

Leader and Governance Roles and Responsibilities

November 8, 2023



Role of a Charter School Governing Board

A state charter school governing board is responsible for the vision-setting, policymaking, and oversight of a local education agency (LEA) expected to provide a high-quality education to students with a multi-million dollar budget of public funding.

Charter Contract

The charter contract for a state charter school is between the SCSC and the school's governing board – NOT the school leader or any school staff. As a result, the school's governing board is responsible for the responsibilities and obligations therein.

Substantive Control

The Governing Board shall exercise substantive control over such areas as personnel decisions, financial decisions, curriculum and instruction, resource allocation, establishing and monitoring the achievement of school improvement goals, and school operations.

Holding the School Leader Accountable

- ❑ While the Governing Board must exercise substantive control over the school's mission, vision, and allocation of resources, it is the School Leader's responsibility for the implementation of the governing board's directives.
- ❑ In turn, the governing board must hold the school leader accountable for fulfilling the governing board directives.

Fiduciary Duty

A state charter school governing board has a fiduciary duty to the school – its students, staff, and community. Each member of a state charter school governing board must independently exercise his or her judgment with care, loyalty, and obedience.

Duty of Care

- Act in Good Faith
- Exercise Due Diligence
- Exercise care and skill of a reasonable, prudent person

Duty of Loyalty

- Act in the Interest of:
 - The Charter School
 - its Students
 - the Public

Duty of Obedience

- Ensure Actions Meet:
 - The Charter Contract
 - Applicable Rule and Law
 - Mission and Vision
 - Ethical Obligations

Upholding Fiduciary Duties

Revisiting the Charter Board

The Charter School Governing Board:

- ☐ Sets the Mission and Vision of the School
- ☐ Exercises Substantive Control
- ☐ Relies on the Administration to Implement the Board's Directives
- ☐ Holds the Administration Accountable for Meeting Mission and Vision of the School

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Revisiting Substantive Control

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BOARDS (GOVERNANCE)

- Evaluate school and leader
- Set goals and create metrics for measurement
- Approve budget
- Create school policies
- Know local and state charter laws
- Fundraise for the school

Enact the
school's
mission and
vision.

LEADERS (MANAGEMENT)

- Make curricular decisions
- Hire Staff
- Manage day-to-day affairs of the school
- Interact with the parents
- Report to the board
- Implement the board's suggestions and strategies

Starting Strong: Best Practices in Starting a Charter School

Marisa Cannata, Grant Thomas, Zaia Thombre

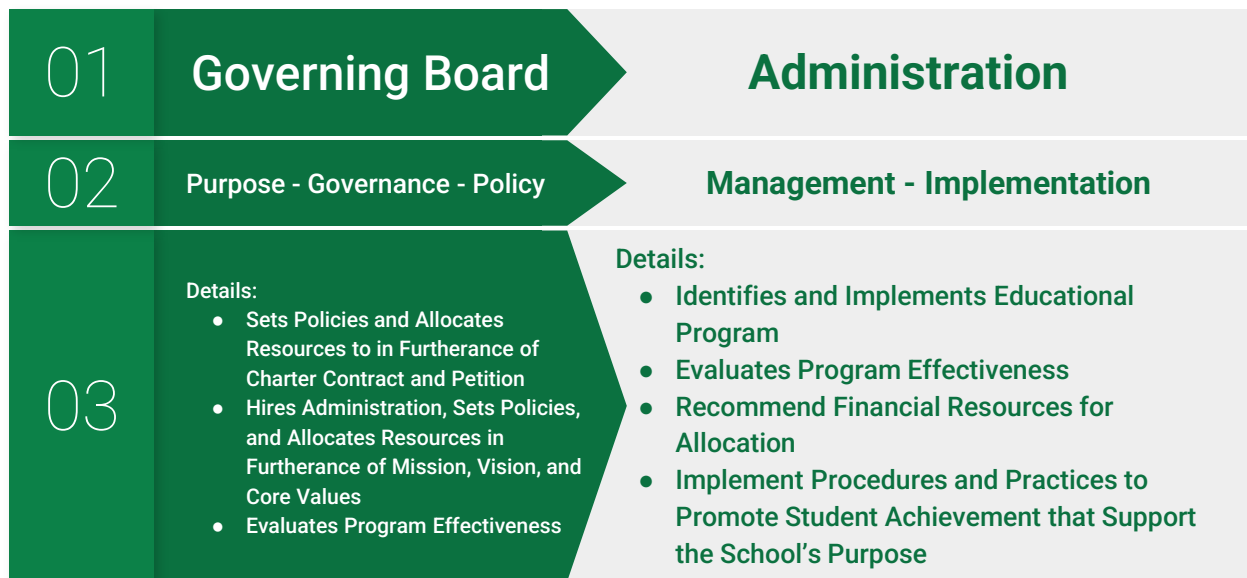
Balancing Substantive Control of Personnel



