



## Trustee and Governor Schools Visit Policy

<b>Review Due:</b>	September 2026
<b>Last Review</b>	September 2023
<b>Applicable to:</b>	All Trust Schools
<b>Reviewed By:</b>	AC
<b>Approved By:</b>	Board of Trustees September 2023

### Comments:

This policy has been reviewed in line with the requirement to revisit the document every three years. Minor changes were made to reference updated guidance and provide clarity around the types of visit. Appendices were also added to provide template monitoring forms. The policy reflects current government guidelines.

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The Partnership Trust have agreed this policy therefore this policy applies to all schools within The Partnership Trust.

### 1. Context

- a. In order to be effective, Trustees need to have an understanding of all schools within the Trust, their Local Governing Bodies and how they operate.
- b. All Trustees are ‘paired’ with at least one school and undertake at least one visit to that school and its Local Governing Body each school year.
- c. The Trust Board delegates some of their responsibilities to Governors, this includes responsibilities in relation to monitoring the school development plan and other areas. Full details of delegation can be found in the Trust’s Governance Plan.
- d. Governors need to know their school(s) and how it works. Visiting the school during the school day is just one way Governors can gain information. Other ways include reading policies, receiving information/data and of course receiving the Headteacher’s reports to the governing body which will include progress reports on the implementation of the School Improvement Plan (SIP).
- e. Members of the Local Governing Body make at least one focus visit each year to the school during the school day within their role as Governors. All visits are agreed and planned within Governor meetings. It is important for individual Governors to remember that when they visit the school, they act as representatives of the Board, which has corporate responsibility for the overall leadership of the school.

### 2. Governor Visits

#### 2.1 Aims and definitions

- a. This policy aims to set and maintain standards of conduct that we expect all governors to follow when making visits to the school. Governors do not have an automatic right to enter the school. When they do so, they are invited guests.
- b. This policy sets out the procedure which all governors are expected to follow when visiting the school and how they are expected to report back on that visit to the LGB.
- c. By creating this policy, we aim to ensure that all governors understand their role and purpose so school visits are a productive and enjoyable event for all involved.

#### 2.2 Guidance and Scope

- a. This policy takes account of best practice and guidance from the DfE [Governance Handbook](#) (section 3.4.2).
- b. Governors are observers:

Boards must know their schools in order to maintain robust accountability. Through pre-arranged visits that have a clear focus, governors will:

- Observe whether the school is properly implementing school policies, and actions from the school improvement plan
- Observe how those procedures are working in practice
- Have the opportunity to gather the views of pupils and staff

c. Governors are not inspectors:

Governors:

- Will not assess the quality of teaching and learning in the classroom
- Will not manage the school or interfere in the day-to-day operations of the school
- For those governors who wish to spend time in a classroom, they will make it clear about their purpose in doing so.

### 2.3 Purposes of Governor Visits

- a. The main purpose of any Governor visit to the school is to meet the board's statutory obligation to monitor the school's effectiveness. This focused monitoring is planned in advance within Governor meetings and agreed by the Headteacher who is able to support effective monitoring by advising on the type of monitoring activities that they will undertake.
- b. There are 2 types of visits:
  - **Formal monitoring visits**, where governors discuss the progress of the school in a particular area with the relevant staff member(s); group of pupils. This can include looking at pupils work etc.
  - **Learning walks**, where governors will go around the school with the relevant staff member to get a feel for a particular area and are likely to talk to a range of staff members and pupils
- c. Visits to the school also give Governors a first-hand impression of what the school is like and what goes on there and therefore give Governors a context and background for discussions at Governors' meetings – something of the feel of the school and the flavour of its work that they cannot otherwise obtain. Without such first-hand impressions, the picture of the school that Governors carry in their minds is liable to be based on their own schooldays rather than current reality. What Governors learn from visiting the school should add to what the governing body as a whole knows about the school.
- d. A subsidiary, but important purpose of visiting the school is to demonstrate to staff that Governors' responsibilities are taken seriously and that Governors are interested in the school and how it works during the school day. Governors have extensive powers which affect staff, and staff can reasonably expect Governors to exercise these powers with a good understanding of their work and clear evidence of goodwill.
- e. Governors must remember that visits should relate to their responsibilities as Governors. It is a part of the Head's responsibility to manage the school from day to day and to supervise staff, in accordance with the aims, objectives and policies approved by the governing body. Moreover, to judge the quality of teaching and learning in a school is a specialist skill which non-specialists

cannot exercise on the basis of a short, occasional visit. When using visits to gain information and impressions to help in the role of Governor, Governors do so as observers, not as inspectors.

