

# speaking notes

## Role of the Board of Trustees in one of the world's best education systems

The Calgary Board of Education is a learning organization. It is one of the best education systems in the world. More than 104,000 students learn in our schools and from people who number among the best educators in the world.

Our learning extends to the work of the Board of Trustees as well. In 2007 the Conference Board of Canada recognized the Board of Trustees for its governance excellence. Building on that success, we are committed to continuously learning and improving.

Citizens of Calgary elect trustees to govern the Calgary Board of Education. The philosophy of school board governance is that government is most effective when it is close to the people being governed.

(As an aside, I would just like to point out that approximately one year from now, on October 21, 2013, a new Board of Trustees will be elected. Now is a good time to start thinking about should you run for a trustee in that election? Do you know others who would make a good trustee? Certainly in the upcoming months there will be additional opportunities to learn more details about the election, and I encourage you to think about how you could be involved. The Alberta School Board Association will be sponsoring very informative sessions on becoming a trustee, and the Board will facilitate the provision of information as much as possible).

Tonight I would like to speak briefly about what we, as a school board do, and how that might impact you in your role as a representative of your school.

The provincial legislature makes laws that govern education and what boards can and must do. The board practices leadership through governance in three main areas:

- fiduciary leadership;
- strategic leadership and
- generative leadership.

In its *fiduciary leadership* role the board focuses on its legal responsibilities as defined in the School Act, regulations and other legislation pertinent to children and youth.

learning | as unique | as every student



**Calgary Board  
of Education**

The board provides oversight and stewardship to ensure:

- each student has the opportunity to achieve his/her potential
- children are safe at school
- the jurisdiction's financial and capital resources are well managed; and
- that business is conducted in a legal and ethical manner

The school board's *strategic leadership* role sees school boards looking into the future – conducting environmental scans of internal and external issues and trends. In this role, the school board reviews, revises or drafts the school jurisdiction's mission, values, vision and goals. This role involves planning and making decisions about resources, programs and services that reflect long term priorities.

The school board's *generative leadership* role is grounded in the notion that "it takes a whole village to raise a child". It recognizes that governance should not exist in isolation, but that it should engage the community.

In its generative leadership role, the school board reaches out to involve the community in a dialogue about the needs of the community, its youth and the future. Moving beyond consultation, generative leadership suggests that school boards share direction-setting and sometimes decision-making with others. This role increases education's profile as a fundamental community resource and it gives all citizens an opportunity to shape the direction that education takes locally.

The school board is an *advocate for public education and for the local school system*. As an advocate, the school board consults with its constituents; it provides advice with respect to education to MLAs and government as an individual board and collectively through the Alberta School Boards Association. School boards also *advocate for students*. The board assesses proposed policies based on what is best for the development of the whole individual. While schools cannot usurp the family's role, serving on a school board means partnering with parents to ensure children are provided with the best possible educational opportunities to become productive citizens who contribute to their communities.

CBE Trustees spend a lot of time meeting with parents, students, employees and others who care about public education. Understanding the community is not something else Trustees do, it is integral to everything we do every day.

Our governance model recognizes the need to engage the community to gain feedback. We are trying to improve our governance for students and taxpayers. The *School Act* says it's a Board's job to develop governance policies. We have done that. As we move forward, we will invite feedback to help us understand whether we are achieving our objectives. Based on what we learn, we will move forward, and strive to continuously improve.

The school board, as a representative of the people, is a *decision-maker* and *direction-setter*. The board integrates information from many sources; processes that information; evaluates it and makes a decision compatible with the system's beliefs, values and goals.



As it makes these decisions, the school board considers the interests of all the students in the jurisdiction – not just the interests of students from a particular school or area.

The school board is responsible for *setting the overall* direction for the school system. The school board sets the annual budget which determines how resources are allocated to schools and programs. The school board also provides direction through its governance policy processes. These include *planning, developing, implementing and evaluating policy*.

The school board also *holds the system – and the board itself – accountable* for achieving its goals. The board creates this accountability by assigning roles and responsibilities for the desired results and creating a system to monitor and evaluate those results. The school board reports system and school performance to the public and to the provincial government.

Last year, the Trustees agreed that we would all work together to review the work that we do and how we work together to oversee, govern and focus the performance of the Calgary Board of Education.

It is critical that the school board creates the appropriate policies *to ensure the appropriate conduct of the school system and the* limitations of delegated responsibilities or powers.

Governance is not management and certainly not micro-management. As Trustees we govern the CBE. That means we set the ultimate objectives for the organization and—of course—our students. The new governance model calls these “results.” Indeed, one reason why we moved to a new governance model is that it is easier for everyone to understand. Everyone includes trustees, administration, employees, students and parents.

While legislation gives the school board the power to engage in a wide range of activities, it is expected that school boards will delegate operational tasks to the superintendent. School boards tend to focus on governing the system by setting performance targets and holding the system accountable for the desired results. Ultimately the board is accountable.

The school board *selects a superintendent of schools, delegates administrative duties to the superintendent and evaluates the superintendent’s performance*. The school board clearly outlines its expectations of the superintendent. In this context job descriptions must be based on outcomes or accomplishments rather than activities.

The relationship between the school board and the superintendent is the most important relationship in the school system. The school board and superintendent have different but complementary roles in many areas. Each party’s success is greatly influenced by the other’s success. Both parties must nurture this relationship. The school board must clearly establish the roles and responsibilities of the school board, the school board chair and the chief superintendent.

As Trustees, we also set boundaries for how our results can be achieved. In our new governance model, these are called “operational expectations.”

The Calgary Board of Education uses a model of governance called “Coherent Governance,” created by an organization called the Aspen Group. Aspen is a leader in governance with special expertise in education. The Aspen group defines operational expectations (OE) this way:

“The board wants to remove itself from preoccupation with the day-to-day operation of the organization. But yet, it has concerns about those operational matters that it must express in order to represent and serve the interests of the ‘owners’ of the organization on whose behalf the board does its work.”

In addition to the results and the operational expectations, the governance policies include clear delegation of work to the Chief Superintendent of Schools and governance culture. Governance culture clearly states how Trustees are expected to behave individually and collectively.

The school board is a corporation. If the school board chooses, it may delegate a trustee to perform specific duties as an individual; but only as an agent of the board and only as prescribed by the board, by board motion.

In other words, the school board is ultimately responsible for the individual’s action. With this exception, a trustee acting on his or her own has only the authority and privileges of an ordinary citizen. All authority delegated by the province is to the corporate school board; not to individual trustees.

## **Closing**

It is our Board’s hope that tonight will be a learning experience for everyone, and with your assistance, we can all become better at meeting the needs of our community. As representatives of your schools, you have valuable insight regarding your local needs and successes, and we look forward to hearing your suggestions in ongoing conversations. It is our hope that tonight will be only the beginning of these conversations.

We all need to be reminded that the real value of this work is what it means for how we educate tomorrow’s students today.

## **For more information about**

- 1 | Aspen Group of governance experts  
<http://www.aspengroup.org/home.html>
- 2 | Governance policies of the CBE Board of Trustees  
<http://www.cbe.ab.ca/policies/governance.asp>

The information in this speech has been adapted from the Alberta School Boards’ Association “Welcome aboard: Serving on a school board – a guide to trusteeship and school boards”. (Published 2010)

**For further information, you can read the entire document at**  
<http://www.asba.ab.ca/files/pdf/trustee-handbook/elected-trustee-handbook.pdf>