



## **BORDEN GRAMMAR SCHOOL Trustee Visit Protocol**

<b>Date Drawn up</b>	<b>May 2021</b>
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<b>Devised/revised by</b>	<b>Sarah Mendoza (using the NGA model policy)</b>
<b>Date Ratified by Full Board</b>	<b>14 May 2021</b>
<b>Frequency of Review</b>	<b>Biannual</b>
<b>Next Review Date</b>	<b>13 May 2023</b>

## Model Visit Protocol

### Introduction

Academy Trust boards have three core functions:

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

This protocol 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.

### Purpose

All school visits will:

Have a clear focus, linked to strategic priorities, which is agreed by the full governing board

Be arranged with adequate notice through the headteacher and agreed with the relevant members of staff

Be of value to the trust board which is demonstrable to outside agencies e.g. Ofsted or the LA It is not the role of those governing to form judgements about the performance of school staff during visits and individuals will make every effort to avoid this impression.

### Conduct

Those governing will comply with the school and trust board's codes of conduct and the standards of presentation expected of staff. They will be mindful that they are representing the whole trust board through their words and actions.

## Follow-up

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

The attached 'Trustee Visit Report' will be completed after each visit. A draft will be shared with the headteacher and any other members of staff involved in the visit and, when agreed, a final version will be included in the papers for discussion in the next trust board meeting (this may be the full trust board or a committee, as appropriate).

## Confidentiality

Confidentiality should be adhered to regarding visits. Comments should be limited to the headteacher 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.

## Frequency

Trustees will undertake a minimum of one visit to the school per academic year but no more than once a term.

## Review

This protocol should be reviewed by the governing board every academic year.

## Appendix 1: Model Visit Report

Name:

Date:

Focus of visit (link to strategy and school development plan)
Summary of activities e.g. talking to staff and pupils, looking at specific resources, having lunch etc.
What have I learned as a result of my visit? (Relate this back to focus of visit)
Aspects I would like clarified/questions that I have:
Actions for the trust board to consider:

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Any other comments/ideas for future visits:

Signed \_\_\_\_\_ (Trustee)

## Appendix 2: Useful Information for Trustees on School Visits

### Introduction

Visits to schools by trustees in their strategic, not operational role ensures that the schools vision is being turned into reality, ethos is being embedded and progress is being made against the strategic plan. At the heart of this is one of NGA's [eight elements of effective governance](#): knowing the school – the data, the staff, the parents, the children and the community.

There are numerous ways those governing can know their school or schools, for example, through analysing pupil data, receiving feedback from the headteacher, 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.

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.

The Department for Education's (DfE's) [Governance Handbook](#) (November 2015) states that:

### 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 trustee 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 vision and strategy formulated by the governing board (see [A Framework for Governance](#) for more on formulating and monitoring the strategy).

Visits should involve the member of staff responsible for the objective or target meeting with the trustee(s) 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:

- The use of resources such as how the premises are utilised, a new teaching resource in action or a demonstration of an IT system)
- Monitoring the implementation of a particular policy for example safeguarding, homework, lesson planning
- Monitoring progress towards specific targets from the school/academy development plan for example meeting with the subject lead of an area for improvement and learning about the strategy adopted and how this translates through to classroom practice and children's learning
- Gaining an understanding of a particular curriculum area or year group
- Gaining an understanding of the process of assessment and tracking pupil cohorts
- 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

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 trust board should not be confused with inspections. For example, if the focus of the visit is the Health and Safety 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 health and safety is audited and how the findings are acted upon.

It is not within the remit of the trust board for individual members of the board to tour the school carrying out health and safety checks. Even if you have this expertise through your job, this should be left to professionals contracted by the school for that purpose.

The itinerary will follow from the focus: for most a meeting with the relevant member(s) of staff will be involved; for some, spending time in a classroom talking to the children about their work or the resources they use may be an appropriate part of the visit. Sometimes a focus group of children or staff would be useful for example if you were exploring attitudes to an attendance policy.