- f. A visit gives only a glimpse or snapshot of what goes on. Governors should not assume that what is learnt at one or even several visits gives a full and balanced picture. Conclusions may be entirely valid as far as they go and Governors should not reject the evidence of their own eyes and ears; but both may need to be checked with others and revised in the light of further evidence.

#### **2.4 Protocols for Governor Visits to The Partnership Trust Schools:**

- a. All Governors will make at least one formal visit per year to the school on behalf of the governing body. This will not include induction visits for new Governors.
- b. Visits will have a clear focus linked to a curriculum subject, a school policy, an aspect of the School Improvement Plan or some other specific area of the management of the school.
- c. In order to undertake their role with objectivity, ideally, Governors will not monitor classes containing their own children nor will they begin monitoring until they have received suitable training as part of their induction course.
- d. The governing body will decide on a programme of visits. The focuses will be clearly identified. Then the date and timing of specific visits will be arranged by the Governor concerned, in consultation with the Headteacher and other staff involved.
- e. If a Governor is going to spend time in a classroom this will be discussed with the class teacher so that both are clear how long the Governor is coming for, what they are going to look at and what they are going to do.
- f. Governors should understand that their visits do not replace professional inspections or the monitoring role of the Headteacher.
- g. After visits, Governors should discuss their impressions and any concerns they may have with the Headteacher and then report back to the next meeting of the governing body by completing a written report. (see Appendix 1 for example report).
- h. The report should be a summary of main points from the visit rather than a long narrative.
- i. The report should be shared with the Headteacher and the Chair of Governors for comment before the meeting at which it is to be presented to Governors. The Governor should then send a copy to the clerk for distribution before the next meeting.
- j. Governors should know how to conduct themselves appropriately during visits in order to minimise disruption for staff and pupils and to receive the maximum benefit from the time spent.
- k. Key points for Governors to observe when making a visit
  - Agree and confirm your visit before you arrive
  - Arrive for your visit in a timely fashion
  - Prepare for the visit - Gather and read in advance any relevant information
  - Have a clear focus and share your focus with the staff concerned

- Be attentive
  - Observe confidentiality
  - Observe the school policy for visitors and wear a 'visitors' badge available when signing in at Reception
  - Establish with staff what is expected of you
  - Talk and share your experience with the teacher and Headteacher
  - Be prepared to give written feedback to the governing body
  - When Governors visit the school it is important that they do not make judgments on the quality of teaching they see. The Headteacher is responsible for monitoring teaching in the school.
  - Evaluate the visit yourself by asking the following questions:
    - were the objectives of the visit fulfilled?
    - was everyone involved properly prepared?
    - did you see what you wanted to see?
    - what would you do differently next time?
    - were there areas you would like to know more about?
    - what effect has the visit had on you, the school and the governing body?
  - Use the agreed recording method for the visit. Photographs and videos are to be avoided unless specifically agreed with the headteacher for a specific purpose
  - Remain as observers; they are not there to pass judgement on staff or inspect them
  - Ensure all parties are clear about why a governor wishes to spend time in the classroom, if they wish to do so
  - Check with teachers before speaking to pupils
  - Pass on any concerns the staff raise with the relevant people
  - Be friendly but professional and dress appropriately, bearing in mind the standards of dress set for teachers and pupils
- l. Governors will not:
- Pass comment on classroom practice or any specific incidents that happen, judge teaching methods, assess the quality of teaching, or comment on the extent of learning
  - Interfere with the day-to-day running of the school
  - Behave in a manner than would make staff feel that they are there to inspect, e.g. sit at the back of the classroom with a clipboard
  - Raise concerns in the moment. Governors should note down any concerns they may have and raise them with the chair of governors or headteacher after the visit
- m. Governors will complete a written report as soon as reasonably practicable (example Report Templates can be found at Appendix 1 (monitoring visit) or Appendix 2 (learning walk)), as appropriate. In completing the report, governors will ensure to:
- Use neutral language at all times
  - Remain observational, and describe only what they see
  - Focus closely on the agreed reasons for the visit, and its strategic role
  - Once complete, governors will submit their reports to the following people, in the following order:
    - The relevant staff member and Headteacher, both as a courtesy and to check for accuracy
    - The chair of the governing board or the relevant committee, as agreed
- n. If Governors have any concerns as a result of their visit, they must always raise them with the Headteacher without delay.

### **3. Trustee's Visits to Schools**

#### **3.1 Context:**

In order to be effective, Trustees need to know the schools and Local Governing Bodies within the Trust and how they work.

