

Job Descriptions for Charter School Board Officers

Board Chair

Overview

Every charter school board should have a full slate of officers at all times to maintain consistent leadership and clarity of roles. Charter school boards can use the familiar board officer structure—board chair, vice chair, treasurer, and secretary—that most nonprofits use. The board chair leads this officer team and leads the full board. It is important that all board officers are committed, engaged, and sufficiently informed to govern effectively and participate fully. Most importantly, every board must have a strong, well-trained board chair.

The process for selecting and installing officers should be contained in your board's [bylaws](#). Having thoughtful job descriptions for every officer helps set high expectations and ensures that the board selects people with the right characteristics, experience, and expertise for the roles. This tool provides a job description for a charter school board chair.

The board chair assumes responsibility for the overall functioning of the board. He/she facilitates board meetings, oversees the work of the committees, and works most closely with the school leader. Often, the board chair also has special authority (e.g., sign checks, approve contracts, etc.).

The board chair also plays an extremely important role on the interpersonal side of the board. He/she must be responsive to other board members' views, maintain a collegial atmosphere, manage different personalities and perspectives, and work hard to foster a trusting yet candid relationship with the school leader. The board chair must be a strong communicator and a skilled facilitator.

This can take time, sometimes require training, and be frustrating, however, interpersonal dynamics can often make or break a board. Ultimately, the board chair must monitor and



nurture positive dynamics by creating an environment in which board members feel engaged, included, respected, and able to make a positive contribution.

Responsibilities

A charter school board chair coordinates the full board's activities so the board achieves its goals and operates in accordance with its bylaws.

Overarching Duties

- › Ensures that the board is functioning effectively and meeting high standards for effective governance
- › Holds the board accountable for executing key board functions
- › Facilitates all meetings of the board and other meetings or events as necessary
- › Develops board meeting agendas in partnership with the school leader that reflect the school's and board's priorities, drive strategic conversation and decision making, and keep the board's work focused on the goals
- › Makes sure that the board conducts a self-assessment each year and addresses areas for improvement
- › Leads the discussion on planning board retreats

Committee Work

- › Sets clear expectations for committee operations and communication with the board
- › Holds committees accountable for achieving their annual goals
- › Appoints committee and task force chairs, and assigns members to committees

School Leader Relationship

- › Builds a constructive, candid relationship with the school leader
- › Participates in regularly scheduled check-ins with the school leader to discuss strategic issues, monitor progress toward goals, and identify opportunities where he/she needs support from the board
- › Guides the board through the process of hiring, evaluating, and supporting the school leader



Compliance

- › Serves as the main point of contact with the authorizer
- › Ensures all board actions and board members meet and understand legal and ethical compliance standards
- › Shares all relevant information from the authorizer with the full board

Leadership Skills

- › Models effective networking with community members and stakeholders by serving as the board's ambassador
- › Champions diversity and inclusion on the board
- › Supports and recognizes board members who make positive contributions to the board
- › Takes the lead in removing board members who are persistently disruptive or disengaged

Communication

- › Respects and engages every board member while encouraging an open and constructive line of communication
- › Is approachable, available, and responsive
- › Makes sure that each board member has a clear role to play on the board
- › Listens and communicates well, including being available for conversations after hours and on weekends when necessary



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Vice Chair

Overview

The vice chair of a board is essentially the board chair's understudy and second in command. In the event that the board chair is absent, temporarily unable to perform his/her responsibilities, or permanently unable to continue in the position, the vice chair acts as the board chair. Under normal circumstances, the vice chair assists with the overall functioning of the board and serves as an advisor and deputy to the chair. An active and engaged vice chair with clear roles and responsibilities can be a tremendous asset to a charter school board, as he/she can share the workload that typically falls solely on the chair's shoulders (a hardship that frustrates recruiting a strong board chair).

On some boards, the position of vice chair is a chair-elect position, which means that after serving for one or two years, the vice chair automatically moves into the chair role. Because this process is not uniform across all boards, the bylaws should clearly outline the process for board chair succession.

