

# Trustee and Local Governors Visits Policy



### Management log

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Chair of the Board



CEO

### Document history

Version	Date authored	Author	Date approved	Date issued	Comments
V1	7 June 2017	Helena Brooks	15 June 2017	15 June 2017	To secure a policy which supports trustees and governors commitment to report visits
V2	Amendment to the report section to include 'recommendations' was agreed under Chairs action on 20/03/2018				
V3	Amendment to the report section to include 'areas of responsibly and location visited was agreed under Chairs action on 19/07/2018				
V4	September 2019	Helena Brooks	7 November 2019	15 November 2019	Annual review – revised and updated to secure trustees and governors commitment to report visits

### Related policies

Policy

Code of Conduct

Website link

<https://www.shine-mat.com/trust-documents/>

General Data Protection Regulation (GDPR) <http://www.shine-mat.com/gdpr/>

Terms of Reference <https://www.shine-mat.com/trust-documents/>

Please note that the version of this document contained at <https://www.shine-mat.com/policies/> is the only version that is maintained.

Any printed copies should therefore be viewed as ‘uncontrolled’ and as such, may not necessarily contain the latest updates and amendments.

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## Why visit

Trustees and local governors (governors) will have a need to conduct formal visits to the academies with the SHINE Multi Academy Trust (SHINE) for any of the following reasons:

- To contribute to the Board and /or local governing body's (LGB) monitoring role (visits are only one of the ways in which trustees and governors fulfil this role).
- To develop trustees' and governors' understanding of the academies' strengths and weaknesses.
- To provide sources of evidence:
  - For the academy SEF and Ofsted
  - To use when reviewing and evaluating policies
- To see evidence of the progress being made in the academies and evaluate this within the Board and / or its local governing body.
- To enable individual trustees and governors to ask informed and challenging questions at Board and / or its local governing body meetings.
- To help trustees and governors understand the teaching and learning process.
- To see policies in action.
- To provide an insight into the daily working of the academies.
- To demonstrate to staff and pupils that trustees and governors are interested in what goes on in academies within SHINE.
- To give trustees and governors an enhanced sense of identity with SHINE and the people who work in it.
- To build and enhance positive relationships between staff and trustees and governors and to demonstrate that trustees and governors are interested in what goes on within SHINE academies.
- To share and celebrate in the academies' successes.
- To offer the maximum amount of appropriate support.
- To support the academies' work.

## Procedure for visits

### Planning

- A schedule of visits should be agreed annually – the schedule should be linked to key priorities in development or action plans but should also take account of the needs of new trustees and governors and any new initiatives.
- Visits must have a clear purpose – this should be derived from development or action plans and related to trustees' and governors' links with staff.

### Before

- Complete applicable sections of the pro-forma for 'planning a monitoring visit'.
- Make contact with the academy.
- Ask for a plan or tour of academy if unfamiliar with layout.
- Discuss an agenda with the CEO, headteacher, curriculum coordinator, or teacher well in advance.
- Allow enough time to plan the visit, agree time and duration.
- Be sure that staff are clear about the purpose.
- Member of staff to inform pupils and other staff of planned visit.
- If a lesson is to be observed, ask staff what they expect from you during the lesson.
- Ask for any relevant papers that you could read before the visit.
- Ask staff if there is anything, they would like you to know before the visit.
- Agree how you will be introduced and what your role in the classroom will be.
- Be positive, friendly and encouraging.

### During

- Make every effort to arrive on time.
- On arrival remember to follow the academy's safeguarding procedures.
- Make sure the headteacher knows that you are on site.

- Remember that you are not inspecting the academy.
- Remember that the academy is a workplace for lots of people.
- Remember that you are there to learn.
- Individual trustees and governors do not have an automatic right to enter the academy whenever they wish.
- Remember to stick to the purpose of your visit.
- Avoid getting drawn in to any discussion on personal or general staff grievances.
- Look relaxed, get involved and blend in.
- Observe discreetly and remember that note taking is disconcerting for everyone.
- Talk to staff and pupils, show interest and enthusiasm.
- When appropriate ask questions, be courteous not critical.
- Keep an open mind, be flexible and go with the flow.
- Look for opportunities to give praise.
- Remember to observe confidentiality and discretion. Trustees and governors are asked not to discuss the behaviour or performance of individual children with other trustees and governors or parents.

