charter schools are working to repay a debt they did not create, with resources the state has not seen fit to provide.

C. The Educational Landscape: Two Systems, One City

Rochester's K–12 public education system now operates across two parallel structures that serve a shared student population. The Rochester City School District enrolled approximately 19,768 students in district-operated schools during the 2024–25 academic year, continuing a trajectory of decline from 36,966 students in 1998, a 47% reduction over 26 years (NYSED BEDS data; Alicea, 2024). Meanwhile, approximately 9,200 students are enrolled across Rochester's charter sector, which has grown from fewer than 2,000 students in the early 2000s to represent approximately 30% of the city's total public school population. District

projections suggest this trajectory will continue: by 2027–28, RCSD enrollment is expected to fall to approximately 18,400 while charter enrollment rises toward 9,600.

The charter sector's growth is not the cause of the district's enrollment decline, Rochester's population loss and demographic shifts are driven by decades of economic contraction, suburban migration, and the factors described above. But the sector's sustained expansion does reflect a clear market signal: nearly one in three Rochester families with school-age children has chosen a charter school, and demand continues to outpace available seats at many schools. This level of family preference, sustained over two decades, constitutes a meaningful form of democratic expression, one that the state's funding formula does not reward and, as Section IV documents, actively penalizes.

The district has faced its own significant challenges during this period. In 2018, the state appointed a Distinguished Educator who documented that the district had the second-lowest graduation rates in New York and that 54% of its schools had been identified as Priority (Aquino, 2018). A State Monitor was subsequently appointed in 2020, and state oversight remains active. These realities are noted here not to indict the district but to establish the institutional context in which both systems operate: RCSD faces structural fiscal and organizational challenges that are in many respects products of the same deindustrialization, population loss, and state policy architecture that constrain the charter sector. The difference is that the state's funding formula insulates the district from the financial consequences of enrollment decline through hold harmless protections, while actively reducing charter funding as a result of the same dynamics.

D. The Charter Sector: Many Missions, One Commitment

Rochester's charter school sector is not a monolith. Sixteen charter school organizations operate across 28 campus locations, authorized through SUNY, the Board of Regents, and local pathways, with two additional schools scheduled to open in 2026 (GoodSchoolsRoc.org; NYSED, 2025). The diversity of missions and models is itself a distinguishing feature. Among the schools in the The Summers Foundation network are rigorous college-preparatory models emphasizing structured academic environments and high expectations; community-based schools that use the city of Rochester as an extended classroom through project-based expeditionary learning; arts-integrated programs that embed creative expression across the curriculum; dual-language and culturally grounded schools designed to honor and develop students' home languages and cultural identities; and schools founded by Rochester community members who grew up in the neighborhoods they now serve, motivated by a determination to build something better for the next generation.

What unites these diverse institutions is not a single pedagogical philosophy but a shared conviction: that Rochester's children deserve schools designed around their strengths rather than organized around assumptions about their limitations. Several charter founders described their work as inseparable from the city's broader story of rebuilding. One founder, who grew up in Rochester and returned after college specifically to open a school, spoke of wanting to create a "proof point that children can learn in Rochester" and that graduates would one day "return to teach." Another described families who had walked the charter development process from its earliest days, gathering petition signatures, volunteering during the pre-operational phase, helping identify buildings; and whose children now attend the schools they helped bring into

existence. These are not institutions imposed on a community; they are institutions that emerged from within it.

The demographic composition of the charter sector reflects this community grounding. Charter schools in Rochester serve student populations that mirror or exceed RCSD's high-need characteristics: approximately 87% students of color and 97% economically disadvantaged at representative schools. This effectively refutes the most persistent criticism leveled at charter schools nationally, that they achieve results through selective enrollment or "cherry-picking" less challenging students. In Rochester, charter schools are serving precisely the students for whom the state's constitutional obligation to provide a sound basic education is most urgent, and doing so with substantially fewer public dollars per pupil than the district schools those students would otherwise attend.

The sector's scale deserves emphasis. When nearly one-third of a city's public school students attend charter schools, the sector is no longer an experiment or an alternative. It is a structural component of the city's educational infrastructure, one that parents have chosen, that accountability mechanisms have sustained, and that the state's funding formula has nonetheless failed to adequately support. The sections that follow examine, in sequence, the nature and magnitude of that funding failure (Section IV), what charter schools have accomplished despite it (Section V), the human capital crisis it has produced (Section VI), and its implications for racial equity and state policy (Sections VII and VIII).

IV. Funding Inequities: A Systematic Analysis of Resource Constraint

A. Defining and Measuring the Per-Pupil Funding Gap

Before examining the funding disparity between Rochester's charter schools and the Rochester City School District, it is important to define what is being measured and why the comparison requires methodological care. Per-pupil funding, the total public dollars spent on each student's education in a given year, is the standard metric for comparing resource allocation across schools and districts. But calculating this figure for two structurally different types of institutions involves choices about what to include, what to exclude, and which enrollment denominator to use. Different choices produce different numbers, and transparency about methodology is essential to the credibility of any comparative analysis.

Rochester's charter schools receive their public funding primarily through a single stream: the Charter School Basic Tuition (CSBT), a per-pupil payment calculated annually by the New York State Education Department and paid by the host school district. For the 2025–26 school year, the CSBT for Rochester charter schools is $14,277 (NYSED, 2025). Charter schools also receive approximately $1,000 per student in federal Title funds for targeted programs serving low-income students, English language learners, and students with disabilities. The total public funding available to a Rochester charter school is therefore approximately $15,277 per student. This figure is verifiable, stable across sources, and not subject to significant methodological debate.

Calculating per-pupil spending for RCSD is more complex, because the district's $1.117 billion budget (2025–26) serves multiple purposes and multiple populations. Several legitimate methodologies exist, and this report presents three to establish the range of the disparity before identifying the figure used as the primary reference throughout the remainder of the analysis.

Methodology 1: RCSD's Own Budget Calculation. RCSD's budget documents divide total expenditures by total enrollment of approximately 34,500 students, a figure that includes not only students attending RCSD-operated schools but also charter school students (for whom the district passes through state tuition payments), urban-suburban transfer students, parochial school students receiving transportation services, and students placed in out-of-district special education settings. Using this broad denominator, the district reports per-pupil expenditures of $30,972 for 2024–25 and $32,407 for 2025–26. This is the most conservative calculation and understates per-pupil spending on RCSD-operated schools because the denominator includes thousands of students the district does not directly educate.

Methodology 2: Federal Data (NCES). The National Center for Education Statistics reports RCSD's current expenditures per pupil at $28,608 for fiscal year 2021–22, the most recent year available in federal data. This figure uses a standardized accounting framework applied uniformly across all U.S. school districts, making it useful for national comparisons but less reflective of current spending levels given three years of intervening budget growth and inflation.

Methodology 3: Adjusted Instructional Comparison. The most analytically useful comparison adjusts the RCSD budget to isolate spending on students the district directly educates in its own schools. This requires removing three categories of expenditure that do not

represent instructional spending on RCSD-operated school students: (a) charter school tuition pass-through payments, approximately $127 million, which represent state funds the district transmits to charter schools on behalf of charter-enrolled students; (b) transportation expenditures, approximately $78 million, which serve charter, parochial, and urban-suburban students in addition to RCSD students; and (c) special education outplacement costs, approximately $175 million, which fund services for students placed in settings outside RCSD-operated schools. After these adjustments, the remaining $737 million in expenditures is divided by the approximately 20,423 students enrolled in RCSD-operated schools, yielding an adjusted per-pupil expenditure of approximately $36,086 (Rosenberger, 2025).

Each methodology is defensible within its own assumptions. For the purposes of this report, the adjusted instructional comparison (Methodology 3) serves as the primary reference figure because it uses the most recent data (2025–26 budget), isolates spending on the students RCSD directly educates, and removes expenditures that inflate the per-pupil figure without representing resources available for instruction in RCSD schools. It also produces the most honest comparison with charter school funding: charter schools do not receive the transportation, special education outplacement, or pass-through dollars that are removed from the RCSD calculation. Using this approach, the per-pupil funding gap between Rochester's charter schools and RCSD is approximately $20,809 per student ($36,086 minus $15,277). Even the most conservative calculation (NCES, at $28,608) produces a gap of approximately $13,331 per student, consistent with the $14,280 gap documented by McGee, Wolf, and Maloney (2022) using fiscal year 2019–20 data.

Three important qualifications accompany these figures. First, RCSD enrolls a higher proportion of English language learners (19%) and students with disabilities (22%) than most individual charter schools, and these populations carry higher per-pupil costs. Second, RCSD provides certain in-kind services to charter school students, including school bus transportation (approximately $78 million districtwide), school nurses, and some special education services (approximately $175 million districtwide) (Rosenberger, 2025; RCSD Adopted Budget, 2025-26), the value of which appears in the district's budget but benefits charter students. Third, the RCSD budget includes expenditures for populations that neither the district's own schools nor charter schools directly educate, such as incarcerated youth. These factors mean the $20,809 figure represents an upper bound of the gap. However, even after generous adjustment for these factors, the disparity far exceeds what contextual differences can explain. A gap of this magnitude, where charter schools receive approximately 42 cents of every dollar spent on district school students, is not a rounding difference. It is a structural feature of the funding formula.

