

# Governing Board and Administrator Roles Worksheet

## How to Use this Worksheet

This tool is designed for use by a charter school that is already operating. It should be completed via a discussion by governing board members, the lead administrator, the business manager and/or other senior administrative staff, as appropriate for the charter school. The board should specify when subcommittees have a role.

The purpose of the instrument is to have a detailed discussion about roles and responsibilities and keep the documentation for future reference. The list of items is not exhaustive and may be adjusted to suit the unique needs of the charter school.

**Note:** in the chart, the word “blend” means the board and administration each have a role. In the case of blended roles, specific delineations should be noted in the “notes” column.

Task/Issue	Board	Administrator	Blend	Notes
<i>School</i>				
Maintains the vision/mission				
Implements the vision/mission on a daily basis				
Ensures compliance with the original charter				
Maintains legal status; ensures proper paperwork is filed				
Develops the strategic plan & implements it				
Monitors progress of the strategic plan				
Prepares board meeting agendas				
Prepares & distributes board packets				
Posts board meeting notices				
Maintains corporate records				
Identifies the need for new board policies				
Maintains contact with the authorizer				
Maintains relations with key community				

members				
Monitors charter school legislation				
Networks with other charter school leaders				
Records school history				
Recruits new board members				
Provides new board member induction				
Ensures adequate student enrollment				
Ensures board accountability				
Secures legal counsel when needed				
Negotiates charter contract with the authorizer				
Creates annual school calendar				
Ensures state & district waivers are valid				
Provides documentation for charter renewal				
<i>Finance/Business Ops</i>				
Creates & monitors annual budget				
Approves annual budget				
Reviews monthly financial statements				
Approves daily budget expenditures				
Arranges for annual financial audit				
Implements proper financial controls				
Develops long-range financial plan				
Makes financial decisions within the parameters of the budget				
Ensures proper insurance coverage				
Establishes/changes payroll system				
Ensures federal entitlement funds are received				
Develops job descriptions				

Guarantees staff contracts are signed				
Maintains HR files				
Establishes contracts with vendors				
Implements substitute plan				
Provides legally-required staff training				
Ensures purchasing compliance				
Provides for asset management				
Manages facility maintenance				
Pursues grants & private funding				
Establishes annual fee schedules				
Implements the school crisis plan				
Provides for risk management				
Ensures organizational efficiency				
<i>Staffing</i>				
Hires/fires instructional staff				
Hires/fires administrative staff				
Evaluates instructional staff				
Evaluates administrative staff				
Implements personnel policies What about adding the initial development of personnel policies				
Responds to parental complaints regarding staff members				
Responds to staff's complaints				
Develops staff professional development plan				
Ensures adequate communication among staff				
Ensures personnel law compliance				
Researches & implements new program ideas with staff				
Creates & implements the employee				

handbook				
<i>Academic</i>				
Sets student academic achievement goals				
Ensures educational program is in alignment with state content standards				
Ensures instructional program is effective & properly implemented				
Provides supplemental classroom resources				
Selects curriculum, including supplemental programs & resources				
Ensures compliance with IDEA & 504 laws				
Ensures adequate programming for ELL students & GT students				
Implements a comprehensive RtI program & continued training				
Evaluates school performance				
Makes adaptations to program based on data				
Ensures adequate instructional time				
<i>Parent/Student Relations</i>				
Ensures adequate communication with school families				
Maintains external community relations				
Ensures students have met enrollment qualifications				
Informs new families of pertinent information				
Creates & maintains the parent/student				

handbook				
Provides new student/parent orientation				
Communicates with the PTO				
Selects & maintains student records (hard copy & electronic)				
Provides for fair & equitable student enrollment				
Ensures parent volunteers are screened & effectively utilized				
Maintains visitor check-in & monitoring process				
Provides due process for suspended & expelled students				
Provides extracurricular, including sports, programming				

**Suggested descriptions:**

Establishes policy	Makes management decision	Takes lead role
Proposes policy	Proposes action	Takes supporting role
Recommends action	Authorizes	Informs
Schedules	Full authority	Carries out

## Example of Completed Worksheet

Task/Issue	<i>Board</i>	Administrator	Blend	Notes
Creates annual budget	Initial draft from Finance Subcmte.; presented to board in March & considered in April for adoption	Member of Finance Subcmte.	Finance Subcmte.	Finance Subcmte. includes Board Treasurer, Principal, Business Manager, parent with finance expertise; meets quarterly
Approves annual budget	Adopts in April			
Reviews monthly financial statements	Monitors	Ensures + cash flow & adherence to budget		Business Manager provides daily operations & Principal monitors Business Mgr generates the monthly statements for inclusion in board packet
Arranges for annual financial audit	Board Treasurer acts on behalf of the Board & presents motion to the Board by May meeting		Finance Subcmte.	
Implements proper financial controls	Board Treas. ultimate responsibility	Monitors implementation		Quarterly audit by Board Treasurer Business Mgr complies with financial policies & procedures while performing daily operations