



EDUCATION
and
LEADERSHIP
Trust



Levenshulme
HIGH SCHOOL



TRUST POLICY AND PROTOCOLS FOR TRUSTEE AND GOVERNOR VISITS TO SCHOOLS

V1.5

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Responsible for this policy:	Executive Headteacher
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Approval History

Approved By	Date of Approval	Version Approved	Comments
Policy Committee	10.06.2019	V1.5	

Revision History

Revision Date	Previous Revision Date	Rev	Summary of Changes	Changes Marked	Owner/Editor
23.04.15			Governors discussed this new policy on the 02.04.15 it was then formatted to academies.	Yes	PKA/WBE
06.05.15			Appendix numbered	Yes	WBE
25.10.16	06.05.15		TEMA Logo added		PKA/SME
08.05.19	25.10.16	V1.4	Amendments to Policy	Yes	PKA/CTE
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1.0 PURPOSE OF THE POLICY

Every Trust Board has a statutory responsibility to establish and monitor its trust schools' policies and evaluate the effectiveness of its schools and their curriculum. The Trust Board is also held to account for the Trust schools' performance by Ofsted and the DfE, who will assume that trustees and governors know the strengths and weaknesses of the schools and will test that assumption during an inspection.

The Education and Leadership Trust has decided to keep a Local Governing Body at each school so they can hold their individual school to account by offering challenge and support.

One of the best and most effective ways that a trustee and governor can get to know their schools is to visit during the school day and see it at work – talking to staff and students and finding out what life in the school is like. This can only be successful, however, if everyone involved understands the purpose of any such visit and the protocols around it so that there can be a relationship between staff, trustees and governors which is based on trust and a mutual commitment to school improvement. Trustees and governors are charged with the dual role of challenging **and** supporting the schools – getting the balance right between these two elements is key and neither can be carried out properly if communication, procedures and relationships are not secure.

Different trustees and governors will have responsibilities and interests, and quite possibly experience, linked to different aspects of the schools' work – e.g. resources, training, a particular subject area, achievement, behaviour and safety or social and cultural enrichment. This will mean that each is likely to wish to see different activities or places and talk to different people – staff and students. Visits should provide an opportunity to explore the area of interest and discuss progress on any key areas for improvement in schools and report back to the Local Governing Body or Trust Board.

Examples of trustee or governor activity in the schools might include:

- Meetings with staff
- Meetings with students
- Visits to assembly
- Escorted walks around school
- Opportunities for informal talk with staff
- Visiting events
- Checking the physical site and resources
- Checking health and safety or safeguarding arrangements
- Reviewing deployment of support staff

It is not intended that trustees or governors would routinely visit classrooms. This would only happen if they had been specifically invited by the teacher – for example if they wanted to illustrate some excellent practice or there is a particular event taking place, such as a STEM activity or Focus Day.

We should be mindful that trustees and governors are volunteers and so are giving up their own time to take on this role – and so if someone is visiting school for a meeting it would also make sense for them to go for a focussed walk as well rather than make a separate trip.

By visiting a school and becoming better informed trustees and governors will be:

- More aware of the needs of the schools
- More able to approach staff to meet those needs
- Well placed to bring the full governing body/MAT Board any concerns or successes
- In a good position to support the schools and their communities

2.0 WHAT ARE THE POTENTIAL BENEFITS TO TRUSTEES, GOVERNORS AND STAFF?

Trustees and Governors	Staff
To establish and develop effective relationships with the staff.	To get to know and build positive relationships with trustees and governors.
To have a greater understanding of students' needs.	To see that trustees and governors understand the diversity of students' needs.
To recognise and celebrate success.	To feel valued.
To monitor the implementation of the MAT and School Development Plan.	To appreciate and value the role and responsibilities of all trustees and governors.
To increase their first-hand knowledge of the school, which will inform strategic decisions.	To know that strategic decisions have been made from first-hand knowledge of the school.
To understand the environment and ethos/culture in which staff work and teachers teach.	To ensure trustees and governors understand the reality of the classroom and the school.
To see policies in practice.	
To find out what resources are used, what resources are needed and prioritise them.	To highlight the need for further resources if appropriate.
To show support and encouragement to staff and students.	To feel supported by the Trust Board and Governing Body of the school.
To demonstrate that the Trust Board and Governing Body is contributing to the school's self-evaluation process.	To understand the role trustees and governors play in holding the schools to account.
To develop links with a class, year group or subject area.	To see that trustees and governors form part of the school community.
To develop individual trustees and governor's roles in terms of their specific responsibilities e.g. Special Needs, Literacy etc.	To share an understanding of the specific area.