B. How the Funding Formula Works: Structural Mechanics of the Disparity

Understanding why the gap exists requires understanding how the state calculates charter school funding. New York's charter school tuition formula, codified in Education Law § 2856, determines the per-pupil amount that each school district must pay for students who reside within its boundaries but attend charter schools. The calculation proceeds in two steps, and the lower of the two results determines the rate.

Step 1: The Growth Factor Method. The state takes the prior year's charter tuition rate and multiplies it by the district's Approved Operating Expense (AOE) Growth Factor. The AOE Growth Factor is a rolling average of three consecutive year-to-year ratios of the district's total

approved operating expenditures, calculated under Education Law § 3602(1)(t). In practical terms, this factor measures how much the district's overall spending has grown in recent years. If the district's total spending grew by an average of 3% per year, the growth factor would be approximately 1.03, and the charter rate would increase by roughly 3%. If spending was essentially flat, the growth factor approaches 1.0, producing little or no increase. If spending actually declined in one or more of the three reference years, the growth factor can fall below 1.0, producing a reduction in the charter rate.

Step 2: The Expenditure Method. The state divides the district's Total General Fund Expenditures by its total public enrollment. This produces a straightforward per-pupil expenditure figure.

The charter tuition rate is set at the lower of these two results. In virtually all cases, the Growth Factor Method (Step 1) produces the lower number and therefore determines the rate. For 2025–26, NYSED's own illustrative example shows the Growth Factor Method yielding $16,633 per pupil compared to $24,041 under the Expenditure Method (NYSED, 2025). The formula is structurally designed to select the lower of two possible funding levels.

The formula produces four compounding problems for charter schools in a city like Rochester. First, the formula tracks aggregate spending growth, not per-pupil spending. In a district experiencing enrollment decline, total spending may remain flat while per-pupil spending rises substantially. Charter schools do not benefit from the rising per-pupil spending because the formula looks only at the growth rate of total expenditures. Second, the formula excludes several categories of district expenditure from the calculation. Facilities expenditures, for example, are excluded from the approved operating expense base, yet charter schools must pay for facilities from their operational budgets, creating a cost that the formula does not recognize. Third, the formula contains no poverty adjustment. A charter school in a city with 42% child poverty receives the same formula treatment as one in a community with 10% child poverty. And fourth, the formula interacts with the Foundation Aid "hold harmless" provision in ways that specifically harm charter schools in declining-enrollment districts.

This last point warrants further explanation because it is the primary mechanism driving Rochester's unique funding outcome. The hold harmless provision, embedded in the state's Foundation Aid formula, guarantees that no school district receives less state aid than it received the prior year, regardless of how many students it has lost. Governor Hochul's Fiscal Year 2025 Executive Budget proposed eliminating this provision, which would have reduced aid to 337 districts by a combined $168 million. The Legislature reinstated it. For Rochester, hold harmless means that as enrollment declines, from 36,966 in 1998 to 19,768 in 2024–25, total state funding to the district does not decline proportionally. District spending remains near prior-year levels. Per-pupil spending rises mechanically as the denominator shrinks. But the charter tuition growth factor, which tracks the growth rate of *total* spending rather than per-pupil spending, registers this stability as flatness rather than growth. When total spending grows slowly enough, the growth factor falls below 1.0; and the charter rate actually decreases.

This is not a theoretical concern. In 2024–25, the Approved Operating Expense Growth Factor for Rochester fell below 1.0 for the first time, producing a $228 reduction in the charter per-pupil rate, from $14,316 to $14,088. This occurred in the same budget year that statewide Foundation Aid increased by $934.5 million (3.9%), and RCSD received a 3% increase in its

own state aid. The New York Charter Schools Association quantified the aggregate impact across all Rochester charter schools at $2.1 million in lost revenue (NYCSA, 2025). Rochester was the only Big Five city; and the only area in the state, where charter school per-pupil rates declined.

C. Rochester Among Peers: A Cross-District Comparison

The cross-district comparison of charter school per-pupil rates across New York's major cities provides the most direct evidence that the formula produces inequitable outcomes. Table 1 presents NYSED-verified charter school basic tuition rates for the Big Five districts and two additional comparison cities for the 2023–24 and 2024–25 school years.

Table 1. Charter School Basic Tuition Rates by District, 2023–24 and 2024–25 (NYSED Verified)

District	2023–24 CSBT	2024–25 CSBT	Change
Rochester	**$14,316**	**$14,088**	**−$228 (−1.6%)**
Buffalo	$13,966	$14,614	+$648 (+4.6%)
Syracuse	$14,128	$14,601	+$473 (+3.3%)
Albany	$17,297	$18,150	+$853 (+4.9%)
Yonkers	$17,635	$18,310	+$675 (+3.8%)
Utica	$11,883	$12,535	+$652 (+5.5%)
New York City	$18,340	$19,044	+$704 (+3.8%)

Source: NYSED State Aid Office, Charter School Basic Tuition rates (stateaid.nysed.gov/charter/). Rochester highlighted. Rochester's 2025–26 rate of $14,277 represents a $189 increase from 2024–25 but remains $39 below the 2023–24 level, a net decrease over two years.

Several features of this comparison merit emphasis. Rochester was the only district among these seven, and the only district in the state, where the charter per-pupil rate decreased in 2024–25. Every other district, including those with comparable economic profiles and enrollment challenges, saw increases ranging from 3.3% to 5.5%. Buffalo, which shares many of Rochester's demographic and fiscal characteristics as a fellow Big Five city, saw its charter rate increase by $648 (4.6%) in the same year Rochester's fell by $228.

The comparison with Yonkers is particularly instructive from an equity standpoint. Yonkers' child poverty rate is approximately 17%, less than half of Rochester's 42%. Yet Yonkers' charter schools receive $18,310 per pupil, compared to Rochester's $14,277 for the 2025–26 year, a difference of $4,033, or approximately 28% more per student. The city with 2.5 times the poverty rate receives substantially less per charter student. This inversion is not a function of deliberate policy choices about where to direct resources based on student need; it is an artifact of a formula that ties charter funding to district expenditure growth rates and contains no mechanism to account for the poverty levels, student needs, or educational costs of the communities charter schools serve.

The comparison with New York City is similarly revealing, though for different reasons. New York City charter schools receive $19,044 per pupil, $4,767 more than Rochester. New York City's charter sector benefits not only from a higher formula-derived rate but from substantial philanthropic support, larger scale economies, and a political infrastructure that has

made charter school funding a visible issue in state budget negotiations. Rochester's charter sector lacks these advantages. Its schools operate with lower per-pupil public funding, in a smaller philanthropic market, and without the political leverage that comes from representing a significant share of voters in the state's largest city.

D. The Real-Dollar Erosion: Inflation, Stagnation, and Purchasing Power

The nominal dollar figures presented above understate the severity of the funding constraint because they do not account for inflation. Between the 2019–20 school year, the reference year for the McGee et al. (2022) study, and 2025–26, the Consumer Price Index has increased by approximately 24.4%. Rochester's charter per-pupil rate over that same period has increased by approximately 0.7%, from an estimated $14,180 to $14,277. In real dollars, Rochester's charter schools have experienced a substantial decline in purchasing power: what $14,180 could buy in 2019–20 would require approximately $17,640 in 2025–26 dollars. The $14,277 charter schools actually receive represents roughly 81 cents of the purchasing power they had six years ago.

This erosion affects every line item in a charter school's budget. Teacher salaries, which constitute the largest single expenditure for most charter schools, must compete in a labor market where wages across sectors have risen substantially since 2020. Health insurance costs, which rose 14% for RCSD in the 2025–26 budget alone, apply equally to charter school employees. Building leases, utilities, instructional materials, and technology costs have all increased at rates far exceeding the 0.7% growth in charter per-pupil funding. The result is that charter schools are not merely funded at a lower level than the district; they are funded at a level that declines in real terms each year the formula fails to keep pace with inflation.

E. What the Gap Is; and What It Is Not

This analysis is grounded in an equity framework that demands clarity about what the funding disparity does and does not imply. It does not imply that RCSD is overfunded. The district faces its own severe fiscal challenges: a projected $53 million budget gap for 2026–27, health insurance costs rising at 14% annually, transportation costs projected to increase 17% in the coming year, and an enrollment decline that continuously erodes its state aid generation capacity. RCSD is not a wealthy district operating in surplus; it is a high-poverty urban district struggling with many of the same structural pressures that affect its charter school counterparts. The point of the comparison is not to argue that the district receives too much but that its charter schools receive too little.

The disparity is produced by the state's funding formula, not by any decision made at the local level. RCSD does not choose to underfund charter schools; it transmits the per-pupil amount calculated by the state. The formula's structural features, its reliance on aggregate expenditure growth rates, its exclusion of facilities costs, its interaction with hold harmless, and its absence of poverty weighting, produce the gap mechanically. The remedy, accordingly, lies at the state level: in formula reform, supplemental appropriations, or both.

