

TRUSTEE & GOVERNOR VISIT POLICY

DOCUMENT INFORMATION – FRONT SHEET

PURPLE: Trust Policy

This cannot be changed without Trustee approval

POLICY OWNER/AUTHOR	NEW POLICY	CURRENT POLICY - REDRAFT/AMENDMENTS	
Sian Griffiths	No	N/A – no changes	
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1. AIMS

This policy aims to support Trustees and Governors to understand their role and purpose, so visits are a productive and enjoyable event for all involved. The policy also provides an overview of the standards of conduct that the LiFE Multi Academy Trust (hereinafter referred to as the 'Trust') expect all Trustees and Governors to follow when undertaking visits to the Schools and/or other Trust activities. Trustees and Governors do not have an automatic right to enter Trusts locations including Schools. When they do so, they are invited guests.

This policy sets out the procedure which all Trustees and Governors are expected to follow when visiting Schools and/or other Trust locations and how they are expected to report back on that visit to the Trust Board or Local Governing Board. In addition, all those involved in governance should be:

Committed - devoting the required time and energy to the role and ambitious to achieve best possible outcomes for young people. Prepared to give time, skills and knowledge to developing themselves and others in order to create highly effective governance.

Confident - of an independent mind, able to lead and contribute to courageous conversations, to express their opinion and to play an active role on the board.

Curious - possessing an enquiring mind and an analytical approach and understanding the value of meaningful questioning.

Challenging - providing appropriate challenge to the status quo, not taking information or data at face value and always driving for improvement.

Collaborative - prepared to listen to and work in partnership with others and understanding the importance of building strong working relationships within the board and with executive leaders, staff, parents and carers, pupils/students, the local community and employers.

Critical - understanding the value of critical friendship which enables both challenge and support, and self-reflective, pursuing learning and development opportunities to improve their own and whole board effectiveness.

Creative - able to challenge conventional wisdom and be open-minded about new approaches to problem-solving; recognising the value of innovation and creative thinking to organisational development and success.

2. GUIDANCE AND SCOPE

This policy takes account of best practice and guidance from the Governance Handbook (section 3.4.2).

2.1 Trustees and Governors are Observers

The Boards must know their Schools in order to maintain robust accountability. Through pre-arranged visits that have a clear focus, Trustees and Governors will:

- Observe whether the School is properly implementing School Policies, and actions from the School Improvement Plan (Trustees/Governors).
- Observe whether the Trust is properly implementing Trust Policies (at Trust level) and actions from the Trust Steering Wheel (Trustees).

- Observe how those procedures are working in practice
- Have the opportunity to gather the views of Pupils and Staff

2.2 Trustees and Governors are not Inspectors

Trustees and 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 Trustees or Governors who wish to spend time in a classroom, they will make it clear about their purpose in doing so.

3. VISITS PROGRAMME

Trustees and Governors should carry out regular visits to Schools and other Trust activities in order to meet the Board's statutory obligation to monitor the Trust and School's effectiveness.

There are 2 types of visits:

- **Formal monitoring visits**, where Trustees or Governors discuss the progress of the Trust/School in a particular area with the relevant Staff member
- **Learning Walks**, where Trustees or Governors will go around the Trust/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/or Pupils

Trustees and Governors will carry out Trust/School visits according to the schedule agreed by the Trust Board (Trustees) and LGB's (Governors).

All Trustees/Governors have a responsibility to monitor and evaluate the progress of their School(s) and contribute to the self evaluation process. This can be completed through a variety of methods including reports from the Headteacher and Senior Staff, analysis of data and through first-hand observation. The visits help individual Trustees/Governors to get to know one area of the Trust/School very well. Feedback from focused Trustee and Governor visits to the Schools and other areas of the Trust enables the Trust Board and Local Governing Board to make informed decisions around the process of Trust/School improvement. For such visits to be positive and supportive, they must be planned in a way that enhances the relevant Boards understanding of an aspect of the Trust or School's work.

The areas which Trustees and Governor will focus on during their visits should be agreed at the Trust Board or Local Governing Board (LGB) meeting at the beginning of each academic year or term. Visits form part of the monitoring and evaluation of the Trust/Schools performance when linked tightly to the key priorities. It can help to maximise the effectiveness of the Board and to enrich discussions about the Trust/School's performance. The aim of the visits is to allow Trustees/Governors to see the School on a working day, for Staff to get to know Trustees/Governors and for Trustees/Governors to develop an understanding of the quality of education. It is important for Trustees/Governors to see how the vision, values and aims of the Trust/School are shown in the intent of the curriculum or area of the visit, how it is implemented and then evaluated.

What are Trustees/Governors expected to do?

- Visit the Trust/School to talk to the member of Staff responsible for their area.
- Monitor the implementation of the Trust/School's strategy in that area
- Understand the policy which guides this subject/area.
- Occasionally visit a class working in that subject.
- Ask questions, listen and learn but not inspect.

