

Governor Visits Policy

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v1.0	30 Apr 2020	N McDermott	First Published Version based on NGA guidance.
v1.1	10 May 2022	M Greener	Local governing board reference replaced with Local Stakeholder Boards (LSB) and Headteacher replaced with Principal. New visit record form added to appendix 2 and clarity on trustee / LSB functions.

Introduction

This policy applies to Trustees and members of Local Stakeholder Boards.

This policy has been written with consideration given to working practices. By adopting this policy, a reduction in workload has been facilitated by reducing the need for individual academies to interpret the policy locally.

Trustee functions include:

- Ensuring clarity of vision, ethos and strategic direction of the Trust;
- Holding the CEO to account for the educational performance of the academies and the pupils, and the performance management of the staff; and
- Overseeing the financial performance of the Trust and making sure its money is well spent.

LSB functions include:

- To advise/act as a critical friend to the Principal;
- To advise the Trust Board about local issues they need to consider that might affect the academies;
- Represent the interest of the community within the Trust;
- Represent the school/s in its community;
- To ensure that each school's co-op identify is enacted through voice and democratic fellowship.

Governors, trustees and local stakeholder board members draw on a range of evidence in order to carry out these functions and one source of information is their own visits to their school.

Dartmoor Multi Academy Trust recognises that visits to schools by those governing can be enormously useful in helping them carry out their role. That role is largely strategic, not operational, and includes ensuring vision is being turned into reality, ethos is being embedded and progress is being made against the strategic plan.

School visits are an element of one of the National Governance Association's [eight elements of effective governance](#): knowing the school. There are numerous ways those governing can know their school or schools, for example, through receiving feedback from the principal, and seeking the views of parents, staff, and pupils. However, actually visiting the school in person provides a valuable insight into how the school operates as well as an opportunity to put other information in context. A well-planned programme of visits forms an important element of the governing board's strategic role.

While Ofsted's inspection handbook makes no explicit reference to governors, trustees or local stakeholder board members visiting their schools, inspectors will be looking for evidence of how well governing boards know their school and learning from visits can form an important part of this. When speaking to inspectors, those governing should be confident about what they are doing in visiting the school – and confident in why they are not engaging in operational activities.

Even those who are familiar with the school as staff or parents will find school visits important for developing their knowledge of the school from a governance perspective. It also has less obvious benefits, such as helping to build positive relationships with staff and demonstrating commitment to the school.

This policy applies to school visits made for the purpose of governance and not to visits to the school site that individual may make in other capacities e.g. as parents or members of staff.

Setting expectations for visits

Every visit should have a clear, prearranged focus. This is important because it helps those governing use their time, as well as that of school staff, productively. The focus of the visit will generally relate to the local stakeholder board's monitoring of the school strategy or to developing a rounded understanding of the school's strengths and weaknesses.

In most cases, the visit should link to objectives and targets set out in the Academy Improvement Plan.

Visits should involve the member of staff responsible for the objective or target meeting with the member of the governing board in order to provide background information and context, showing the initiative in action, and if possible providing the opportunity for them to speak to children or staff members who are affected by it.

Examples of what a visit could focus on include:

- Monitoring the implementation of a particular policy for example safeguarding, homework, lesson planning
- Reviewing the pupil outcomes of the ring-fenced funding spend (pupil premium / COVID catch-up, sports premium)
- Gaining an understanding of how a particular issue (e.g. provision of ICT, boys' achievement, literacy) is dealt with on a day-to-day basis
- Reviewing the designed pupil/staff schemas and understanding which groups are under represented and why and what can be done to address this

During any visit to the school it is important to remember that **the role of those governing is strategic, not operational**. Visits by members of the local stakeholder board should not be confused with inspections.

For example, if the focus of the visit is the Safeguarding policy, acceptable activities would be to seek an understanding of how the policy is managed, how staff are made aware of the policy, about any issues and how they have been dealt with, what lessons have been learned when things go wrong, how safeguarding is monitored and how the findings are acted upon.