The process for selecting and installing officers should be contained in your board's [bylaws](#). Having thoughtful job descriptions for every officer helps set high expectations and ensures that the board selects people with the right characteristics, experience, and expertise for the roles. This tool provides a job description for a charter school board vice chair.

Responsibilities

The vice chair helps the board chair lead the full charter school board to achieve its goals and operate in accordance with its bylaws. The vice chair also:

- › Attends all board meetings



- › Executes specific projects at the request of the board chair¹
- › Helps the board chair develop and implement officer transition or succession plans
- › Understands the responsibilities and duties of the board chair, and is ready and prepared to stand in for the board chair as needed
- › Actively recruits new board members, and helps to retain current board members
- › Provides leadership and direction to the board in concert with the board chair
- › Ensures transparent communication between all board members



¹ This could mean chairing an ad hoc committee, providing extra support to a flagging committee, monitoring committees' progress toward their goals, and/or leading the process for the evaluation of the school leader.

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Secretary

Overview

The secretary of a charter school board has responsibility for communicating with board members about meetings, recording and maintaining minutes of all meetings, keeping all board records and important documents, and upholding legal compliance in matters of reporting and transparency. He or she also maintains legal and other organizational records for the charter school, such as charter school bylaws and the charter agreement. Overall, the secretary is responsible for ensuring that accurate documentation exists to meet legal requirements and for the authorizer “to determine when, how, and by whom the board's business was conducted.”¹

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Responsibilities

The secretary supports the board's organizational needs so the board achieves its goals and operates in accordance with its bylaws in the following areas:

- Keeps accurate minutes for each board meeting (see CBP's [Meeting Minutes](#) tool)
- Shares minutes with the board in a timely fashion
- Ensures that minutes are approved by the board in a recorded vote

¹ Nathan Garber et al, "Secretary of the Board of Treasurers Job Description," *Nathan Garber & Associates*, last accessed 2014, http://www.garberconsulting.com/Job_Description_Secretary.htm.



- › Makes sure the board adheres to open meeting laws and other legal requirements
- › Assumes responsibilities of the chair in the absence of the board chair and vice chair
- › Provides notice of board and committee meetings to all board members (we recommend using calendar invites as well as emails and reminders)
- › Keeps all legal and official documents up-to-date
- › Maintains the board's records and archives for future reference by board members, the authorizer, and others



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Treasurer

Overview

The treasurer of a charter school board oversees all matters related to the school's finances, property, and budget. At Charter Board Partners, we often use the terms treasurer and finance committee chair interchangeably—board members who serve as treasurer typically chair the finance committee, although not always. This leadership role requires the treasurer to be knowledgeable about standard financial and accounting practices; align all financial transactions with the mission, goals, bylaws, and legal requirements of the school; and provide the information needed for all board members to make financial decisions for the school. Ideally, the treasurer has a strong working relationship with the school leader as well as the school's chief financial officer (CFO). He or she also oversees the school's leadership in the areas of money management and compliance.

The process for selecting and installing officers should be contained in your board's [bylaws](#). Having thoughtful position descriptions for every officer helps set high expectations and ensures that the board selects individuals with the right characteristics, experience, and expertise for each role. This tool provides a job description for a charter school treasurer.

Responsibilities

A charter school board treasurer directs the board's financial work so the board achieves its goals and operates in accordance with its bylaws in the following areas:



Leadership

- › Serves as the chair of the finance committee, and leads the committee in setting and meeting annual goals
- › Ensures that all members of the board fully comprehend the financial matters of the school and receive reliable and timely information regarding those matters
- › Works with the finance committee, school leader, and CFO in leading the development of an annual school budget and presenting the budget to the full board for approval

Accounting & Reports

- › Understands financial accounting for nonprofit organizations or charter schools
- › Works with the CFO or other appropriate school leadership to deliver accurate and complete financial reports to the board on a regular basis
- › Keeps all records of school accounts current
- › Oversees and reviews the annual audit process

Ethics

- › Handles all work related to school's financial affairs with integrity and care
- › Remains apprised of legal and ethical requirements for the position

