



# Trustee & Governor Academy Visits Policy

## 2025/2026 Academic Year

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### 1. Aims

This policy aims to set and maintain standards of conduct that we expect all trustees and governors to follow when making visits to Spa Education Trust (the Trust). Trustees and governors are invited guests and are welcome to arrange visits to our academies.

This policy sets out the procedure which all trustees and governors are expected to follow when visiting provisions across the trust and how they are expected to report back on that visit to the Board of Trustees (the Board). By creating this policy, we aim to ensure that all trustees and governors understand their role and purpose so visits are a productive and enjoyable event for all involved.

### 2. Guidance and scope

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This policy takes account of best practice and guidance from the [Academy trust governance guide](#).

## 2.1 Trustees and governors are observers

The Board must know their academies in order to maintain robust accountability. Through pre-arranged visits that have a clear focus, trustees and governors will:

- Observe whether the academies are properly implementing policies, and actions from the trust improvement plan
- Observe how those procedures are working in practice
- Have the opportunity to gather the views of pupils and staff

## 2.2 Trustees and governors are not inspectors

Trustees and governors:

- Will not assess the quality of teaching and learning in the classroom
- Will not manage the trust or interfere in the day-to-day operations of the academies. For those trustees and governors who wish to spend time in a classroom, they will make it clear about their purpose in doing so

## 3. Visits programme

Trustees and governors will carry out regular visits in order to meet the Board's statutory obligation to monitor the academies' effectiveness. There are two types of visits:

- **Formal monitoring visits**, where trustees and governors discuss the progress of the academy in a particular area with the relevant staff member
- **Learning walks**, where trustees and governors will go around the academy 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 and governors will carry out academy visits according to the following schedule:

Autumn Term	Spring Term	Summer Term
Subject lead learning walk	Subject lead learning walk	Subject lead learning walk
Monitoring visit: safeguarding	Monitoring visit: safeguarding	Monitoring visit: safeguarding

Monitoring visit: SDP SEF	Monitoring visit: SDP SEF	Monitoring visit: SDP SEF
Academy event	Academy event	Academy event

### **3.1 Trustees and governors for health and safety, special educational needs, and safeguarding**

These trustees and governors 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 and governors**

Subject lead trustees and governors will attend:

- A monitoring visit with the subject lead in September / February / May
- A learning walk in October / March / June
- A monitoring visit related a focus of the SDP / SEF

### **3.3 All trustees and governors**

All trustees and governors will:

- Carry out at least one learning walk each year
- Attend at least one academy event in the year

## **4. Before a visit**

Trustees and governors will:

- Arrange visits directly with the Headteacher
- The Headteacher will inform the Executive Headteacher and coordinate the relevant staff availability. Generally, 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 the Headteacher ahead of the visit
- Send questions in advance to the staff member so everyone can feel properly prepared
- Be familiar with the trust's safeguarding policies and procedures

## **5. During a visit**

Trustees and governors will be supported by a member of staff at all times during their visits to minimise disruption for staff and pupils and to receive the maximum benefit from the time spent.

### **Trustees and governors will:**

- Be on time and meet with the Headteacher on arrival
- Be provided with a visitor's badge
- Use the agreed recording method for the visit. Photographs and videos are to be avoided unless specifically agreed with the Headteacher
- Remain as observers; they are not there to pass judgement on staff or inspect them
- Ensure all parties are clear about why a trustee or governor 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 and governors 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 trust
- 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 and governors should note down any concerns they may have and raise them with the Chair of Trustees or the Executive Headteacher after the visit

## **6. After a visit**

Trustees and governors will complete a written report as soon as reasonably practicable [using the form attached as Appendix A (monitoring visit) or Appendix B (learning walk)], as appropriate. In completing the report, trustees and governors 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 and governors will submit their reports to:

- The Executive Headteacher and Headteacher
- The Chair of Trustees and the relevant committee, as agreed

## **7. Monitoring arrangements**

The Operations Committee is responsible for the implementation of this policy. The policy will be reviewed and approved every year.

## Appendix 1: Template report for a monitoring visit

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



### Spa Education Trust

#### Trustee and Governor 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	
<b>Name and role of Trustee or Governor</b>	
<b>Name and role of staff member(s)</b>	
<b>Date and time of visit</b>	
<b>Agreed focus</b> <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>	
<b>Relevant school objective or priority</b> <i>This might be taken from the school development plan / SEF / previous head's reports / related to the school vision.</i>	

**Questions to ask**

*Note specific questions you want to ask based on the SDP, 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.*

## Part 2: in the meeting

### What is the school doing within this area of focus?

#### *Tips:*

- *Ask open questions beginning with 'what', 'how', 'when', 'how often', 'why', 'who' and 'where'*
- *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 hasn't been made yet, note down why that is and what steps are being taken to make progress*
- *Add any further evidence you'd like to see to help you make a better assessment of the impact*



What successes stood out and why?

Questions and clarifications to follow up with the Head of School or Chair of Trustees

## Appendix 2: Template report for a learning walk



### Spa Education Trust

#### Governor / Trustee learning walk

Learning walks are where you'll go around the school with the relevant staff member to get a feel for a particular area. You're likely to talk to a range of staff members and pupils. Use this as a reminder of what to look for and what to ask

Part 1: plan the walk	
<b>Name and role of trustee or governor</b>	
<b>Name and role of staff member(s)</b>	
<b>Date and time of visit</b>	
<b>Agreed focus</b> <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.
<b>Relevant school objective or priority</b> <i>This might be taken from the school development plan (SDP) objectives or the school's overarching vision.</i>	Percentage of pupils achieving 'greater depth' in writing improves at KS2.
<b>Questions to ask</b> <i>Note specific questions you want to ask based on the SDP, 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 governors' 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*

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What successes stood out on the learning walk and why?

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Questions and clarifications to follow up with the headteacher or chair of governors

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