



Trustees and Governors Visit Policy

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Contents

1. Introduction	1
2. Setting expectations for visits	2
3. How often should Governors and Trustees visit?	3
4. What should Trustees /Governors do on a visit?	3
5. Are visits to classrooms needed?	4
6. Reviewing Academy visits.....	4
7. Confidentiality.....	5
8. Policy Review Statement:.....	5
Appendix A - Do's and Don'ts.....	6
Appendix B – Trustee/ Governor Visit Report.....	8

1. Introduction

This policy applies to Trustees and Local Advisory Board (LAB) Governors.

The Board of Trustees have three core governance functions:

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

Some of these functions are delegated to the LAB as defined in the Trust Governance Handbook and Scheme of Delegation.

Trustees and LAB Governors draw on a range of evidence to carry out governance functions, and one source of information is Academy visits.

ONE Multi Academies Trust recognises that visits to academies by those governing can be enormously helpful in carrying out their role. That role is strategic, not operational, and includes ensuring the vision is being turned into reality, ethos is being embedded, and progress is being made against the strategic plan.

Academy visits are a key aspect of one of the National Governance Association's eight elements of effective governance: Knowing the Academy. Governors can gain knowledge of their academy or academies in various ways, such as by analysing pupil data, receiving reports from the Principal, and gathering feedback from parents, staff, and pupils. However, visiting the Academy in person offers valuable firsthand insight into its daily operations and helps to contextualise other sources of information.

A well-planned programme of visits forms a critical element of the Trustees and Governors strategic role. While Ofsted's inspection handbook makes no explicit reference to Trustees, or Governors visiting their Academy, inspectors will be looking for evidence of how well Trustees and local Governors know their Academy, and learning from visits can form an essential part of this. When speaking to inspectors, those governing should be confident about what they are doing in visiting the Academy and confident in why they are not engaging in operational activities.

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

This policy applies to Academy visits in a governance role and not to visits to the Academy site that individuals may make in other capacities e.g. as parents or staff members.

2. Setting expectations for visits

Every visit should have a clear, prearranged focus with a set agenda. This is important because it helps those governing use their time and that of Academy staff productively. The focus of the visit will generally relate to the Trustee/LAB Governors monitoring of the Academy strategy or to developing a rounded understanding of the Academy'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 Trustee or Governor to provide background information and context, showing the initiative in action, and if possible, providing the opportunity for them to speak to pupils or staff members.

Examples of what a visit could focus on or 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 etc.
- Monitoring progress towards specific targets from the Academy/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 pupil'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 specific issue (e.g., provision of ICT, student achievement, literacy) is dealt with on a day-to-day basis
- Gaining an understanding of how vulnerable groups are supported (Pupil Premium, SEND LAC etc).

During any visit to the Academy, it is important to remember that **those in governing roles are strategic, not operational**. Visits by Trustees/ Governors 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 the staff is 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 are audited and how the findings are acted upon. It is not within the remit of a Governor / Trustee to tour the Academy carrying out health and safety checks.

Most of the time, Academy visits will have a key focus with a set agenda, however there are some occasions where this won't necessarily always be the case. For example, a new Trustee or Governor may 'tour' the Academy as part of their induction, or those governing may attend a parents' evening as a means of engaging with parents. If the Academy has parent or pupil councils, it can be helpful for the Trustees /Governors 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 an Academy 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 an Academy context: it is an activity undertaken by Academy leaders to collect evidence about teachers' performance for appraisal. This is, of course, a professional task and should be carried out by the Principal or appropriate line managers.

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

3. How often should Governors and Trustees visit?

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

ONE Multi Academies Trust follows the National Governance Association (NGA) recommendation that:

- Each board Trustee visits an Academy at least once a year, and.
- Each academy should be visited a minimum of once a term by at least one local Governor.

Visits should be planned with the Principal to ensure they are spread out over the academic year and that the schedule is sustainable and pragmatic. The Principal is responsible for ensuring that all visits have a clear agenda which is shared in advance.

Each Academy within the Trust will receive at least one annual visit from a Trustee. Visits will also give Trustees valuable insight into the implementation of the Trust-wide vision and strategy and provide assurances governance arrangements are effective.

Individuals may also spend time at the Academy in roles that are not related to governance. For example, Parent Governors and Trustees may visit the Academy regarding their child's education, staff Governors may be there for their work responsibilities, and other LAB Board Governors may volunteer in various ways, such as by listening to children read. Governors understand that these activities are distinct from their governance duties and are clear about when they are acting in a governance capacity.

4. What should Trustees /Governors do on a visit?

Trustees/ Governors do not have the right to visit the Academy unannounced. It is vital to plan Academy visits in advance with the Principal, especially if they involve visiting classrooms. Visits should be part of a schedule agreed by the Trust Board / LAB and linked to the Academy/Trust 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 Principal who will confirm details of the visit with the staff member themselves.

All Trustees /Governors will be expected to follow the Trust's Code of Conduct and any Academy-specific Code of Conduct. Trustees /Governors should also be aware of the Academy's safeguarding procedures and report any concerns to a Principal /staff member. Inappropriate behaviour should be reported to a member of staff. Governors and Trustees should not make comments directly to Teachers / Staff.

5. Are visits to classrooms needed?

This guidance is primarily based on Academy visits where Trustees /Governors 'hosted' by Principal / senior or middle leader, perhaps to directly discuss a specific area or Academy responsibility or 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 /Governors in getting to know their Academy in the broader sense.