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- The findings should help the Trust Board or Local Governing Board to make well informed judgments about the progress being made towards the priorities and targets.
- Ideally Trustees/Governors should visit the Trust/School **ADD NUMBER** in each academic year.

Prior to the visit Trustees/Governors will –

- Liaise with the Headteacher and/or key member of Staff to arrange a date and time and agree who would have a copy of the written report prepared after the visit e.g. Headteacher, member of the SLT (Senior Leadership Team) as well as the Staff concerned in their visit.
- Clarify the purpose of the visit in advance with the Chair, the Headteacher and/or relevant member of Staff ahead of the visit
- The Headteacher and/or key member of Staff will arrange a programme for the Trustee/Governor, with an opportunity to meet the Headteacher and/or key member of Staff linked to the area, Middle Leaders, Staff and Students.
- Send questions in advance to the Staff member so everyone can feel properly prepared
- Be familiar with the School's safeguarding policies and procedures

During the visit Trustees/Governors should/will -

- be sensitive to the numerous demands Staff have on their time
- 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.
- be on time and meet with the Headteacher/contact person ahead of the visit
- always wear a visitor's badge
- remain as observers; they are not there to pass judgement on Staff or inspect them
- ensure all parties are clear about why a Trustee/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 Headteacher
- be friendly but professional and dress appropriately, bearing in mind the standards of dress set for Teachers and Pupils

Trustees/Governors should/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 that 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. Trustees/Governors should note down any concerns they may have and raise them with the Chair of Governors or Headteacher after the visit

6. AFTER A VISIT

Trustees/Governors will complete a written report as soon as reasonably practicable (please use the form attached as Appendix A (Monitoring Visit) or Appendix B (Learning Walk), as appropriate. In completing the report, Trustees/Governors will ensure they:

- 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, Trustees/Governors will submit their reports to the following people, in the following order:

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- The relevant staff member, both as a courtesy and to check for accuracy and to allow for feedback
- The Headteacher or another member of the SLT (Senior Leadership Team), as a courtesy
- The Chair of the Trust Board/LGB, as agreed to ensure that feedback from the visit is shared with Trustees/Governors at the next meeting (standing agenda item).

APPENDIX 1 - EXAMPLE VISIT SCHEDULE TO BE UPLOADED ONTO GOVERNOR HUB

	Key Area	Staff Contact Link	Email Address to arrange Visit	Visiting Governor
1	Safeguarding			
2	SEND			
3	Strategic Wheel			
4	Pupil Premium			
5	Governor Training			
6	Careers and Destinations (recommended for Secondary Schools)			
7	Health and Safety			

APPENDIX 2 - TEMPLATE REPORT FOR A TRUSTEE/GOVERNOR VISIT

Formal monitoring visits are where you discuss the progress of the Trust/School in a particular area with the relevant Staff member. Please use this form as a reminder of what to look for and what to ask.

PART 1: PLAN THE VISIT

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Name of Trustee/Governor	
Name and role of Staff Member(s)	
Date and time of visit	
Agreed focus Make sure you focus on this agreed reason for the visit. Avoid getting distracted by other issues that have not been agreed with the member of Staff.	
Relevant Trust/School objective or priority This might be taken from the School Improvement Plan (SIP) objectives or the school's overarching vision.	
Questions to ask Note specific questions you want to ask based on the SIP, or points to follow up on from a previous visit. Share these questions with the Staff member you are visiting in advance, so they can prepare.	Quality of education - How do leaders QA implementation and how do they connect this to intent? Behaviour & Attitudes - Is student behaviour at least good? Personal Development & wellbeing - Can pupils articulate what they have learned in the personal development and wellbeing curriculum? Do they believe it's relevant to their lived experiences? Safeguarding - Do the pupils say that they feel safe? Leadership & Management - Is the school improvement plan addressing the critical issues and how well is it progressing?

PART 2: IN THE MEETING

What is the school doing within this area of focus?

Tips:

- Ask open questions beginning with 'what', 'how', 'when', 'how often', 'why', 'who' and 'where'
- Do not be afraid to clarify any terms or acronyms you're not familiar with
- Remember you are **not** there to pass judgement on staff or inspect them – you remain an observer
- When writing the report, use neutral language and do not name individual teachers and pupils

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How do you know the Trust/School's actions are having an impact?

Remember:

- *Include specific evidence that demonstrates the positive impact the school is having in this area*
- *Where a positive impact has not been made yet, note down why that is and what steps are being taken to make progress*
- *Add any further evidence you would like to see to help you make a better assessment of the impact*

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What successes stood out and why?