3.0 WHAT ARE TRUSTEES' AND GOVERNORS' VISITS NOT ABOUT?

The key point is that trustees' and governors' visits are not a form of inspection. Judgements are not being made about members of staff.

A school visit is also not about:

- Trustees and governors checking on the progress of their own or known children
- Monopolising staff time
- Arriving with inflexible or pre-conceived ideas
- Trustees and governors pursuing personal agendas or issues

4.0 **PROTOCOLS**

This would depend on the role of the trustee or governor, for example committee chairs may come in more often to meet with the relevant member(s) of SLT. It is important to remember the other, worklife and personal, commitments that trustees and governors have and so the time they spend in school also needs to be proportionate to their other commitments.

5.0 **ARRANGING VISITS**

Governor visits should be arranged through the appropriate senior leader in the first instance and the Headteacher will be informed. Governors should never turn up unannounced. Preparation should include agreeing what the focus of the visit is (and this should always be linked to the improvement priorities of the school, Trust and governing body), the likely activities and the 'ground rules' for it – particularly where this involves activities beyond a simple meeting with a school leader.

Trustee visits should be arranged through the appropriate Headteacher and the Executive Headteacher will be informed. The focus of the visit should be agreed with the Executive Headteacher.

School staff should have sufficient notice of the visit to do any preparation needed, such as arranging for students or other staff to talk to the visiting trustee or governor. There should be no expectation of reports being written or other additional paperwork specifically for this visit – reports flow through meetings of the governing body – although it may be acceptable, by agreement, to be working jointly on a document during the visit.

Times should be agreed in advance, and confirmed by email, and trustees and governors should be mindful of staff's likely teaching, and other, commitments when doing this. The Headteacher and Chair of Governors should be informed about all visits so that a full record can be kept.

6.0 **DURING AND AFTER VISITS**

Mindfulness of the principles of professional courtesy and conduct should help us to avoid most of the potential pitfalls. While trustees and governors will want to take notes in meetings and record their visit outcomes, they should not be walking around school with a clipboard and taking copious notes, like an inspector, and should always thank staff and students. Verbal feedback should be given where possible to staff whose event area was visited and to the link deputy/headteacher. The visit notes sheet Appendix 1 or 2 should be used to record/summarise key points and a copy given to the Headteacher and Executive Headteacher. These notes will form the basis of the governor's feedback to a subcommittee, full Local Governing Body or Trust Board meeting.

Confidentiality should be respected and any concerns identified should be discussed with the link deputy and/or headteacher.

Trustees and governors should remember that they are visiting on behalf of the Local Governing Body or Trust Board and not in a personal capacity, and that it isn't appropriate to make judgements or promises on behalf of the Trust Board or Governing Body. Staff should also realise that trustees and governors are not able to address

everyday matters that would normally be sorted out as a matter of good line management.

Trustees and governors should always act in accordance with school safeguarding procedures when on site and communicate any concerns immediately to the senior member of staff that they are visiting and the deputy headteacher i/c safeguarding. Any Health & Safety issues encountered should be raised as a priority with the link deputy and/or headteacher.

GOVERNOR VISIT NOTE SHEET (n.b. copy to the Headteacher's PA)

Governor:		Visit Purpose:
Date:	SLT link:	Visit activities:
Notes from visit activities:		
Key points/questions arising:		
Actions/next steps:		

TRUSTEE VISIT NOTE SHEET (n.b. copy to the Executive Headteacher's PA)

Trustee:		Visit Purpose:
Date:	SLT link:	Visit activities:
Notes from visit activities:		
Key points/questions arising:		
Actions/next steps:		