#### After

- Thank staff for hosting your visit.
- Discuss what was observed with the member of staff.
- Allow staff to explain and check out understandings.
- Ask for explanations on anything about which you are unsure.
- Be positive, friendly and encouraging.
- Make your notes as soon as possible whilst observations and discussions are still fresh in your mind.
- Discuss your observations with the headteacher.

- Agree arrangements for any follow up visits.
- Reflect on what you have seen and how this connects to the academy's priorities.

### Reporting back

- Complete the visit pro-forma and send a draft copy to staff for comments.
- Be prepared to amend your report in the light of comments.
- Ensure that the clerk to the board and local clerk receive an agreed copy of the report in good time for distribution.

### During the visit.....

#### **Lesson observations** (must be agreed prior to the visit)

- The trustee or governor and all staff must be clear on the purpose of the visit. Focus of the observation to be agreed and clear to all and an understanding reached that the trustee or governor will make full use of opportunities to talk to the pupils without distracting them from their work too much!
- Teacher to identify the different ability groups of pupils within the class setting.
- Teacher to ensure that planning is available so that trustees and governors can check on expectations and differentiated work.
- Trustee or governor to remember to thank the staff and children at the end of the lesson.
- Any concerns must be raised with the headteacher and not the teacher.

#### Possible **work scrutiny** to be agreed

- This possible strategy must be decided prior to the visit.
- The choice of books from, say, the more able pupils in specific year groups and for certain core subjects should stem from the data analysis undertaken by the academy and shared with the governor(s).
- Don't overcomplicate this strategy by trying to look at too many books and with too many focuses.

- Check on differentiated work by looking at a dated piece of work from more able pupil and a lower ability pupil if that might be a academy concern.
- Could check if the marking challenges the pupils to improve their work and gives clear guidance (and check with pupils).

Time to be set aside for **pupil discussions**

- This is a significantly important area of the trustees' and governors' work that can help in academy in many ways.
- Trustees and governors are well placed to discuss pupils' views of the academy openly and honestly.
- It may be helpful if pupils bring examples of work to the discussion.
- Questions to be covered on this aspect might include:
- Do you find the work easy or difficult?
- Which parts of your work do you find the most interesting? Talk me through an aspect you enjoyed.
- Do you have the opportunities to extend your learning at home and outside academy?
- Does the teacher's marking help you to improve?
- If you could improve any aspects what might they be?

**What a visit is not about**

- Making judgements on the quality of teaching or professional expertise of the teacher, this is the role of the headteacher.
- Checking on progress of individual children.
- Pursuing personal interests and concerns.
- Monopolising academy/teacher time.

Consider a **learning walk** and/or **discussion with support staff**

**Trustee or governor pre-visit pro-forma**

<p><b>What is the purpose of the visit?</b></p> <p>What has prompted my decision to visit?</p> <p>What aspect of the academy development plan does my visit relate to?</p> <p>How can my visit benefit the academy?</p>	
<p><b>How shall I carry it out?</b></p> <p>Who do I need to contact in advance?</p> <p>What particular areas of the academy am I interested in?</p> <p>What particular activities am I interested in?</p> <p>What particular age-group(s) am I interested in?</p> <p>What questions should I ask?</p> <p>Who should I ask?</p>	
<p><b>Did I achieve my aim?</b></p> <p>To what extent did I address the reason for my visit?</p> <p>Which of my questions did I answer?</p> <p>What difficulties did I meet and why?</p>	
<p><b>Is there any follow-up?</b></p> <p>Have I recorded my experiences?</p> <p>Did I “report back”?</p> <p>Have I prepared a short report for the next trustees and Local Governors’ meeting?</p> <p>How can I build on this for the next visit?</p>	

**Trustee or governor visit report pro-forma**

Name of school / academy:	
Visit made by:	On:
Trustee / governor area of responsibility:	
What was the purpose of the visit?	
What was looked at?	
Questions asked and answers provided:	
Evaluation of visit including key issues/actions identified or other follow up questions:	
Recommendations (agreed with the headteacher):	