The equity argument is straightforward. Nearly 9,200 students in Rochester attend charter schools. These students are overwhelmingly low-income and overwhelmingly students of color, in a city with one of the highest child poverty rates in the nation. They attend public schools that

are held to the same accountability standards as district schools, that can be closed for persistent underperformance, and that, as Section V documents, are in many cases producing academic outcomes that equal or exceed the district's despite receiving a fraction of the per-pupil resources. The state's constitutional obligation to provide all children the opportunity for a sound basic education, established by *Campaign for Fiscal Equity* and explicitly extended to Rochester, applies to these students. The current funding formula does not meet that obligation.

For the purposes of subsequent sections of this report, the adjusted funding gap of approximately $20,809 per student ($36,086 RCSD adjusted, minus $15,277 total charter) serves as the primary reference figure. Where precision requires it, the specific CSBT rate of $14,277 (state funding only, excluding federal Title funds) is used. All figures are drawn from the 2025–26 fiscal year unless otherwise noted.

V. Charter School Excellence Under Constraint: Innovation, Achievement, and the Counterfactual Question

A. Measurable Academic Achievement

Rochester's charter schools produce academic outcomes that, in many cases, equal or exceed district and statewide averages, while serving student populations that are overwhelmingly low-income and overwhelmingly composed of students of color, and while operating with approximately 42 cents of every dollar available to district schools. This is not an argument that schools should be expected to do more with less. It is evidence that these institutions have developed educational approaches effective enough to produce results under conditions of severe resource constraint, and an invitation to consider what might be possible if the constraint were removed.

On the 2023 New York State assessments, several Rochester charter schools outperformed nearby traditionally structured public schools by wide margins. One network of college-preparatory schools outperformed the district by 47 percentage points in mathematics and 22 percentage points in English Language Arts. A high-performing elementary charter achieved 75% math proficiency among its economically disadvantaged students in the same year that RCSD achieved 10% proficiency among the same demographic group (NYSED, 2023). At the secondary level, one charter school reports a 90% graduation rate while serving a student body that is 97% economically disadvantaged, compared to RCSD's district-wide average of 67%. Another school operating under charter-like autonomy reached a 78% graduation rate, with dropout rates declining from 41% to 12% under the new governance model.

These results are consistent with the CREDO (2023) findings for New York State discussed in the Literature Review, where charter students gained an additional 75 days of learning in reading and 73 days in mathematics compared to matched peers. But the local data carry additional weight because they cannot be attributed to selection effects or demographic sorting: Rochester's charter schools serve populations that mirror or exceed RCSD's in terms of economic disadvantage and racial composition. The achievement differentials documented here emerge from instructional quality, not student selection.

Not all Rochester charter schools outperform the district, and this report does not claim otherwise. The charter sector includes schools at varying levels of performance, and the accountability framework governing charter authorization in New York is designed to identify and ultimately close schools that persistently underperform. This variation is itself a feature of the model, one that several interview participants embraced explicitly.

> *"If a school isn't delivering quality, it shouldn't exist. We believe that. We hold ourselves to that standard."*
>
> -Charter school leader

The willingness to embrace this level of accountability, a consequence that district schools do not typically face, strengthens rather than weakens the equity argument. Charter schools that survive the renewal process have demonstrated sustained effectiveness. Investing in these schools is not speculative; it is an investment in institutions that have already proven their capacity to serve Rochester's students well.

B. Diverse Models of Innovation

One of the most striking findings from the field study is the diversity of instructional models operating within Rochester's charter sector. These are not 29 versions of the same school. They represent fundamentally different theories of action about how children learn best, each designed intentionally, refined through practice, and adapted to the specific needs and strengths of the community each school serves. What they share is not a pedagogical orthodoxy but a commitment to designing schools around students rather than fitting students into pre-existing institutional structures.

Structured college-preparatory models. Several Rochester charter schools operate within national networks that emphasize high behavioral expectations, extended school days, intensive tutoring, and rigorous academic preparation for college admission. One network reports 100% four-year college admission rates among its graduates, with over $3.3 million in scholarship opportunities awarded to a single cohort. These schools employ structured observation-feedback cycles, in some cases, weekly classroom observations with individualized coaching sessions for every teacher, to maintain instructional quality.

> *"I told my board that I need to be an instructional leader. I can't be worrying about ordering mulch and milk. I observe teachers. I'm in classrooms all the time. I'm aware of what's happening"*
>
> -Charter school leader

Community-based expeditionary learning. One school uses the city of Rochester itself as an extended classroom, organizing its curriculum around 12-week "Learning Expeditions" that integrate multiple subjects through community-based projects. Students conduct overnight field studies in fourth, fifth, and sixth grade. The arts are embedded across the curriculum rather than isolated as a standalone subject. This school achieved 57% reading proficiency while earning national recognition as a model school within its network. When budget reductions forced the school to consider cutting the overnight field studies, family surveys and accounting firm advisors both pushed back, the field studies were the program's identity, and the school chose to cut administrative positions instead.

> *"We were like, slash and burn those, right? Keep the people. But at some level you have to be true to the mission. So we kept the field studies."*
>
> -Charter school leader

STEAM and literacy-first models. One school founded with an explicit focus on science, technology, engineering, arts, and mathematics describes itself as "unapologetically a literacy school" in the early grades, reflecting a developmental understanding that STEAM proficiency depends on foundational reading and writing skills. The school employs a full-time speech-language pathologist who co-teaches all kindergarten literacy lessons, an investment grounded in research showing that children growing up in poverty are often exposed to smaller vocabularies in their early years. The school authored its own kindergarten curriculum when commercially available options proved inadequate for its students. Its leaders described partnerships with a local university's engineering and technology programs as a natural extension of the STEAM mission; and as a vision that adequate funding could help realize more fully.

Culturally grounded and dual-language programs. Several schools have designed curricula that explicitly honor students' home languages and cultural identities. One dual-language program serves a predominantly Hispanic community, developing bilingual proficiency as an academic asset rather than treating English language learning as a deficit to be remediated. These schools are discussed further in Section VII, but their presence within the charter sector reflects a responsiveness to community needs that the funding formula does not recognize or reward.

C. Data-Driven Practice and Tiered Intervention

A consistent theme across the field study was the intensity and sophistication of data use in Rochester's charter schools. Multiple schools described multi-tiered systems of support that begin within weeks of the school year and involve frequent, structured collaboration between classroom teachers, instructional coaches, and specialists. The speed of the data-to-intervention cycle, often measured in days rather than weeks, emerged as a distinguishing feature of the charter approach.

One school leader described a system in which, by early October, kindergarten teachers have accumulated four to five weeks of literacy group data. The school's specialists then meet with each teaching team to review the data, identify students who are falling behind, and design targeted interventions drawn from a research-based "toolbox." Families are contacted immediately and have never, in the school's experience, declined the additional support. The interventions, small-group instruction, pull-out phonics support, even informal "drive-by" flashcard sessions during arrival, are tracked continuously, with progress monitoring occurring every two weeks.

> *"We're tracking Tier 2 students, Tier 3 students, obviously your ENL and your SPED. But then we're also looking at these kids where we have 10 minutes. We can do a lot in 10 minutes with them."*
>
> – Charter school leader

Several schools described adopting curricula through a process of research, piloting, coaching, and iterative refinement that reflects the kind of continuous improvement methodology typically associated with high-performing organizations. One school piloted a new math curriculum with select grade levels, secured external coaching when initial self-directed implementation proved insufficient, and then, after seeing academic results improve markedly, expanded the curriculum schoolwide. Another school leader described spending 40 hours over winter break using artificial intelligence tools to analyze student data and redesign the school's literacy curriculum, then bringing in external literacy specialists eight times per year to work intensively with grade-level teams.

The sophistication of these systems raises a critical question about the relationship between innovation and resource constraint. March (1991) distinguishes between *exploration*, the pursuit of new possibilities, and *exploitation*, the refinement of existing certainties. Under conditions of scarcity, organizations tend to default to exploitation at the expense of exploration, optimizing current practice rather than investing in new approaches. Rochester's charter schools have, in many cases, managed to sustain both: refining existing instructional models while simultaneously experimenting with new curricula, new technologies, and new staffing

configurations. But this dual capacity operates at the edge of sustainability, dependent on extraordinary effort from individual leaders and educators. The question is not whether these schools can innovate under constraint, they demonstrably can. The question is whether they should have to.

D. Professional Development as Strategic Investment

When resources are scarce, charter school leaders described making a deliberate strategic choice: invest in people over programs. Multiple interview participants identified professional development as the highest-return investment available to them, reasoning that the quality of instruction depends more on the capacity of educators than on supplementary materials or programs.

> *"We have a summer institute, mostly done by me, it's like three weeks. And then every six weeks is a day that we bring staff into professional development. And then weekly, we have weekly observations, and then feedback meetings from those observations."*
>
> – Charter school leader

The observation-feedback model described by multiple schools represents a substantial investment of leadership time. One school leader with 14 teachers conducts weekly classroom observations for every teacher, followed by individualized 30-minute feedback meetings. This translates to roughly 10–12 hours per week devoted exclusively to instructional coaching by the school's principal, time that is available only because the school has structured its operations to protect instructional leadership as a core function. Several leaders explicitly distinguished their role from the administrative-managerial model typical of district schools, where principals may spend the majority of their time on operations, compliance, and facilities management.