Most of the time school visits will have a key focus on the trust boards monitoring role, but there are some occasions where this won't necessarily always be the case. For example, a new member of the trust board 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 trust board to meet with these groups or sit in on meetings. For more on engagement with parents, see the [Knowing Your School: Getting to know your parents](#) briefing.

It can be easy to fall into the trap of referring to a school visit as a chance to "observe" teaching and learning – but by doing so; you could be causing 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 headteacher or appropriate line managers.

Most members of trust boards do not have the expertise to do this and, even if they do, it is not within their remit. 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:

While Ofsted's inspection handbook makes no explicit reference to governors, trustees or governing committee members visiting their schools, inspectors will be looking for evidence of how well trust boards know their school and learning from visits can form an important part of this. Confusion around this has sometimes been compounded by some Ofsted inspectors.

Feedback from members and published reports has made NGA aware that trust board members are sometimes asked whether they visit lessons to understand the quality of teaching, and comments that appear to praise this practice can make their way into reports. Ofsted's National Director for Education, Sean Hartford, clarified that this is not the inspectorate's policy in his [blog on the Ofsted website](#) in October 2015:

When speaking to inspectors, Trustees should be confident about what they are doing in visiting the school – and confident in why they are not engaging in operational activities.

The key message is that when visiting the school, a protocol and a clear focus should be in place that is understood and agreed by all involved.

There may also be visits to the school for less formal occasions such as school plays or celebration events. Governing boards may choose not to count these as formal visits but visiting governors should nevertheless follow the school visits' protocol as appropriate.

There is no need for those governing to be in school every week – as the [Governance Handbook](#) states, those visiting “should make sure they do not interfere in the day-to-day running of the school”. It can therefore be useful for the governing board to set a minimum and maximum number of visits that individuals should make each school year. **NGA recommends that each individual board member visits the school at least once a year but no more than once a term.** This not only keeps visits to a sustainable and pragmatic level but will also ensure that those visits are spread out over the academic year.

A visit does not need to mean spending the whole day in school; while you do not want to be rushing in and out, for most purposes a well-planned and utilised hour at the beginning or end of the school day can be sufficient for a productive visit and should be manageable for those with work schedules or family responsibilities to juggle.

Of course, individuals may also spend time in school in a non-governance capacity. Parent trustees will visit the school in relation to their child's education, staff trustees for their jobs, and other trust board members may volunteer in the schools in other ways. It is important to keep these roles separate from that of governance and to be clear about when you are visiting in a governance capacity.

### **What should be done on a visit?**

Trustees and 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 board and linked to the school strategy/development plan. 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.

As well as the more obvious questions of where, who, and what, those governing should establish the finer details of how they will be expected to conduct themselves in order to ensure that everyone is comfortable and confident about the visit. They should also be familiar with the school's code of conduct as well as that of the trust board, and may wish to ask specific questions such as:

Where should I go on arrival at the school?

Who will meet me and introduce me to the relevant staff member?

How would you like me to be introduced to pupils i.e. by first name or Ms/Mr X?

How should I address staff i.e. by first name or Ms/Mr X?

What should I do if a pupil asks for help?

What should I do if I see a pupil behaving inappropriately?

### Are visits to classrooms needed?

This guidance is primarily based on schools' visits where a member of the trust 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 trustees to get to know their school in the broader sense.

Examples could include getting to know the schools 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 to the school, individuals should take time to reflect and consider anything they might do differently in future visits.
- The trust board should review their school visits protocol every academic year. The review should consider:

- Are our visits proving           ?
- 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?

- Following a visit

Complete a short visit report using the form in [appendix 1](#); a draft should be shared with any relevant members of staff and the headteacher, then taking their comments into account a final written report should be prepared and given to the governing board before the next meeting.

- Ensure that school visits is an agenda item at the governing board meeting and that any findings are discussed
- Send a thank you email to those that contributed to the success of the visit.
- Share any concerns, however trivial, with the chair