#### **3.2 Purpose of Trustee Visit:**

- a. To gain a first- hand impression of what the school is like, giving Trustees a context and background for discussions at Trust Board and Committee meetings, providing something of the feel of the school and flavour of its work that they cannot otherwise obtain through the data, reports and presentations made available to them. What Trustees learn from visiting the school should add to what the Trust Board knows as a whole about the school.
- b. To demonstrate to school staff and the community that Trustees take their responsibilities seriously and that they are interested in the schools within the Trust and how they work during the school day. Trustees have extensive powers which affect staff and staff can reasonably expect Trustees to exercise these powers with a good understanding of their work and clear evidence of goodwill

#### **3.3 Protocol for Trustee Visits**

- a. All Trustees are 'paired' with at least one school for two years.
- b. All Trustees will make at least one formal visit to at least one Trust School and their Local Governing Body meeting during the academic year on behalf of the Trust Board
- c. The visit to the school should ideally take the form of a learning walk
- d. Visits should last no more than 1.5 hours.
- e. Trustees should understand that their visits are not professional inspections or monitoring of the school and that they provide only a 'snapshot' of what goes on.
- f. Trustees are not 'representatives' for their paired school and do not represent the school at Trust Board level.

#### **3.4 Key Points for Trustee Visits**

- a. Arrangements for visits to the school should be made with the Headteacher
- b. Confidentiality and the school's policy for visitors must be observed
- c. If a Trustee has concerns about the school as a result of the visit they must raise them with the Headteacher and the CEO without delay
- d. Trustees should notify the clerk to the Trust Board when visits are taking place so that a register of visits may be kept.
- e. Trustees will provide a verbal or brief written report on their visit to the Trust Board and may use the template at Appendix 1 or 2 for the purposes of any written report.

### **4. Safeguarding.**

The Partnership Trust is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share this commitment. The Headteacher is responsible for ensuring that all volunteers working in the school and having contact with children have had the appropriate supervision and level of checks including DBS (Disclosure and Barring Service) check if necessary. All Governors will hold an enhanced DBS clearance.

## Appendix 1: Example Template report for a monitoring visit

<b>Governor's Monitoring Report : School Visit</b>	
<b>Name and role of governor(s)</b>	
<b>Name and role of staff member(s)</b>	
<b>Date and time of visit</b>	
<b>Agreed focus</b>	<i>Ensure you focus on this agreed reason for the visit and avoid getting distracted by other issues that have not been agreed with the member of staff.</i>
<b>Relevant school objective or priority</b>	<i>Taken from the school improvement plan (SIP) or the school's overarching vision.</i>
<b>Questions to ask</b>	<i>To help prepare you may wish to note specific questions you want to ask based on the SIP, or points to follow up on from a previous visit and share these questions with the staff member you are visiting in advance so that they can prepare</i>
<b>Summary of monitoring activities</b>	<i>What have you covered during your monitoring, what have you seen and who have you spoken to?</i>
<b>Evaluation of visit</b>	<i>Include specific evidence that demonstrates the intent of what you are monitoring; how it is being implemented and the impact and how it is measured.  Where a positive impact has not been made yet, note down why that is and what steps are being taken to make progress</i>
<b>Agreed Actions Points</b>	<i>Add any further evidence you would like to see to help you make a better assessment of the impact</i>
<b>Any follow up / additional observations</b>	
<b>Question/Clarifications to follow up with Headteacher or Chair of Governors</b>	

## Appendix 2: Example Template report for a learning walk

Governor's Monitoring Report : Learning Walk	
<b>Name and role of governor(s)</b>	
<b>Name and role of staff member(s)</b>	
<b>Date and time of visit</b>	
<b>Agreed focus</b>	<i>Ensure you focus on this agreed reason for the visit and avoid getting distracted by other issues that have not been agreed with the member of staff.</i>
<b>Relevant school objective or priority</b>	<i>Taken from the school improvement plan (SIP) or the school's overarching vision.</i>
<b>Questions to ask</b>	<i>To help prepare you may wish to note specific questions you want to ask based on the SIP, or points to follow up on from a previous visit and share these questions with the staff member you are visiting in advance so that they can prepare</i>
<b>General notes from discussions with staff</b>	<i>Remember you are not there to pass judgement on staff or inspect them</i>
<b>General notes from discussions with pupils</b>	<i>Remember do not ask pupils' views on a specific teacher and do not record pupils' names</i>
<b>General notes on school environment and overall atmosphere</b>	<i>Include reflection on whether the school's vision is replicated 'on the ground'</i>
<b>What successes stood out on the learning walk and why</b>	<ul style="list-style-type: none"> <li>•</li> </ul>
<b>Questions for clarification with Chair of Governors or Headteacher</b>	<ul style="list-style-type: none"> <li>•</li> </ul>