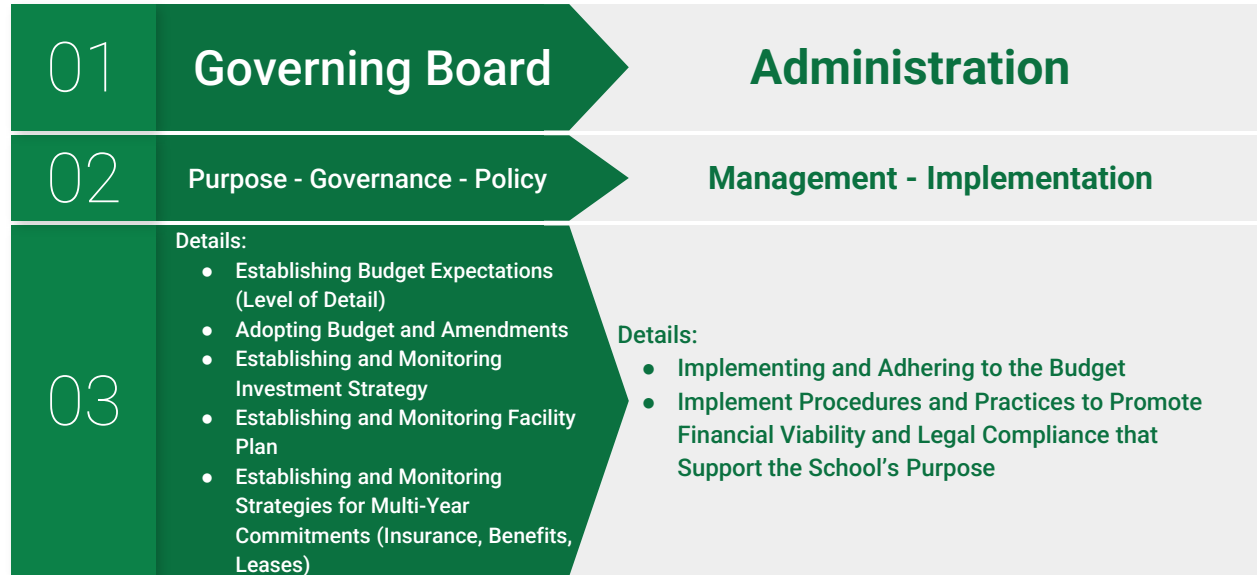
Balancing Substantive Control of Finances

01	Governing Board	Administration
02	Purpose - Governance - Policy	Management - Implementation
03	<p>Details:</p> <ul style="list-style-type: none">• Establishing Budget Expectations (Level of Detail)• Adopting Budget and Amendments• Reviewing and Approving Audits and Tax Filings• Oversight of Budget, Financial, and Legal Compliance	<p>Details:</p> <ul style="list-style-type: none">• Implementing and Adhering to the Budget• Receiving Revenue and Satisfying Expenses• Prepare and Maintain All Financial Records• Prepare and Submit All Reports and Filings• Establish, Maintain, Review, and Reconcile All Accounts• Implement Procedures and Practices to Promote Financial Viability and Legal Compliance that Support the School's Purpose

Balancing Substantive Control of Curriculum and Instruction



Balancing Substantive Control of Resource Allocation



Balancing Substantive Control of School Improvement

01	Governing Board	Administration
02	Purpose - Governance - Policy	Management - Implementation
03	<p>Details:</p> <ul style="list-style-type: none">• Sets Policies and Allocates Resources to in Furtherance of Charter Contract and Petition• Hires Administration, Sets Policies, and Allocates Resources in Furtherance of Mission, Vision, and Core Values• Evaluates Program Effectiveness• <u>Holds the Administration Accountable for Improvement</u>	<p>Details:</p> <ul style="list-style-type: none">• Identifies and Implements Needs and Solutions for School Improvement• Evaluates Program Effectiveness• Recommend Financial Resources for Allocation• Implement Procedures and Practices to Promote Student Achievement that Support the School's Purpose

Balancing Substantive Control of School Operations

01	Governing Board	Administration
02	Purpose - Governance - Policy	Management - Implementation
03	<p>Details:</p> <ul style="list-style-type: none">• Sets Policies and Allocates Resources to in Furtherance of Charter Contract and Petition• Hires Administration, Sets Policies, and Allocates Resources in Furtherance of Mission, Vision, and Core Values• Evaluates Program Effectiveness• <u>Holds the Administration Accountable for Compliance</u>	<p>Details:</p> <ul style="list-style-type: none">• Identifies and Implements Needs and Solutions for School Improvement• Evaluates Program Effectiveness• Recommend Financial Resources for Allocation• Implement Procedures and Practices to Promote Student Achievement, Financial Health, and Legal Compliance that Support the School's Purpose

Remember - The Charter Board is Unique

- ❑ Because the Concept and Operation of a State Charter School is Unique
- ❑ Therefore - The Role of the State Charter School Leader is Also...One of Kind.

Successful Charter Boards must not only balance the roles and responsibilities between the board and administration; they must also balance their roles of accountability and support.

Critical Board Objectives:

- Establish and Communicate Specific Expectations
- Clearly Define Leader Responsibility
- Communicate with Leader Openly and Often
- Delegate Authority to Implement to Leader
- Support Leader's Decision Making
- Provide Resources and Ongoing Support



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