Role of the School Trustee

Adopted 1983 Annual Convention

"In and for each Province the legislature may exclusively make law as in relation to education."

Constitution Act 1867

The Alberta Legislature, through The School Act, has delegated much of its authority for the governance of education to locally elected school boards. School boards are agents of the legislature and, as such, have certain obligations to perform and certain powers to carry out their tasks. In keeping with the theory that government is most effective when it is placed closest to the people being governed, local people elect trustees to act for the legislature in the local community. In this sense, the trustee is the bastion of democracy: government for the people, by the people.

School boards exist for children. In addressing matters related to their mandate, trustees must at all times be the children's advocate. Educational policies must be judged first on what is best for the development of the whole child. While schools cannot usurp the role of the family, trusteeship means being partners with parents in ensuring that children, our greatest natural resource, are provided with the best possible educational opportunities to become the future citizens the community wishes them to be.

A key element in the provision of educational services is the teacher. Trustees recognize the important role of teachers and school administrators in translating policy into educational practice. The contribution of other employees of the board is also recognized as being a critical component of the provision of services to students.

The school board is a corporation. When board members act according to proper procedures, their acts are the acts of the corporation. When given the corporate authority to act on behalf of the board, a trustee may carry out certain duties individually, but only as an agent of the board. In other words, the board is responsible for that action. At all other times, the board member acting individually has only the authority and privileges given the ordinary citizen.

The trustee, as a representative of the people, is a decision-maker, one who must integrate the information from all the forces which impact on trustees, process that information, evaluate it, and make a decision compatible with his/her own beliefs, values, and knowledge. Such is not an easy task. In arriving at decisions and working within the framework of the school board, the trustee assumes a number of roles.

These roles are not listed in order of priority.
- Politician
- Goals Setter
- Planner
- Financial Planner
- Policy
- Legislator
- Communicator
- Education
- Information Receiver
- Information Disseminator
- Adjudicator
- Lobbyist
**Politician**
Trustees as policy-makers and legislators are politicians, not by the common definition associated with partisan politics, but as members of a governmental unit charged with the responsibility of conducting the affairs of the school jurisdiction. They are responsible to their electorate through the democratic process.

The political process is that by which a community makes decisions about its goals, priorities, processes, and allocation of resources, and the means by which it will resolve its conflicts. A politician is an important part of this process, elected and accountable to the community, which is the very essence of democratic government. Webster's dictionary defines politician as "one versed in the art of science of government, especially one actively engaged in conducting the business of a government." The business of the school board is to provide educational services to the students of its community.

**Goals Setter**
The trustee, through the board, provides leadership to the system by setting goals, statements of purpose, and direction, which serve to identify the results the board wishes the system to achieve. If a board is not continually studying its community and society's needs, the school system will continue to educate its students in a manner that prepares them better for the past than the future. It is the trustee's responsibility to ensure that education stays in step with today's world and is ready for the world of tomorrow.

**Planner**
To guide the system toward the achievement of its goals, the board must plan the allocation of its resources. The trustee, as planner, will be faced with setting priorities in light of community wishes, available resources, and sound educational practice. This planning will necessitate the delegation of duties to the district administration and staff. The quality of planning will determine the success of goal achievement.

**Evaluator**
The trustee, as evaluator, must ensure that policies are within the parameters of the board's authority, consistent with goals, compatible with other policies, implemented in a fair and just manner, and effective in achieving intended outcomes. Trustees evaluate the chief executive officer. The trustee is constantly evaluating the information received before decisions are made. Trustees must constantly appraise the system to determine its present development relative to expressed activity that allows the trustee to assess the total system and make adjustments when necessary.

**Financial Planner**
A school board operates within specific financial parameters. The trustee recognizes that the wishes of all cannot be realized, and that astute financial planning is an essential part of trusteeship. The role of the trustee is to assess the needs of the system, and to decide what can be achieved with the resources available. The annual budget is a statement to administration and the public that the board is accountable for the dollars spent. It reflects not only the board's priorities in terms of the educational program, but also the blending of the needs and wishes of staff, community, and special interest groups. In the eyes of the public, the adoption of the budget is perhaps the single most important decision a school board makes. It is an opportunity for the trustee to demonstrate to the electorate the willingness and ability to shoulder the responsibility that comes with being a member of the school board.