The professional development approaches varied across schools but shared common features: they were practice-based, meaning teachers engaged in activities during training that they would implement immediately in classrooms; they were iterative, with coaching cycles that extended across the year rather than concentrating in one-time workshops; and they were contextually adapted, with schools drawing on external frameworks but modifying implementation to fit their specific student populations and community contexts. One school leader described the evolution of training models originally developed by a national charter network, noting that while the pedagogical techniques were exceptional, their initial implementation in Rochester sometimes produced fear-based classroom management rather than the joyful rigor the school sought.

> *"The training is one thing. The implementation, oftentimes, implementation here in Rochester came down on children as fear, like fear-based and very policing bodies. But our teachers here, their teaching is full of joy and love, and we operate differently."*
>
> -Charter school leader

This kind of contextual adaptation, taking evidence-based practices and refining them for a specific community, is precisely what the original charter school concept envisioned. It reflects what Weick (1995) describes as organizational sensemaking: the ongoing process through which

institutions interpret their environments, construct meaning from ambiguous inputs, and develop locally appropriate responses. Rochester's charter schools are doing this work in real time, and doing it well. But the capacity to sustain it depends on having enough people, paid enough to stay, with enough time to learn, all of which are functions of funding.

E. The Counterfactual Question: What Would Be Possible with Adequate Funding?

The evidence presented in Section IV documents a per-pupil funding gap of approximately $20,809 between RCSD and Rochester's charter schools. The evidence presented in this section demonstrates that charter schools are producing meaningful academic outcomes despite that gap. Taken together, these findings raise a question that the state has not yet been willing to answer: what would these schools accomplish if they were funded at levels consistent with the state's own adequacy principles?

The adequacy literature reviewed in Section II provides a framework for estimating the potential impact. Jackson, Johnson, and Persico (2016) found that a 10% increase in per-pupil spending sustained over 12 years produced 7.7% higher adult wages and measurably lower poverty rates, with effects strongest for low-income students. Jackson and Mackevicius (2024) confirmed that $1,000 in additional per-pupil spending sustained for four years improves test scores by 0.032 standard deviations. For Rochester's charter schools, where the funding gap is not $1,000 but more than $20,000, the research implies that the cumulative educational consequences of sustained underfunding are substantial; and that the marginal return on each additional dollar would be high, given the schools' demonstrated capacity to deploy resources effectively.

The field study surfaced concrete examples of what adequate funding would enable. Schools described positions they had been forced to eliminate due to the 2024–25 funding cuts: apprentice teachers who served as mentors and reduced class sizes, literacy coaches who supported schoolwide instructional improvement, culture coordinators who managed student behavior and community engagement, and special education coordinators who oversaw services for the highest-need students. One school cut a literacy coach, a culture coordinator, and a special education coordinator in a single budget cycle while serving classes of 32 students. Another school described eliminating teaching assistant positions and reading intervention programs, the very supports that the data-driven intervention systems described above depend upon.

> *"I can tell you how we do it efficiently. We have to make difficult decisions that we hope have the least negative impact on students"*
>
> -Charter school leader

This candor deserves to be taken seriously. The innovation documented in this section is real, and it is producing measurable results for Rochester's students. But it is sustained by a model of human capital utilization, low compensation, long hours, high turnover, that is neither just nor sustainable. The question for policymakers is not whether charter schools can survive on current funding levels; they demonstrably can, at least for now. The question is whether the state's interest in educational equity is served by a funding formula that requires schools serving the city's most vulnerable children to operate on extraordinary effort rather than adequate resources. The evidence says it is not.

VI. Human Capital Under Constraint: Compensation, Retention, and the Sustainability Crisis

A. The Compensation Gap: Structure, Scale, and Consequences

The quality of a school is, above all else, a function of the quality of its teachers. This is among the most robust findings in education research (Rivkin, Hanushek, & Kain, 2005; Chetty, Friedman, & Rockoff, 2014), and it applies to charter schools and district schools alike. What differs between the two sectors in Rochester is not the importance of teacher quality but the resources available to attract, compensate, and retain it. The compensation gap between Rochester's charter school teachers and their RCSD counterparts is not a minor budget line item. It is the central human capital challenge facing the charter sector; and the most immediate mechanism through which the funding formula documented in Section IV translates into educational consequences for children.

National data from the Schools and Staffing Survey show traditional public school teachers averaging approximately $53,400 in annual salary compared to approximately $44,500 for charter school teachers, a gap of 10 to 15% (Perennial Resources International, 2021). In Rochester, the local disparity is significantly wider. Charter school teachers in the Rochester area earn an average of approximately $44,801 annually, compared to $61,785 for RCSD teachers, a gap of 25–27% (NCES, 2024–25). The RCSD median teacher salary of $73,026 widens the comparison further for mid-career and veteran educators. One charter school leader described making deliberate investments to narrow this gap, offering new teachers a starting salary of $55,000 regardless of certification status, a figure that exceeds RCSD's entry-level salary of approximately $47,000. But even this school acknowledged that the comparison shifts dramatically as careers progress.

> *We pay our new teachers in year one $55,000, and that is non-certified. That's highly competitive. That's what most of our dollars go into, salaries, right? And healthcare and all that.*
>
> , Charter school leader

The salary comparison, however, tells only part of the story. Beyond base compensation, the benefits gap compounds the disparity in ways that affect long-term financial security. RCSD teachers participate in the New York State Teachers' Retirement System (TRS), a defined-benefit pension program that provides guaranteed income in retirement based on years of service and final average salary. Most Rochester charter schools do not participate in TRS. Instead, they offer 403(b) plans with employer matches, typically 3%, that place investment risk on the individual teacher rather than the institution. One school leader described having worked extensively over three years to improve compensation and retention, arriving at a pay scale that matches RCSD's base salary structure. Yet even this school acknowledged that the absence of TRS participation represents a structural disadvantage in recruiting experienced educators.

The cumulative financial impact is substantial. A teacher who spends a 30-year career in RCSD accumulates TRS benefits that can replace 60% or more of final average salary in retirement. A teacher who spends 30 years in a charter school, contributing to a 403(b) with a 3% employer match, accumulates a retirement balance that depends entirely on investment returns and contribution discipline. Over a full career, this difference can amount to hundreds of

thousands of dollars in retirement security. For educators weighing career decisions, particularly those with families, educational debt, or financial responsibilities that make long-term security a priority, the retirement gap functions as a persistent pull toward district employment, regardless of charter schools' mission alignment or working environment.

B. Turnover, Retention, and What Keeps People

The compensation gap manifests most directly in turnover rates. National research establishes that charter school teacher turnover runs approximately 24% annually compared to 14% in traditional public schools, with charter teachers 130% more likely to leave the profession entirely (Stuit & Smith, 2012). Rochester's charter sector exhibits patterns consistent with these national findings: 33% of charter teachers in the Rochester area have fewer than three years of experience, compared to approximately 20% in traditional public schools. The field study confirmed that turnover is a persistent operational challenge, with several school leaders describing annual recruitment cycles that consume significant leadership time and organizational energy.

Yet the turnover story in Rochester is more nuanced than the national statistics suggest. Multiple schools reported that once mission-aligned educators are identified and onboarded, retention improves substantially. One school leader described a workforce in which approximately 50% of staff have remained for seven to nine years, a remarkable tenure in a sector known for rapid turnover, while acknowledging that the other half of the workforce turns over with regularity.

> *"All schools have turnover. We have turnover, quite a bit of turnover. But when people come and we find the mission-aligned people, then they stay. We have a lot of people who have been here for seven, eight, nine years. But it's hard to find that right fit, and especially being a charter school and trying to recruit quality talent that is also aligned, we do our best, but we also don't always have a huge picking."*
>
> -Charter school leader

The factors that retain teachers in Rochester's charter schools, despite the compensation disadvantage, emerged consistently across interviews: a sense of mission and shared purpose; the quality of instructional coaching and professional development described in Section V; smaller, more cohesive school communities; and the experience of working in environments where leadership is visibly present in classrooms and invested in teacher growth. Several teachers and leaders described the culture of their schools, orderly, purposeful, grounded in relationships, as a form of non-monetary compensation that partially offsets the salary differential. One leader captured the tension with disarming honesty.

> *"The hardest thing about it is getting kindergarteners to read and fill the gap. And that's hard work, but that's hard everywhere. But I think when you have a solid team, and your families are on board, things are gonna come up and it's gonna be annoying. But if you have a good team, it's gonna be all right. And I don't hate my life."*
>
> – Charter school leader

The phrase "I don't hate my life" is offered here not as a punchline but as an honest marker of where the bar sits for charter school workforce sustainability. Educators who love their schools, believe in their missions, and find professional fulfillment in the work are nonetheless operating at the margins of financial viability and personal sustainability. The protective factors, mission alignment, coaching, community, are real and meaningful. But they should not be asked to compensate indefinitely for a funding formula that systematically underpays the schools in which these educators serve.