Most of the time, school visits will have a key focus on the local stakeholder boards monitoring role, but there are some occasions where this won't necessarily always be the case. For example, a new member of the local stakeholder may 'tour' the school as part of their induction or those governing may attend a parents' evening as a means of engaging with parents. If the school has parent or pupil councils, it can be useful for members of the local stakeholder board to meet with these groups or sit in on meetings.

A common pitfall: "I'm here to observe the lesson"

It can be easy to fall into the trap of referring to a school visit as a chance to "observe" teaching and learning – but doing so could cause unnecessary confusion and stress. "Lesson observation" has a specific meaning in a school context: it is an activity undertaken by school leaders in order to collect evidence about teachers' performance for the purposes of appraisal. This is, of course, a professional task and should be carried out by the principal or appropriate line managers.

Most members of local stakeholder boards do not have the expertise to do this and, even if they do, it is not within their remit – it is the responsibility of the Quality of Education Trust Board Committees to monitor standards with contribution from local stakeholder board members.

It is important for those governing to avoid giving the impression that they are there to judge or inspect teachers' performance. As the [Governance Handbook](#) states:

"Governors are not inspectors and it is not their role to assess the quality or method of teaching or extent of learning".

How often should governors visit?

The [Governance Handbook](#) states, those visiting "should make sure they do not interfere in the day-to-day running of the school".

The Dartmoor Multi Academy Trust follows the NGA recommendation that:

- each individual local stakeholder board member visits a school at least once a year, and;
- each school should be visited a minimum of once a term by at least one member of the Local Stakeholder board.

Visit windows for the whole academic year are shared with meeting dates and visit dates should be planned with the Principal to ensure the schedule is sustainable and pragmatic. In clusters, visits should ensure all schools are represented but there is no expectation that *all* local members visit *all* the schools.

Each school within the trust will receive at least one annual visit from a trustee. As well as providing the MAT board with greater visibility within its schools, school visits will also give trustees valuable insight in to the implementation of the MAT wide vision and strategy and provide assurances governance arrangements are effective.

Individuals may also spend time in school in a non-governance capacity. Parent governors, trustees or local stakeholder members will visit the school in relation to their child's education, staff governors for their jobs, and other local stakeholder board members may volunteer in the schools in other ways (such as listening to children read). Governors acknowledge that these roles are separate from that of governing and are clear about when they are visiting in a governance capacity.

What should Governors do on a visit?

Governors, trustees and local stakeholder board members do not have the right to visit the school unannounced and it is vital to plan school visits in advance, especially if they involve visiting classrooms. Visits should be part of a planned programme agreed by the whole local stakeholder board and linking to the school strategy. Having a clear protocol in place that is understood by all ensures a disproportionate amount of time isn't spent planning each visit.

Each member of staff who will be involved in the visit should also know the purpose of the visit and what to expect. This should be coordinated directly through the headteacher who will confirm details of the visit with the staff member themselves.

All governors will be expected to follow the Trust's code of conduct and any school specific of conduct. Governors should also be aware of the school's safeguarding procedures and report any concerns to a member of staff. Inappropriate behaviour should be reported to a member of staff.

Are visits to classrooms needed?

This guidance is primarily based on schools visits where a member of the local stakeholder board is 'hosted' by a senior or middle leader, perhaps to discuss directly with them a specific area or school responsibility or to see how agreed improvement plans are being implemented. However where agreed, a visit to a classroom may still be in order, not to observe lessons, but as a means of assisting governors to get to know their school in the broader sense.

Examples could include getting to know the school's behaviour policy in action, or a visit specifically focused on the strategic priorities around the developments of premises and resources e.g. establishing that all the pupils can actually fit into the classroom and are adequately resourced.

Reviewing school visits

After each visit, governors should reflect on the information learned from the visits and share at the next local stakeholder board meeting, as well as more generally on an annual basis. Areas to consider include:

- Are our visits proving useful?
- What benefits, particularly unexpected benefits, have come from our visits?
- Are we better informed and enabled to make sensible decisions?
- Is there anything we need to change about how visits are conducted, taking into account feedback from school staff?
- What should I do if I have concerns about staff?

Those governing should have the opportunity to discuss the visit, including any concerns, with the principal immediately or soon after the visit.

The 'Governor Visit Report' (Appendix 1) should be completed after each visit. A draft will be shared with the principal for them to add their feedback with a final version will be included in the papers for discussion in the next local stakeholder board meeting.