**Policy**
A responsibility of the trustee, through the board, is to develop policy that will guide the administration and other employees toward achieving district goals. Policy-making requires recognition of the need for specific policies and often the anticipation of that need. Policies create the framework within which the staff perform their duties. The trustee, as policy-maker, recognizes that the task of implementing policy is delegated to the chief executive officer. Policy development is also a process that allows for systematic review by trustees of the district's objectives and plans.
Legislator
Many acts of a school board have the status of law in a jurisdiction. When a board sets the school year or develops a policy on corporal punishment, these actions are laws that govern the conduct of students and staff. Other board actions directly impact members of the public. The trustee, as legislator, must carefully consider the effects the Board's laws will have on all the members of the community it serves.

Communicator
To effectively meet the responsibility of trusteeship, the trustee must be a communicator, one who will interact effectively with the many publics who have a stake in education. The electorate must be made aware that their concerns and wishes will be heard and, in turn, must be informed as to the actions taken to deal with them. Effective communication is essential between board members as, in reality, the corporate decision determines the actions of the district.

Expectations need to be clearly communicated to staff. Different points of view must be presented, considered, and evaluated. In short, communication is an integral part of trusteeship, a necessary skill and a critical obligation.

Education
Schooling is one of the most important activities that any community undertakes. The role of the trustee is to keep the positive image of schooling before the community, both to ensure that it is given a high priority by the public, and to keep the community aware of its accomplishments. The image must be tempered by reality, because the image is not only presented for the purpose of enhancing the reputation of schooling in general, but also for the purpose of identifying and solving problems when necessary.

The changing role of the family impacts directly on the educational needs of children, and the changing Canadian society results in both rising and diverse expectations for schools. Trustees must recognize that the health, welfare and social needs of children are prerequisites to effective learning, and where these needs cannot be met within the parameters of the educational program, trustees must be the children's primary advocates to ensure that more appropriate agencies meet their needs. Trustees, together with health, welfare, and social agencies, should identify those services that are the responsibility of the school system, those that can be shared, and those that are clearly the responsibility of other agencies.

Information Receiver
Good information forms the basis for sound decisions. Trustees often utilize the board's staff through their executive officer to research information; however, only the corporate board has the right to demand information. The public may provide input and also receive information through formal procedures established by policy, attendance, and participation at board meetings, surveys prepared by staff, and informal contact with trustees and staff. Good information may also be available from fellow trustees from other districts that have considered similar problems. The Alberta School Boards Association provides services to trustees by organizing workshops and seminars and by providing boards with consultative services in legal, educational, labour relations, and communications matters upon request.

Information Disseminator
Decisions made at the board table must, in turn, be communicated through procedures established by board policy. A trustee may be expected to communicate these decisions on a less formal basis to those affected by the decisions. Good communications policy will identify those occasions when an official board spokesman will deal with issues and announcements.

Adjudicator
Policy implementation is usually delegated to the board's administrative staff. From time to time, staff members, parents, students and other members of the community may appeal to the board if they feel decisions and/or the procedures used affect them in a prejudicial manner. The trustee, as an adjudicator, must set aside personal concerns and make judgments that are perceived by those concerned to be fair and just. The board may also delegate to a committee the task of adjudicating policy disputes. As a member of such a committee, the trustee's role is determined by the powers granted the committee by the board. Sound policy-making procedures can minimize the number of occasions when the trustee is called upon to act as an adjudicator.
Lobbyist
The term 'lobbyist' defines the trustee's role as a communicator to all levels of government. The trustee, as lobbyist, will ensure that the voice of the local community will be heard by those who have the power to keep education high on the list of government priorities. Local governments and individual members of the Legislative Assembly can be key allies for trustees. Collectively, through the Alberta School Boards Association, trustees can have a significant impact on the decisions made pertaining to education. In cooperation with other groups, they can work to ensure that the accomplishments of education are kept before the public. Trustees should not adopt an insular view, but an important aspect of trusteeship is the lobbying of fellow board members to ensure that local as well as system needs are fulfilled. Good communications skills are prerequisites for successful lobbying.