



Brighter Futures
Educational Trust

TRUSTEE VISIT POLICY

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VERSION CONTROL

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1. AIMS

This policy aims to set and maintain standards of conduct that we expect all trustees to follow when making visits to the schools. Trustees do not have an automatic right to enter the schools. When they do so, they are invited guests.

This policy sets out the procedure which all trustees are expected to follow when visiting the schools in the trust and how they are expected to report back on that visit to the governing board.

By creating this policy, we aim to ensure that all trustees understand their role and purpose so school visits are a productive and enjoyable event for all involved.

2. GUIDANCE AND SCOPE

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

2.1 Trustees are observers

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

2.2 Trustees are not inspectors

Trustees:

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

3. VISITS PROGRAMME

Trustees will carry out regular school visits in order to meet the board's statutory obligation to monitor the school's effectiveness.

There are 2 types of visits:

- Formal monitoring visits, where trustees discuss the progress of the school in a particular area with the relevant staff member

- Learning walks, where trustees 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

Trustees will carry out school visits according to the following schedule:

3.1 Trustees for health and safety, special educational needs, and safeguarding

These trustees will attend:

- A termly 1:1 monitoring visit with corresponding staff leads
- Ad hoc meetings as required or requested on issues specific to their areas of responsibility

3.2 Subject lead trustees

Subject lead trustees will attend:

- A monitoring visit with the subject lead three times a year, ideally in September/February/May
- A learning walk three times a year, ideally in October/March/June

3.3 All trustees

All trustees will:

- Carry out at least 1 learning walk each term
- Attend at least 1 school assembly in the year
- Attend at least 1 educational visit in the year

4. BEFORE A VISIT

Trustees will:

- Notify the Governance Professional before scheduling a visit, even if the headteacher will not be involved in the visit. They should be made aware just as a matter of courtesy.
- Schedule an appointment with relevant members of staff in order to avoid friction and ensure visits are scheduled for times that are mutually convenient. Generally, trustee visits are more productive when conducted during a school day.
- Be sensitive to the numerous demands staff have on their time
- Clarify the purpose of the visit in advance with governance professional, the headteacher and/or relevant member of staff ahead of the visit
- Send questions in advance to the staff member so everyone can feel properly prepared
- Be familiar with the school's safeguarding policies and procedures

5. DURING A VISIT

Trustees 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.

Trustees will:

- Be on time and meet with the headteacher ahead of the visit
- Sign in, wear a visitor's lanyard and familiarise themselves with the safeguarding procedures
- 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 trustee 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

Trustees 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. Trustees should note down any concerns they may have and raise them with the chair of trustees or headteacher after the visit

6. AFTER A VISIT

Trustees will complete a written report as soon as reasonably practicable [using the form attached as Appendix 1 (monitoring visit) or Appendix 2 (learning walk)], as appropriate. In completing the report, trustees 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, trustees will submit their reports to the following people, in the following order:

- A more experienced trustee for feedback
- The relevant staff member, both as a courtesy and to check for accuracy
- The headteacher, as a courtesy
- The chair of the board of trustees or the relevant committee, as agreed

7. LINKS WITH OTHER POLICIES

This trustee visit policy is linked to the:

- Governance Code of Conduct
- Governance and Trustee Allowances and Expenses Policy

Appendix 1: Template report for a monitoring visit

Formal monitoring visits are where you discuss the progress of the school in a particular area with the relevant staff member. Use this form as a reminder of what to look for and what to ask.

PART 1: PLAN THE VISIT

Name and role of trustee(s)	
Your Area of Interest	
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 haven't been agreed with the member of staff.</i>	To discuss the school's new strategy to improve attainment of Key Stage (KS) 2 boys.
Relevant school objective or priority <i>This might be taken from the school improvement plan (SIP) objectives or the school's overarching vision.</i>	Percentage of pupils achieving 'greater depth' in writing improves at KS2.
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. Share these questions with the staff member you're visiting in advance, so they can prepare.</i>	What is the process for supporting pupils who need extra help? Have teachers had any training to help them put this into practice? Search The Key for School Governors for questions specific to the purpose of your visit. For example, you can search for 'safeguarding questions.'

PART 2: IN THE MEETING

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 ...'
- Don't be afraid to clarify any terms or acronyms you're not familiar with
- Remember you're not there to pass judgement on staff or inspect them – you remain an observer
- When writing the report, use neutral language and don't name individual teachers and pupils

How do you know the 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

WHAT SUCCESSES STOOD OUT ON THE LEARNING WALK AND WHY?

QUESTIONS AND CLARIFICATION TO FOLLOW UP WITH THE HEADTEACHER OR CHAIR OF TRUSTEES

Appendix 2: Template report for a learning walk

PART 1: PLAN THE WALK

Name and role of trustee(s)	
Your Area of Interest	
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 haven't been agreed with the member of staff.</i>	E.g. To see the implementation of the new strategy to improve the attainment of Key Stage (KS) 2 boys.
Relevant school objective or priority <i>This might be taken from the school improvement plan (SIP) objectives or the school's overarching vision.</i>	Percentage of pupils achieving 'greater depth' in writing improves at KS2.
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. Share these questions with the staff member you're visiting in advance, so they can prepare.</i>	Ask staff: what do you do if you think a student needs further support? Ask pupils: if you need help with something, what do you do?

PART 2: ON THE WALK

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 ...'

- *Don't be afraid to clarify any terms or acronyms you're not familiar with*
- *Remember you're 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:

- *Don't ask pupils for their views on a specific teacher*
- *Don't record pupils' names*

General notes on the school environment and overall atmosphere

Note:

- *Whether the trustees' 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 CLARIFICATION TO FOLLOW UP WITH THE HEADTEACHER OR CHAIR OF TRUSTEES