C. Workload Intensity and the Limits of Mission-Driven Labor

The extended time commitments described by charter school educators in Rochester are consistent with national research documenting 60–80 hour work weeks in the charter sector. Charter schools in Rochester typically operate longer school days and longer school years than RCSD, running from the last week of August through the last week of June with fewer breaks and no half-days. These expanded instructional calendars are a deliberate design feature, more time on task is one of the mechanisms through which charter schools accelerate learning for students who arrive with significant gaps. But expanded time for students necessarily means expanded time for the adults who serve them.

School leaders described their own work in terms that suggest a level of personal investment that extends well beyond conventional professional expectations. The leaders who conduct weekly observations of every teacher, who redesign literacy curricula over winter break, who run three-week summer institutes, who manage budgets and leases and compliance while simultaneously serving as instructional leaders, these individuals are not working standard schedules. Several described their roles in terms that blurred the boundary between profession and vocation, driven by an acute awareness that their students' needs are urgent and that the margin for error is thin.

The sustainability question is not whether individual educators can sustain this level of commitment. Many clearly can, and have, for years. The question is whether a publicly funded school system should be designed to require it. The adequacy research reviewed in Section II establishes that sufficient funding enables schools to hire enough staff to distribute the work of educating children across an appropriate number of adults. The funding formula documented in Section IV ensures that Rochester's charter schools cannot do this. The result is that the work of educating approximately 9,200 of Rochester's most vulnerable children is distributed across too few adults, paid too little, working too many hours; not because the schools are poorly managed, but because the funding formula leaves them no alternative.

D. The Diversity Paradox: More Representative, Less Compensated

Rochester's charter schools have achieved something notable in teacher recruitment: their teaching forces are more racially diverse than the national average for traditional public schools, and in many cases more diverse than RCSD's own workforce. National data show charter school teachers are 69% White, compared to approximately 80% in traditional public schools (Pew Research Center, 2024). The National Alliance for Public Charter Schools has documented larger shares of Black and Hispanic teachers in the charter sector nationally. In Rochester, interview participants consistently identified teacher diversity as both a source of pride and a strategic

priority, citing the importance of students seeing educators who share their racial and cultural backgrounds.

The paradox is that these more diverse educators are systematically compensated at lower rates than their less diverse counterparts in traditional schools. One former charter school leader described the structural dynamics with precision.

> *"It's livable for someone who's single, living with roommates, no dependents, minimal educational debt. The kind of person who can afford that is white. The charters in Rochester have done a really good job at diversifying the teacher workforce, and they are much more likely than the district schools to have teachers who resemble the students they're teaching."*
>
> – Former charter school leader

This observation surfaces a structural inequity that operates beneath the headline compensation numbers. Teachers of color are disproportionately drawn to charter schools by mission alignment, community connection, and the opportunity to serve students who share their backgrounds. Many carry greater educational debt and have access to fewer generational wealth buffers than their white peers. They accept lower compensation and fewer retirement protections not because they value these things less but because the schools in which they can do the work they believe in are the schools the funding formula has chosen to underfund. The result is what the original outline for this study described as a "non-virtuous equity cycle": Black and Brown charter school teachers are forced to work for less compensation despite working longer hours, in schools that serve predominantly Black and Brown students, funded at lower levels by a formula that contains no mechanism to recognize or remediate this disparity.

The diversity of Rochester's charter school teaching workforce is an achievement. It should be celebrated and protected. But celebrating it while maintaining the funding conditions that make it exploitative is not a coherent policy position. If the state values teacher diversity; and it has said so in policy frameworks, professional standards, and public rhetoric, then it must fund the schools where that diversity is most concentrated at levels that allow diverse educators to build sustainable careers.

E. The Funding Formula as Labor Policy

The evidence assembled in this section leads to a conclusion that deserves explicit statement: New York's charter school funding formula is, in its practical effect, a labor policy. It determines not only how many teachers charter schools can hire but how much those teachers are paid, what benefits they receive, how long they stay, and who can afford to become one. The formula does not contain provisions about compensation, retirement, or workforce diversity. It does not need to. By setting the total resource level at approximately 42% of the per-pupil funding available to district schools, it constrains every downstream decision about human capital, from starting salaries to class sizes to the number of instructional coaches to the feasibility of offering a defined-benefit retirement plan.

The consequences of this implicit labor policy fall disproportionately on educators of color serving students of color in one of the nation's poorest cities. The charter school compensation crisis in Rochester is not a market failure, it is a policy choice, made at the state

level, with predictable and documented consequences for the workforce that serves Rochester's most vulnerable children. Section VII examines how these workforce dynamics intersect with the broader racial equity implications of the funding formula.

VII. Racial Equity and Contextual Responsiveness: Intentional Design for Justice

A. The Sector's Reckoning: From Colorblindness to Identity Consciousness

The national charter school movement was not founded as a racial equity project, and for much of its history it did not describe itself in those terms. Early charter rhetoric emphasized meritocracy, high expectations, and a race-neutral language of academic excellence, the premise, as one Rochester stakeholder described it, that "what I care about is having the single best teachers in front of students," where "single best" was defined by credentials and outputs rather than cultural experience or racial identity. Colorblindness was, in its moment, understood as aspirational: the belief that treating all students identically, regardless of background, was the most equitable path forward. Rochester's charter sector was shaped by this ethos in its early years, and several interview participants described the evolution that followed as one of the most significant transformations in the sector's institutional life.

> *Colorblindness was a great thing to aspire to, right? And now we know that actually people have different experiences, and those differences really tightly correlate with their racial and ethnic background.*
>
> – Charter school leader

The shift from colorblindness to identity consciousness was not instantaneous, nor was it painless. Interview participants described a sector-wide self-reckoning that involved confronting how race-neutral policies could produce racially disparate outcomes, particularly in discipline, classification, and the implicit assumptions embedded in "high expectations" cultures. The recognition that treating all students uniformly does not yield equitable outcomes when students arrive with significantly different preparation levels, cultural backgrounds, and lived experiences required charter schools to rethink not just individual practices but entire institutional frameworks. The transformation extended across hiring, curriculum selection, disciplinary policies, family engagement strategies, and the fundamental question of who schools are designed to serve and on whose terms.

This evolution is significant because it challenges one of the most persistent critiques of the charter school movement: that charter schools, particularly those affiliated with national networks, operate as instruments of cultural assimilation that impose white, middle-class behavioral norms on communities of color (Pedroni, 2007; Scott, 2009). The critique has historical validity, some early charter models did operate in ways that prioritized compliance over community responsiveness. What the field study revealed in Rochester is that many charter schools have not only absorbed this critique but have actively restructured their practices in response to it. The reckoning is ongoing, imperfect, and unevenly distributed across the sector. But it is real.

B. From Fear to Joy: The Transformation of School Culture

Nowhere is the evolution from colorblindness to identity consciousness more visible than in the transformation of disciplinary practice across Rochester's charter sector. The earliest iterations of structured charter school culture, drawn from national networks that emphasized behavioral uniformity, silence in hallways, and rigid compliance systems, produced

environments that, in the words of one school leader, "came down on children as fear, like fear-based and very policing bodies." This language is important. It describes an institutional culture in which the tools of academic excellence were experienced by students of color as tools of surveillance and control, a dynamic that scholars of education and race have identified as a persistent feature of schooling in communities affected by both poverty and systemic racism (Morris, 2016; Shedd, 2015).

> *"The training is one thing. The implementation, oftentimes, implementation here in Rochester came down on children as fear, like fear-based and very policing bodies. But our teachers here, their teaching is full of joy and love, and we operate differently."*
>
> -Charter school leader

The distinction this school leader draws, between the pedagogical techniques themselves and the spirit in which they are implemented, is analytically precise. The observation-feedback cycles, the structured routines, the academic rigor: these are effective instructional practices. The question is whether they are deployed in service of student growth or student control. Multiple Rochester charter schools described a deliberate transition from compliance-oriented cultures to cultures grounded in relational trust, joy, and what one participant called "loving accountability." The word "joy" appeared repeatedly across interviews, not as a soft or decorative value but as a design principle. Schools described classrooms where students were visibly engaged, where laughter coexisted with rigor, and where the physical environments themselves were designed to communicate respect and belonging.

One school leader described investing in visual culture throughout the building, murals, student work displays, and thematic installations tied to curriculum, reasoning that students who qualify overwhelmingly for free or reduced lunch, many in extreme poverty, deserve to walk into something that looks beautiful and engaging. The investment was not cosmetic but pedagogical: teachers reported using hallway installations as instructional spaces, and graffiti was virtually nonexistent. The care embedded in the physical environment communicated a set of values about students' worth that no behavioral compliance system could replicate.

This transformation carries institutional costs. Developing relationally grounded, culturally responsive school cultures requires more professional development time, more careful hiring, more ongoing coaching, and more willingness to iterate when approaches produce unintended consequences. These are precisely the kinds of investments that the funding formula constrains. The charter schools that have made this transition have done so by prioritizing culture-building within their existing budgets, which means that something else, a position, a program, a resource, was foregone. The equity argument here is not abstract: the state's funding formula makes it harder for schools serving predominantly Black and Brown students to develop the culturally responsive practices those students need.