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Questions and clarifications to follow up with the Headteacher or Chair, LGB

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Completed forms to be emailed to the Governance Professional who will upload into the folder on Governor Hub

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APPENDIX 3: TEMPLATE REPORT FOR A SAFEGUARDING VISIT

The aim of this checklist is to ensure you are comfortable asking the questions that will support the LGB to triangulate evidence of effective safeguarding and Prevent practice and enable you to act as the link in relation to safeguarding requirements, process and procedure.

Please ensure that you have identified and agreed clear objectives for your visits with the relevant member of staff and note them on this form. There is space against the questions for your thoughts and comments. If you choose not to comment then please make sure you complete the basic part of the form. If you have any concerns then please speak to the Chair of the LGB. Thank you for taking the time to visit.

Name of LGB member:	Name of designated Safeguarding Staff:
Key activities undertaken:	Date of visit:
Meetings and discussions with: DSL Staff/ Students SCR holder	SCR check ✓ Learning Walk Safeguarding, CP & Prevent Risk Assessments ✓
Visit objectives:	
Areas of good practice noted:	
What questions have been raised from your visit?	
Follow-up from previous visits:	

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1. Policies are in Place and Up-to-Date		Yes / No	Evidence / Comment
Autumn Term only	Safeguarding and Child Protection Policy		
	Staff Code of Conduct		
	Allegations against Staff Policy		
	Safer Recruitment Policy		
	Anti-bullying - Students Policy		
	E-Safety Policy		
2. Single Central Record Checks		Yes / No	Evidence / Comment
Termly Check	There is a SCR of staff and volunteers.		
	The SCR indicates identity checks have been carried out and by whom.		
	All required checks have been undertaken and are up-to-date.		

	A separate record, by year, of checks undertaken on staff whilst employed at the academy after they leave is maintained.		
3. Discussions with Staff		Yes / No	Evidence / Comment
At Least Annually	Staff are aware of and understand relevant safeguarding, child protection and Prevent policies.		
	Staff know who the DSL / 'reserve' DSL are.		
	Staff understand and follow safeguarding, child protection and Prevent procedures and paperwork.		
	Staff feel their training has adequately prepared them to know what to look out for and how to proceed if they have a concern.		

Discussions with Students		Yes/ No	Evidence / Comment
At Least Annually	Students feel the academy raises awareness about personal safety when they are not in the academy.		
	Students feel safe at the academy.		

	Bullying and cyber-bullying is handled successfully by the academy.		
	Students have been taught how to stay safe when using the internet and social media.		
	Students feel safe on the way to and from the academy.		
	Student behaviour is generally good to and from the academy.		
	Student Voice includes safety issues on its agenda.		
	There is a peer support / buddy scheme for new or vulnerable students		
	Students know who to go to if they have a problem.		
	Students feel confident about seeking help.		

Guidance: The SCR must indicate whether particular checks are required, when and by whom each check was carried out and the outcome of the check. The SCR must contain the following information for all staff at the Academy:

- Identity: full name, address, date of birth
- Qualifications and Registrations
- GTC Registration (Qualified Teachers only)
- List 99 / Children's Barred List
- Enhanced DBS Disclosure
- Right to Work in the UK
- Overseas checks
- Section 126 checks on those managing educational establishments

APPENDIX 4: TEMPLATE REPORT FOR A LEARNING WALK

Learning walks are where you will go around the school with the relevant staff member to get a feel for a particular area. You are likely to talk to a range of staff members and pupils. Use this as a reminder of what to look for and what to ask.

PART 1: PLAN THE WALK	
Name of Trustee/Governor	
Name and role of Staff member(s)	
Date and time of visit	
Agreed focus <i>Make sure you focus on this agreed reason for the visit. Avoid getting distracted by other issues that have not been agreed with the member of staff.</i>	
Relevant school objective or priority <i>This might be taken from the school improvement plan (SIP) objectives or the school's overarching vision.</i>	
Questions to ask <i>Note specific questions you want to ask based on the SIP, or points to follow up on from a previous visit.</i> <i>Share these questions with the staff member you are visiting in advance, so they can prepare.</i>	

Part 2: on the walk

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General notes from discussions with staff*Tips:*

- *Ask open questions beginning with 'what', 'how', 'when', 'how often', 'why', 'who', 'where' and 'can you show me...'*
- *Do not be afraid to clarify any terms or acronyms you're not familiar with*
- *Remember you are not there to pass judgement on staff or inspect them*
- *When writing the report, use neutral language and don't name individual teachers*

General notes from discussions with pupils*Remember:*

- *Do not ask them for pupils' views on a specific teacher*
- *Do not record pupils' names*

General notes on the school environment and overall atmosphere*Note:*

- *Whether the governors' vision of the school is replicated on the ground*
- *Any issues with the school site you see e.g. broken equipment or lack of resources*

What successes stood out on the learning walk and why?**Questions and clarifications to follow up with the Headteacher or Chair of Governors**