Confidentiality

Confidentiality should be adhered to regarding visits. Comments should be limited to the principal or senior or middle leader with who the visit was arranged but not with other staff or with parents. Individual children or staff members (other than the member of staff involved with the visit) should not be identified in school visit reports.

Do's and Don'ts

A guide to what those governing should and shouldn't do before, during, and after a school visit.

	Do	Don't
Before	<ul style="list-style-type: none"> ✓ Discuss the visit at a local stakeholder board meeting, including identifying a clear purpose. (It can be useful to think of the stakeholder board as 'commissioning' the visit and delegating responsibility for carrying it out to individual governor(s).) ✓ Arrange a mutually convenient time, avoiding sensitive times such as exam or assessment periods. ✓ Discuss the visit with the principal and ensure that any member of staff who will be involved in the visit understands the arrangements. 	<ul style="list-style-type: none"> × Turn up unannounced. × Approach staff directly without the approval of the principal
During	<ul style="list-style-type: none"> ✓ Present yourself in a way which matches the professionalism expected of school staff. ✓ Report to reception and follow procedures for visitors – even those familiar with the school should do this. ✓ Only enter classrooms and other areas of the school – including the staffroom – following invitation by a member of staff. ✓ Keep to the role agreed; only talk to students if invited to do so by the teacher ✓ Be flexible if something urgent crops up which means the arranged tasks cannot take place – always keep in mind that the education of the students is of overriding importance. ✓ Be courteous and professional throughout the visit, including thanking members of staff before leaving. 	<ul style="list-style-type: none"> × Don't turn up in shorts, immodest shirt, flip flops × Give the impression that you are reviewing, for example by using a clipboard or making notes while visiting a classroom. × Assume a different role to that agreed; parents and education professionals, in particular, should be mindful not to stray into these roles. × Express personal opinions if pressed on a controversial issue – individuals should keep in mind that they are representing the governing board as a whole. × Make assumptions – always ask for explanations of anything not understood at an appropriate time when it will not interrupt pupils' learning (this may be in conversation with the class teacher after the lesson or with the headteacher at the end of the visit). × Check on the progress of individual children, including your own. × Walk around the school unaccompanied or put yourself in situations where you are likely to be unaccompanied with pupils.
After	<ul style="list-style-type: none"> ✓ Share any concerns, however trivial, with the chair and the principal. ✓ Complete a short visit report using a form in annex 2; a draft should be shared with any relevant members of staff and the principal, then taking their comments into account a final written report should be prepared and given to the local stakeholder board before the next meeting. ✓ Ensure that school visits are an agenda item at the local stakeholder board meeting and that any findings are discussed ✓ Send a thank you email to those that contributed to the success of the visit. 	<ul style="list-style-type: none"> × Make comments regarding the teacher's conduct of the lesson or individual students. × Refer to individual teachers or students in your report, even in a positive light. × Gossip about your visit – what you have seen should be treated with the same level of confidentiality as any other stakeholder board business.

ANNEX 2: Governor Visit Report



LSB Governor Visit Record

School Completing visit for:		Monitoring area:	
Name of Governor(s) present:		Date of visit:	
		Length of visit:	

Purpose of visit:

Outstanding actions from previous visit: <i>Ensure you list any action points or areas that require monitoring from the previous visit</i>	Actions carried forward to next visit (with agreed dates)



Questions and responses: <i>Ensure you have reviewed the previous visit form to capture any actions</i>	Evidence gained:

Observations noticed during the visit: <i>Please note any positive or negative general observations whilst completing the visit</i>



If the visit is not Safeguarding / SIAMS specific, please still considering during your visit and note anything relevant in the area below:

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Key Indicators: *(check the previous report to note the risks and challenges and whether these have been addressed)*

Risks: *(please highlight any key risks noted during the visit)*

Challenges made during meeting: *(please note where and how challenges were made)*

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**Feedback for Headteacher:****Principal Comments:***Name of Principal:**Date reviewed by HT:*

NB: Principal comments to be captured before the record form is sent to the Clerk for inclusion at the next scheduled LSB meeting