C. The Hiring Reckoning: Who Teaches Rochester's Children

Section VI documented the diversity paradox: Rochester's charter schools have more racially diverse teaching forces than the national average for traditional public schools, yet pay those educators less. The racial equity dimension of this finding extends beyond compensation to

encompass the fundamental question of what qualifications are valued, by whom, and at whose expense.

One interview participant described the charter sector's evolution on hiring with remarkable candor. In early years, the emphasis on "the single best teachers" often translated into recruitment pipelines that favored candidates with Ivy League credentials, Teach for America experience, and profiles that correlated strongly with whiteness and economic privilege. The sector's self-reckoning on this point involved recognizing that "Ivy League education is not necessarily the single best", that cultural knowledge, community connection, and the capacity to build authentic relationships with Black and Brown students and families are forms of professional expertise that elite credentials do not automatically confer.

Rochester's charter schools have responded by broadening their definitions of teacher quality to include cultural responsiveness, community rootedness, and the ability to create learning environments where students feel seen and valued. Several schools have hired educators who grew up in the neighborhoods they serve, leaders who, as one founder described, got their degrees and came home rather than leaving for opportunities elsewhere. These hiring decisions reflect an understanding, grounded in research, that representative faculty composition contributes to student engagement, family trust, and institutional legitimacy (Villegas & Irvine, 2010; Gershenson et al., 2022).

The tension, however, remains. As Section VI documented, the compensation structure that makes charter school teaching accessible primarily to those with minimal financial obligations creates demographic constraints that cut against diversity goals. Teachers of color who are drawn to charter schools by mission alignment and cultural connection must accept the same financial trade-offs, lower salaries, fewer retirement protections, longer hours, that make the work unsustainable for many. The schools have done the work of rethinking who belongs in their classrooms. The state has not done the work of funding those classrooms at levels that allow diverse educators to stay.

D. Special Education: Classification, Service, and the Question of Disproportionality

The field study surfaced a pattern in special education that warrants further investigation, though the data available are insufficient for definitive conclusions. Multiple interview participants described a dynamic in which students arriving at charter schools from RCSD had been declassified from special education services prior to kindergarten entry, despite having received early intervention services. One school leader reported that the district "pretty much declassifies most kids before they come into kindergarten," and that the school's special education coordinators attend Committee on Preschool Special Education meetings to advocate for continuity of services.

The broader concern, shared by researchers, charter school leaders, and field observers alike, is that special education classification in Rochester may be characterized by disproportionate patterns: over-classification of Black boys in certain disability categories (particularly emotional disturbance), under-identification of specific learning disabilities, and under-servicing of students who do receive classifications. These patterns are consistent with the national literature on racial disproportionality in special education, which has documented persistent over-identification of Black students in subjective disability categories and under-

identification in categories that trigger more intensive and costly services (Skiba et al., 2008; Sullivan & Bal, 2013).

Several charter schools have responded by developing their own Multi-Tiered Systems of Support (MTSS) that emphasize early identification and intervention before formal classification. The data-driven intervention systems described in Section V, where students are identified within weeks of school entry, matched with targeted supports, and progress-monitored biweekly, function as an alternative to the classification-dependent service model that characterizes much of traditional special education. One school created self-contained classrooms specifically because students with more significant needs were thriving in the school's arts-integrated environment but required a slower instructional pace. The school's response, building capacity internally rather than referring students out, reflects an institutional commitment to serving all learners within the school community.

The funding implications are significant. Charter schools that develop robust internal MTSS infrastructure, hire their own special education teachers, and build self-contained programming do so from the same per-pupil allocation that must also cover general education instruction, facilities, and all other operating costs. The district provides related service providers (speech pathologists, counselors) for classified students, and manages compliance paperwork for IEP meetings. But the instructional and programmatic work of serving students with disabilities falls primarily on the charter schools themselves, funded at $14,277 per pupil regardless of the severity or cost of the needs represented in their student populations.

E. Community Power: Family Partnership as Equity Practice

Rochester's charter schools vary in how intentionally they distribute institutional power to families and community members. Some schools have embedded family voice into governance, curriculum design, and policy development in ways that represent a fundamental departure from the traditional model of school-family relations, in which the institution decides and the family complies. Others operate more conventionally, providing information and soliciting feedback without substantively sharing decision-making authority. The variation is itself an honest finding: the charter sector is not uniformly excellent on this dimension, and the schools that are doing it well are doing something genuinely difficult.

> *Here's what we offer, and your power is being able to make the best choice for your child, knowing what we are fully transparent in who we are and what we offer. And we're never going to make anyone choose this school or stay here who doesn't want that for their child.*
>
> – Charter school leader

At its best, the charter school model positions family choice as a form of democratic power. In a city where the traditional school district has been subject to state intervention, where parents have had limited influence over district leadership decisions, and where superintendent turnover has made sustained parent engagement at the district level difficult, the ability to choose a specific school; and to leave if that school fails to deliver, represents a meaningful redistribution of authority. Nearly one in three Rochester families with school-age children has exercised this authority by enrolling in a charter school. This level of sustained family

preference, across two decades, constitutes a form of community voice that policy should respect.

Several schools described deeper forms of partnership: families who had participated in the charter petition process, who volunteered during the pre-operational phase, and whose children now attend the schools they helped create. One school described family members serving on its board of directors. Another described designing its daily schedule around family input, choosing not to adopt early dismissal days for professional development because families indicated they needed consistent full-day schedules for childcare purposes. These are not grand gestures. They are the daily practices through which institutions demonstrate whether they regard families as partners or as recipients.

The equity significance of community partnership is this: in a city where institutional decision-making has historically excluded the voices of the Black and Brown families most affected by those decisions, charter schools, at their best, represent an alternative governance model in which proximity to community is a design feature rather than an afterthought. The schools that do this work well have earned a form of community trust that no amount of state funding can purchase. But the work requires time, staffing, and organizational capacity, all of which depend on funding levels that the current formula does not provide.

F. The Convergence: Funding Inequity as Racial Inequity

The evidence assembled across Sections IV through VII converges on a conclusion that this report states directly: the underfunding of Rochester's charter schools is a racial equity issue. This is not a matter of framing or rhetoric. It is a matter of arithmetic. Nationally, charter schools disproportionately serve students of color, 26% Black compared to 15% in traditional public schools, and 33% Hispanic compared to 27% (NCES, 2016). In Rochester, the concentration is far more extreme: charter schools serve approximately 87% students of color in a city where 42% of children live in poverty. Frankenberg, Siegel-Hawley, and Wang (2011) documented that 70% of Black charter students attend schools with more than 90% minority enrollment, making charter underfunding a racial equity issue by definition.

The Education Trust's "Funding Gaps 2018" found that districts serving the most students of color receive approximately $1,800 less per student in state and local funding, and that funding gaps by race are nearly twice as large as those based on poverty alone (ERIC: ED587198). Rauscher and Fiel (2025) found that school finance reforms, while reducing income-based gaps, actually *widened* racial funding gaps in states with high segregation, a finding with direct implications for New York, where the combination of residential segregation, district boundary effects, and formula mechanics produces exactly this outcome.

In Rochester, the convergence is stark. The funding formula contains no poverty adjustment, no mechanism to account for the racial composition of the student body, and no provision to recognize the additional costs of serving high-need populations. It ties charter funding to district expenditure growth rates that are depressed precisely because the students leaving the district for charter schools are predominantly students of color from high-poverty neighborhoods. The formula then uses this depressed growth to justify a per-pupil rate ($14,277) that is lower than what less-poor, less-diverse communities receive, $4,033 less than Yonkers, $4,767 less than New York City. The result is that the students with the greatest need, in one of

the nation's poorest and most segregated cities, attending schools that are demonstrably producing results, receive the least public investment per child.

This is the structural harm that the remainder of this report addresses through policy recommendations in Section VIII. The charter schools documented in this study are not asking for preferential treatment. They are asking for the resources that the state's own constitutional framework, established in *Campaign for Fiscal Equity* and explicitly extended to Rochester, requires. The children they serve are entitled to no less.

VIII. Policy Recommendations: Toward Funding Equity for All Rochester Students

Guiding Principles

The recommendations that follow are grounded in two principles that have guided this study from its inception. The first is that every child in Rochester, whether enrolled in a charter school or in RCSD, is entitled to the resources necessary for a sound basic education, as the New York State Constitution requires and as *Campaign for Fiscal Equity v. State of New York* (2003, 2006) confirmed. The second is that increasing funding for charter schools must not come at the expense of the Rochester City School District, which faces its own severe fiscal and operational challenges. RCSD is not the cause of the charter funding gap; the state's funding formula is. The remedy, accordingly, must come from the state, through new appropriations, formula reform, or both, rather than through redistribution of resources that are already insufficient for the district's needs.

These are not competing principles. They are complementary ones. Rochester is a city where approximately 30,000 children attend public schools: roughly 20,000 in RCSD and 9,200 in charter schools. All of them are Rochester's children. All of them live in one of the nation's poorest cities. A policy framework that pits their schools against one another for shares of an inadequate pie fails all of them. The recommendations below envision a different approach, one that recognizes the state's obligation to invest in all Rochester students at levels commensurate with their needs, regardless of which public school they attend.

