

Independent School Board Duties and Responsibilities Cheat Sheet

Independent school board members care deeply about their schools and want to serve as best they can. Understanding the basic legal duties and board roles and responsibilities is the first step in achieving effective governance.



Recognizing WHY schools need boards is also important. Independent school boards do the long-term thinking and planning for a school. If they don't do this work, it may not be accomplished or it will take the administration's time. It is imperative that boards focus on these duties and responsibilities so that the head can focus on running the school.



Modern independent school boards have moved beyond focusing on "time, treasure, and talent" when looking for board members. While all three remain valuable, effective boards also require regular engagement, critical thinking, collaborative problem-solving, and sharing connections.



Successful, effective boards are a result of well-informed, actively engaged, and strategically focused board members.

Individual Board Member Duties reflect the basic legal expectations of each board member.

Duty of Care: Actively participate in making decisions on behalf of the school while using best judgment; take reasonable care of the school by ensuring prudent use of all assets, including facility, people, and goodwill; provide oversight for all activities that advance the school's effectiveness and sustainability.

- a. Show up- attend meetings regularly
- b. Be prepared and participate- read reports, ask questions
- c. Be knowledgeable about the school- understand the mission, programs, strategic goals, strengths and weaknesses, financial standing

Duty of Loyalty: Each board member must put the interests of the school before their personal and professional interests when acting on behalf of the organization in a decision-making capacity.

- a. Discuss and sign Conflict of Interest statements annually
- b. Remember to quiet your "parent" or "teacher" hat when you are acting as a board member
- c. Recuse yourself when appropriate

Duty of Obedience: Board members bear the legal responsibility of ensuring that the school complies with the applicable federal, state, and local laws, including filing 990s, and adheres to its mission.

- a. Be knowledgeable about the board- understand your roles and responsibilities
- b. Read and understand the board's bylaws- and follow them
- c. Address potential legal issues

Board Responsibilities reflect the regular work of the board; those areas which must be addressed effectively and consistently for the organization to succeed and thrive.

Take Responsibility for the School's Mission and Purpose: The board creates, regularly reviews, oversees alignment, and communicates statements of mission, purpose, and/or philosophy.

Select, Support, and Evaluate the Head of School: The board articulates the head of school's responsibilities and undertakes a careful search to find the most qualified individual for the position. The board ensures that the head of school has the personal and professional support needed and that the head receives regular performance feedback.

Ensure Adequate Financial Resources and Provide Financial Oversight: Board members fully understand and regularly monitor the school's financial standing in order to ensure that adequate financial resources are in place for the sustainability of the school. The board also ensures that proper financial controls are in place.

Ensure Effective Planning: The board actively engages in regular strategic thinking as well as in long-range planning and assists in implementing and monitoring the school's strategic goals.

Ensure the Maintenance and Health of the Board: The board recruits appropriate candidates for board membership (to represent a diversity of thought & perspective and to reflect the community's constituents), fully orients new members, and periodically and comprehensively evaluates board member and board group performance.

Monitor and Strengthen Programs and Services: The board ensures that the programs and services provided by the school reflect and effectively achieve its mission. The board does not manage or direct the programs but oversees their effectiveness.

Ensure Legal and Ethical Integrity: The board adheres to legal standards and ethical norms and understands and regularly reviews its own bylaws.

Actively Engage in Development: The board takes a leading role in fundraising and developing ongoing supporters of the school.

Conditions for Effective Board Governance

The board speaks with one voice. Healthy debate is essential during board deliberations and decision-making. Yet when outside the board room, members speak with one voice. This includes refraining from talking with non-board members (parents, teachers) in a board capacity.

Diversity of thought leads to the most effective decisions. Boards actively recruit, train, and support members who will add needed perspectives as well as reflect the community's constituents.

The board chair-head relationship is critical to the health of the school. Intentional care is given to the board chair-head relationship so that it may thrive.