Examples could include getting to know the Academy'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 fit into the classroom adequately resourced.

6. Reviewing Academy visits

After each visit, Trustees /Governors should reflect on the information learned from the visits and share it at the next Board /LAB meeting.

Areas to consider include:

Are visits useful and impactful?

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, considering feedback from Academy 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 'Visit Report' (Appendix B) should be completed as soon as possible after each visit. A draft will be shared with the Principal / Chair of Trustees / Chair of LAB and the Trust Governance Professional and any other staff members involved in the visit. When agreed, a final version will be included in the papers for discussion in the next Board / LAB meeting.

7. Confidentiality

Confidentiality should be maintained 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 pupils or staff members (other than the member of staff involved with the visit) should not be identified in Academy visit reports.

8. Policy Review Statement:

This policy will be reviewed to ensure it remains up-to-date, relevant, and aligned with the Trust's strategic objectives, regulatory requirements, and best practices. The review process will be conducted as follows:

- **Policy Owner Review**
The Policy Owner will conduct an initial review to assess any necessary updates or amendments.
- **Executive Team Policy Committee**
The revised policy will be presented to the Executive Team Policy Committee for further evaluation and recommendations.
- **Trust Board Approval**
Following review and necessary revisions, the policy will be submitted for formal approval by the Trust Board in accordance with the scheduled review cycle.

For details on the specific review schedule, please refer to the review table on the front page.

Appendix A - Do's and Don'ts

A guide to what those Governing should and shouldn't do before, during, and after an Academy visit.

	Do	Don't
B e f o r e	<p>Discuss the visit at a LAB / Trust Board meeting, including identifying a clear purpose.</p> <p>Arrange a mutually convenient time, avoiding sensitive times such as an exam or assessment periods.</p> <p>Discuss the visit with the Principal and ensure that any member of staff who will be involved in the visit understands the arrangements.</p>	<p>× Turn up unannounced.</p> <p>× Approach staff directly without the approval of the Principal</p>
D u r i n g	<p>Present yourself in a way that matches the professionalism expected of the Academy staff.</p> <p>Report to reception and follow procedures for visitors – even those familiar with the Academy should do this.</p> <p>Only enter classrooms and other areas of the Academy – including the staffroom – following an invitation by a staff member.</p> <p>Keep to the role agreed; only talk to students if invited to do so by the teacher</p> <p>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.</p> <p>Be courteous and professional throughout the visit, including thanking members of staff before leaving.</p>	<p>Don't turn up in shorts, immodest shirt, flip flops. Give the impression that you are inspecting by using a clipboard or making notes while visiting a classroom.</p> <p>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 represent as a whole.</p> <p>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).</p> <p>Check on the progress of individual children, including your own.</p> <p>Walk around the Academy unaccompanied or put yourself in situations where you are likely to be unaccompanied with pupils.</p>

A f t e r	<p>Share any concerns, however trivial, with the Chair and the Principal.</p> <p>Complete a short visit report using a form like the one in annex 2; a draft should be shared with any relevant members of staff and the Principal of Academy, then taking them comments into account, a final written report should be prepared and given to the LAB / Trust Board before the next meeting.</p> <p>Ensure that Academy visits are an agenda item at the LAB/ Trust Board meeting and that any findings are discussed</p> <p>Send a thank-you email to those that contributed to the success of the visit.</p>	<p>Make comments regarding the teacher's conduct of the lesson or individual students.</p> <p>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.</p>
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Appendix B – Trustee/ Governor Visit Report

Name(s):	Date of visit:
Trustee / Governor	
Academy Name:	

Purpose of visit:

Links to Academy Improvement Plan/ Academy Evaluation/Termly Visit Plan:

Timetable of visit:

Key personnel to meet:		
Name	Position	Completed

Summary of activities, e.g., talking to staff and pupils, looking at specific resources, having lunch, etc.
<u>Follow-up actions from the last visit:</u>
Observations/evaluations to include views on Student books and outcomes from conversations with Students:

Key questions/issues to explore to include compliance with statutory obligations, operation of policies and inclusion of SMSC:

What have I learned as a result of my visit? (relate this to the focus of the visit)

Any key issues arising for Trust Board / Local Advisory Board (LAB):

Actions following the visit:

Signed:	Date:
Trustee /Governor	
Principal/ SLT	

Please share a copy of this form with the Principal and the Trust Governance Professional

Summary Guidance when Conducting a Visit

	Always	Never
Before	<ul style="list-style-type: none"> • Agree purpose of visit • Arrange details of visit with Principal/SLT/Staff member • Agree on any information required • Allow sufficient time for the information to be prepared/presented • Agree level of confidentiality • Understand the context of the lesson to be observed 	<ul style="list-style-type: none"> • Turn up unannounced
During	<ul style="list-style-type: none"> • Minimise disruption to the school • Fulfil agreed purpose 	<ul style="list-style-type: none"> • Walk in with a clipboard • Interrupt the teacher • Make comment on the lesson with the students
After	<ul style="list-style-type: none"> • Discuss observations with teacher • Thank the staff and students • Provide feedback to the Principal after the visit. • Clear the draft report with the Principal /SLT liaison before issuing. 	<ul style="list-style-type: none"> • Make sweeping generalisations from one lesson • Leave without a word