The recommendations are organized into three tiers: immediate actions that can be pursued within existing legislative frameworks, structural reforms that require changes to the funding formula, and longer-term investments in the institutional infrastructure that supports educational equity across the city.

Tier 1: Immediate Actions (2026–27 Budget Cycle)

Recommendation 1: Establish a Charter School Equity Supplement for High-Poverty Districts

The Legislature should appropriate a dedicated, state-funded per-pupil supplement for charter schools operating in districts where child poverty exceeds 30%. This supplement would be paid directly by the state, not deducted from district aid, ensuring that the additional investment in charter students does not reduce resources available to RCSD. The supplement should be calibrated to close at least half the current per-pupil gap over a three-year phase-in period, beginning with an estimated $3,000–$4,000 per student in Year 1. At current Rochester charter enrollment of approximately 9,200 students, this would represent a state investment of $27.6–$36.8 million, a fraction of the $934.5 million increase in Foundation Aid enacted in the 2024–25 budget alone.

Impact on RCSD: None. The supplement is funded through new state appropriation, not through reallocation of existing district aid. RCSD's Foundation Aid, hold harmless protections, and all other revenue streams remain unaffected. This recommendation adds to the total state investment in Rochester's children rather than redistributing it.

Recommendation 2: Institute a Charter Tuition Floor Tied to Inflation

The Legislature should amend Education Law § 2856 to establish a minimum annual increase in Charter School Basic Tuition equal to the Consumer Price Index for the Northeast region, ensuring that charter funding cannot decline in real terms regardless of fluctuations in district expenditure growth rates. This provision would have prevented the $228 per-pupil cut Rochester charter schools experienced in 2024–25, a reduction that occurred while statewide Foundation Aid increased by 3.9%. The floor should function as a minimum, not a cap: where the existing formula produces a higher increase, the higher figure applies.

Impact on RCSD: Neutral. The charter tuition rate is already calculated by the state and passed through the district's budget. An inflation floor modestly increases the pass-through amount in years when the existing formula would otherwise produce a real-dollar decrease. Because the pass-through is funded by state aid allocated for this purpose, the net impact on RCSD's discretionary budget is negligible.

Recommendation 3: Provide Emergency Stabilization Aid for 2024–25 Funding Losses

The Legislature should appropriate one-time "bullet aid" to compensate Rochester charter schools for the $2.1 million aggregate loss resulting from the 2024–25 per-pupil reduction. Charter advocates sought this remedy in the 2024–25 budget cycle; it was not included in the enacted budget. The loss has already forced staff eliminations, program cuts, and reduced services documented in Sections V and VI. Retroactive stabilization aid, funded through new state appropriation, would signal legislative recognition that the formula produced an inequitable outcome and provide partial relief for the educational consequences that followed.

Impact on RCSD: None. This is a state-funded supplemental appropriation directed to charter schools. It does not affect any RCSD revenue stream.

Tier 2: Structural Formula Reform (2027–29 Legislative Cycle)

Recommendation 4: Incorporate a Poverty Weight into the Charter Tuition Formula

The current charter tuition formula contains no mechanism to account for the poverty levels of the communities charter schools serve. A charter school in Rochester, where 42% of children live in poverty, receives the same formula treatment as one in a community with a fraction of that need. The Legislature should amend the formula to include a poverty-weighted supplement, modeled on the Foundation Aid formula's own need-resource index, that provides additional per-pupil funding to charter schools in districts with high concentrations of student poverty. This would bring the charter formula into alignment with the adequacy principles underlying Foundation Aid itself, as established by *CFE*. The poverty weight should be funded through new state appropriation to ensure it does not reduce funds available to the host district.

Impact on RCSD: Positive. If the poverty weight is designed consistently, the same logic should apply to RCSD's own state aid calculation, strengthening the case for increased Foundation Aid to the district. A poverty-weighted formula benefits all high-poverty schools, charter and district alike.

Recommendation 5: Decouple Charter Tuition from the Hold Harmless Interaction

Section IV documented how the interaction between the charter tuition formula and the Foundation Aid hold harmless provision creates a "no good deed goes unpunished" dynamic: as charter schools attract more students, district spending growth flattens, and the formula produces lower charter tuition increases, or, as in 2024–25, actual decreases. The Legislature should amend the formula so that the charter tuition growth factor is calculated on a per-pupil basis rather than an aggregate expenditure basis, eliminating the mechanical penalty imposed on charter schools in declining-enrollment districts. This reform would not require eliminating hold harmless for districts, a politically fraught proposition that the Legislature has repeatedly rejected; but would prevent the hold harmless provision from producing unintended consequences for charter school students.

Impact on RCSD: None. This recommendation preserves hold harmless protections for RCSD's state aid. It changes only the method by which the charter growth factor is calculated, shifting from aggregate to per-pupil measurement. RCSD's total funding and per-pupil funding are unaffected.

Recommendation 6: Include Facilities Costs in the Approved Operating Expense Base

The charter tuition formula excludes facilities expenditures from the Approved Operating Expense calculation, even though charter schools must fund their own facilities from operational budgets. District schools receive Building Aid and operate in district-owned facilities at no direct cost to their operational budgets. This asymmetry means charter schools bear a significant cost that the formula does not recognize. The Legislature should amend the definition of Approved Operating Expenses under Education Law § 3602(1)(t) to include a facilities component, or, alternatively, establish a separate per-pupil facilities supplement funded through the existing Education Equity Fund proposal (A2669), which would create a $75 million state fund for charter school capital needs.

Impact on RCSD: None. A facilities supplement or adjusted AOE base would be funded through state appropriation. RCSD continues to receive its own Building Aid through existing formulas.

Recommendation 7: Recognize the Local Economic Impact of Charter School Investment

The Legislature should consider the broader economic impact of charter school funding when evaluating formula reform. Rochester's charter schools are not only educational institutions; they are local employers, purchasers of goods and services, and tenants in commercial real estate markets. The approximately $131 million in combined state and federal funding currently flowing to Rochester's charter sector (approximately $14,277 in CSBT plus $1,000 in federal funds, multiplied by 9,200 students (NYSED, 2025; NYCSA, 2025)) supports salaries for hundreds of teachers, administrators, and support staff who live, spend, and pay taxes in the Rochester metropolitan area. Charter schools purchase instructional materials, technology, food services, building maintenance, and professional development from local and regional vendors. They lease or own facilities that contribute to the commercial property tax base. An increase in per-pupil funding of $3,000 to $4,000 per student, as proposed in Recommendation 1, would inject an additional $27.6 to $36.8 million annually into the Rochester economy (based on Recommendation 1 estimates), with multiplier effects that extend well beyond the schools

themselves. State investment in charter school funding is, in this sense, investment in Rochester's economic recovery, not merely its educational infrastructure.

Impact on RCSD: Positive. Increased charter school spending in the local economy benefits the same community that RCSD serves. Teachers, vendors, and landlords who receive charter school dollars circulate that spending through Rochester's tax base and consumer economy, strengthening the fiscal environment for all public institutions.

Recommendation 8: Establish a Rochester Education Equity Commission

The Governor should convene a bipartisan Rochester Education Equity Commission charged with developing a comprehensive plan for equitable public school funding across the city's charter and district sectors. The commission should include representatives from RCSD, Rochester's charter school sector, families from both sectors, the State Education Department, the Legislature, and independent researchers. Its mandate should be to produce actionable recommendations for formula reform, shared service models, cross-sector collaboration, and long-term investment targets that serve all Rochester students. The commission would provide a forum for the kind of both/and thinking (Collins, 1990; Smith & Lewis, 2011) this report advocates, a space where increasing charter funding and strengthening the district are understood as complementary rather than competing goals.

Impact on RCSD: Positive. A commission with this mandate would advocate for increased state investment in all Rochester schools, including RCSD. The commission's work would likely strengthen the case for addressing RCSD's own projected $53 million budget gap and the structural fiscal challenges the district faces.

Recommendation 9: Create a Charter-District Shared Services Pilot

The state should fund a voluntary shared services pilot program in Rochester that enables charter schools and RCSD to collaborate on transportation, professional development, special education service delivery, and facilities utilization. Rochester's charter schools already rely on RCSD for transportation and certain special education services; a structured shared services model could improve efficiency, reduce costs for both sectors, and create opportunities for professional learning across institutional boundaries. The pilot should be state-funded and participation should be voluntary for all parties. Successful models could be replicated in other Big Five districts.

Impact on RCSD: Positive. Shared service models can reduce per-unit costs for both charter and district schools through economies of scale. A state-funded pilot reduces the financial risk to RCSD of participating.

Recommendation 10: Invest in a Charter School Workforce Pipeline for Rochester

The state should fund a targeted teacher preparation and retention pipeline for Rochester's charter schools, developed in partnership with local universities and focused on recruiting, training, and retaining educators of color from the Rochester community. Section VI documented the diversity paradox: charter schools have more diverse teaching forces but pay them less. A state-funded pipeline that provides tuition assistance, student teaching stipends, and loan forgiveness for educators who commit to serving in Rochester's charter schools for a minimum of five years would address both the compensation gap and the diversity imperative

simultaneously. The program should be designed to complement; not compete with, existing RCSD teacher recruitment initiatives.

Impact on RCSD: Neutral to positive. A larger pool of prepared, community-rooted educators benefits the entire Rochester education ecosystem. The pipeline could be designed to serve both charter and district schools, with separate funding streams to avoid competition for resources.

Recommendation 11: Mandate Transparent Cross-Sector Funding Reporting

The Legislature should require NYSED to publish an annual cross-sector funding comparison for each of the Big Five districts, documenting per-pupil expenditures for district-operated schools and charter schools using a standardized methodology. Section IV of this report presented three competing per-pupil calculations and identified significant methodological disagreements about how to measure the gap. A state-mandated, standardized reporting framework would establish a common factual basis for policy debate, enable longitudinal tracking of funding equity trends, and allow policymakers and the public to assess whether reforms are producing intended outcomes. The reporting framework should include adjustments for student need factors (poverty, disability, English language learner status) to enable genuine apples-to-apples comparison.

Impact on RCSD: Neutral. Transparent reporting benefits both sectors by replacing competing claims with verifiable data. RCSD's fiscal challenges are better served by public transparency than by methodological ambiguity.

Recommendation 12: Align Charter Accountability with Funding Adequacy

New York State holds charter schools to rigorous accountability standards: schools must meet or exceed district proficiency rates, submit to five-year renewal reviews, and face closure for persistent underperformance. These standards are appropriate and should be maintained. However, the state must also recognize the reciprocal obligation implied by accountability: if the state demands performance, it must provide the resources that make performance possible. The Legislature should direct NYSED to incorporate a funding adequacy assessment into the charter renewal process, requiring the state to certify that charter schools have been funded at levels sufficient to meet the performance standards against which they are judged. This does not lower the bar. It ensures that the state meets its own obligations before penalizing schools for outcomes that may be attributable to underfunding rather than institutional failure.

Impact on RCSD: None. This recommendation addresses the relationship between the state and charter schools. It does not affect RCSD's accountability framework or funding.

A Note on What These Recommendations Are Not

These recommendations do not call for reducing RCSD's funding, eliminating hold harmless protections for the district, redirecting Foundation Aid from district to charter schools, or any other measure that would weaken the financial position of the Rochester City School District. This is not because such measures lack policy justification in the abstract; it is because they would harm real children in real schools at a moment when RCSD is already facing a $53

million projected budget gap and the cumulative consequences of decades of deindustrialization, population loss, and inadequate state investment.

The argument of this report is that the state can and must do both: fund charter schools at levels consistent with the constitutional adequacy principles established by *CFE*, *and* provide RCSD with the resources it needs to serve the students who remain in district schools. Rochester's approximately 30,000 public school students, charter and district alike, live in the same city, face many of the same challenges, and deserve the same commitment from the state that funds their education. The funding formula should reflect that commitment. It does not, at present. These twelve recommendations chart a path toward a formula that does.

Methodology

Research Design

This study employed a concurrent triangulation mixed-method design (Creswell & Plano Clark, 2018) to examine resource allocation, educational innovation, and funding equity across Rochester's charter school sector. The design integrates quantitative analysis of funding data and academic outcomes with qualitative analysis of stakeholder interviews, school observations, and document review. The concurrent approach allowed findings from each strand to inform, corroborate, and extend findings from the others, producing a more comprehensive understanding than either strand could achieve independently.

The study was organized around three research questions, described in Section I, that address resource management patterns within the charter sector, comparative resource allocation between charter and district schools, and the equity implications of current funding structures for historically underserved populations.

Study Context and Sponsorship

The research was conducted under a contract with The Summers Foundation. The contract, initiated in September 2025 and concluding in March 2026, provided for three phases of work: an initial resource audit and qualitative data collection (Phase 1, September–December 2025), a comparative district analysis (Phase 2, January 2026), and a final impact analysis with strategic recommendations (Phase 3, January–March 2026). The Summers Foundation facilitated access to school sites, financial documentation, staff availability for interviews, and programmatic records. The organization did not exercise editorial control over findings, interpretations, or recommendations.

Qualitative Data Collection

Semi-structured interviews. The primary qualitative instrument was a semi-structured empathy interview protocol designed to capture the lived experiences of charter school leaders, educators, and other stakeholders regarding resource allocation, program implementation, equity concerns, and observations of educational practice. Interviews lasted approximately 60–90 minutes and were audio-recorded with participant consent. All recordings were transcribed for analysis. Interview participants were purposefully sampled to represent the diversity of Rochester's charter sector across dimensions including school size, years of operation, mission focus (college-preparatory, expeditionary learning, STEAM, dual-language), organizational structure (standalone schools, charter management organization affiliates), and authorization pathway (SUNY, Board of Regents, local authority).

School and classroom observations. The researcher conducted site visits to charter schools across the Rochester sector, guided by an observation protocol that captured the implementation of curricular components, instructional practices, school culture and climate, physical learning environments, and operational systems. Observations included classroom instruction, professional development sessions, and school-level meetings where available.

Document review. The study collected and analyzed programmatic documents including charter applications, annual reports, budget documents, accountability data, strategic plans, family communication materials, and board meeting records. These documents provided context for interview and observation data and enabled triangulation of claims about resource allocation, staffing patterns, and program implementation.

Quantitative Data Collection and Analysis

The quantitative strand of the study drew on publicly available data from multiple sources: the New York State Education Department (NYSED) for charter school basic tuition rates, enrollment figures, and accountability data; the National Center for Education Statistics (NCES) for standardized per-pupil expenditure comparisons; RCSD adopted budget documents and board presentations for district-level financial data; and the U.S. Census Bureau and NYS Comptroller's Office for demographic and poverty data. Per-pupil funding comparisons employed three distinct methodologies, described and evaluated in Section IV, to ensure transparency about the range of the documented funding gap.

Academic outcome data were drawn from NYSED state assessment results and school-reported graduation and college admission rates, supplemented by the CREDO (2023) charter school performance study for New York State. Cross-district comparisons of charter tuition rates used NYSED's official charter rate publications for the 2023–24 and 2024–25 school years.

Analytical Framework

Qualitative data were analyzed through an iterative coding process informed by the study's conceptual framework, which integrates critical race theory (Ladson-Billings & Tate, 1995; Solorzano & Yosso, 2002), Collins's (1990) both/and conceptual lens from Black feminist epistemology, organizational paradox theory (Smith & Lewis, 2011), resource equity frameworks (Baker, Sciarra, & Farrie, 2018), and organizational sensemaking theory (Weick, 1995). Initial open coding identified emergent themes in interview transcripts and observation notes. These themes were refined through constant comparison and organized into the analytical categories that structure the report: funding mechanics, educational innovation, human capital, racial equity, and community responsiveness. Quantitative data were analyzed descriptively, with cross-district and cross-sector comparisons providing the evidentiary foundation for the funding analysis in Section IV.

The integration of qualitative and quantitative strands followed a convergent design: findings from each strand were developed independently and then merged at the interpretation stage to identify areas of convergence, divergence, and complementarity. Where stakeholder accounts aligned with quantitative funding or achievement data, the convergence strengthened the evidentiary basis for claims. Where they diverged, the divergence was explored and, where appropriate, discussed explicitly in the report.

Ethical Considerations and Anonymity

All interview participants provided informed consent prior to participation and were informed of their right to withdraw at any time without consequence. Audio recordings were

stored in encrypted files and will be destroyed upon completion of the project. All participants are anonymized throughout the report: interview quotations are attributed by role (e.g., "charter school leader," "former charter school leader," "school executive") rather than by name. All schools are discussed without identifying names, and descriptions of specific school programs have been generalized to the extent necessary to prevent identification while preserving analytically relevant detail.

The study's sponsorship by The Summers Foundation introduces a potential positional interest that the researcher has managed through several mechanisms: transparent reporting of all data and methodologies, presentation of multiple funding calculation approaches, inclusion of qualifications and limitations where appropriate, explicit assessment of policy recommendations' impact on RCSD, and a commitment to the both/and framework (Collins, 1990; Smith & Lewis, 2011) that refuses to advocate for charter funding at the expense of the district.

Limitations

Several limitations should be acknowledged. First, the qualitative sample, while purposefully selected to represent the diversity of the charter sector, does not include systematic representation of RCSD administrators, teachers, or families. The comparative analysis relies on publicly available district data rather than primary qualitative data collection within the district. Second, the per-pupil funding gap calculations presented in Section IV involve methodological choices about what to include and exclude; the report addresses this through transparent presentation of multiple approaches but acknowledges that reasonable analysts could reach somewhat different estimates. Third, the study was sponsored by an organization with a positional interest in charter school funding, and while the researcher exercised independent analytical judgment, readers should evaluate the findings with this context in mind. Fourth, the academic achievement data presented are descriptive rather than causal; the study does not employ the matched-comparison designs necessary to attribute outcome differences solely to instructional quality rather than unmeasured student or family characteristics.

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