



## Member, Trustee and Governor Visits Policy

Approved by Trust Board on: 27<sup>th</sup> September 2023

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## 1. Purpose of this Policy

1.1. The purpose of this policy is to provide a framework for Trustees and Governors to make focused visits to Trust schools, so that they can build an effective working relationship with Trust and school staff and have a better understanding of the context in which they work. Trustees and Governors will observe policies and plans being implemented on a day-to-day basis, and their findings should help the Trust Board and Local Governing Body (LGB) and their committees make well informed judgments about the progress being made towards the priorities and targets in the Trust's plans and school development plans. This process will enable the Trust Board and Local Governing Body to recognise and celebrate achievements and to identify further areas for development.

1.2. The Board of Saracens Multi-Academy Trust is responsible for:

- Development and determination of the Trust's strategy, educational vision, ethos and principles.
- Operation of the Trust, within the statutory and regulatory framework and in accordance with the terms of the funding agreements
- Ensuring Trust's funds are used in accordance with the Articles of Association, the funding agreements and the Academies Financial Handbook
- Ensuring stewardship of public funds to achieve economy, efficiency and effectiveness

1.3. Local Governing Bodies are responsible for:

- Implementing the Trust's strategy, educational vision, ethos and principles.
- Monitoring of the school development plan
- Supporting the CEO in holding the Principal 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.

1.4. Governors, trustees and local governing committee 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.

1.5. 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.

**1.6. All visits must be arranged and agreed in advance with the Principal (in the case of a school) or with the Chief Executive Officer (CEO) in respect of the Trust offices.**

1.7. There are two kinds of governor visits – **formal** and **informal**.

## 2. Informal Visits

2.1. Trustees and Governors on informal visits attend in a personal capacity, much as a parent might do, **but always with the knowledge and approval of the Principal**. Such visits add to the individual's knowledge and understanding of the school and can strengthen relationships and foster trust and respect between Trustees, Governors and staff. Informal visits can take many forms, for example, attending a play, concert or sports day; helping on school trips or assisting with fundraising.

2.2. Informal visits should complement, but not be instead of formal visits.

## 3. Formal Visits

3.1. Working with the Principal, the Local Governing Body will arrange a schedule of visits throughout the year. The aim will be to achieve a minimum of one visit per Committee per year. Governors will visit in a supportive, non-judgemental manner to gather information and gain first-hand experience of issues relevant to sections of the school development plan. Governors' school visits will not be confined to the classroom. Governors should consider a series of different types of visits, some of which are focused on the classroom but others might include, for example, the playground, the school environment, Keeping Children Safe Online, provision of special needs education, attending a school assembly or reporting on a school's enrichment activities.

3.2. Individual governors or pairs of governors will, with the guidance of the whole governing body, identify an aspect of the school's work to focus on. This will enable individual governors to deepen their understanding by focusing on areas where they have an interest or expertise. The aim will be for them to explore an aspect of the school in some detail, increasing their confidence and knowledge. In turn this will help to maximise the effectiveness of the governing body team and to enrich discussions about the school's performance. Governors should be able to demonstrate that through their visits they add value to the work of the Local Governing Body.

3.3. Trustees will also undertake visits to schools and the Trust offices to gather information and gain first-hand experience of issues within schools and the Trust administration. **Trustees and Governors will confirm with the Principal (and where appropriate the CEO) the date, timing and focus of each visit including agreeing what will be observed and to whom they will talk.** Trustees and Governors will prepare for the visit by reading relevant documentation and guidance.

3.4. All school and Trust visits should have a clear focus and be arranged with adequate notice. It is not the role of Trustees and Governors to form judgements about the performance of school and Trust staff during visits and individuals will make every effort to avoid this impression. Visits are not about making judgments on the quality of teaching or the management techniques; that is the Principal's and CEO's responsibility. Nor are they about checking on the progress of individual children or pursuing personal agendas.

3.5. Governors and Trustees should avoid making excessive notes, but join in with activities and take the opportunity to talk with staff and pupils. Trustees and Governors will comply

with their respective Codes of Conduct. They should be mindful that they are representing the Trust Board/ Local Governing Body through their words and actions.

3.6. During any periods of lockdown or periods when access to Trust schools are restricted on safety grounds, Trustees and Governors may participate in online meetings with staff and groups of staff in lieu of the arrangements detailed in 3.2 and 3.3.

3.7. The attached '**Trustee/Governor Visit Report**' will be completed after each visit.

## **4. Follow up from Visits**

4.1. Those governing will have the opportunity to discuss the visit, including any concerns, with the Principal and/or CEO immediately or soon after the visit.

4.2. A draft of the Trustee/Governor Visit Report will be shared with the Principal (or CEO as appropriate) and any other members of staff involved in the visit. When agreed, a final version will be included in the papers for discussion in the next Local Governing Body meeting (this may be the full LGB meeting or a committee, as appropriate). Where the report relates to the activities of the Trust offices, the report will be made to the Trust Board.

4.3. Each committee will feedback to the Local Governing Body what monitoring has taken place and evaluate the impact against the school development plan.

## **5. Confidentiality**

5.1. Confidentiality should be adhered to regarding visits. Comments should be limited to the Principal and/or CEO or senior or middle leader with who the visit was arranged, but not with other staff or with parents.

5.2. Individual children or staff members (other than any member of staff involved with the visit) should not be identified in school visit reports.

## **6. Monitoring arrangements**

6.1. This policy will be approved by Board of Trustee and reviewed every two years.

## **7. Links with other policies**

7.1. This document links to:

- Trustee Code of Conduct
- Governor Code of Conduct
- SMAT Scheme of Delegation

## Trustee/Governor Visit Report

<b>Name:</b>	<b>Date:</b>
<b>Focus of visit</b> (relate this to the relevant section of the school development plan)	
<b>Summary of activities</b> e.g. talking to staff and pupils, looking at specific resources, having lunch etc.	
<b>What have I learned as a result of my visit?</b> (relate this back to focus of visit)	
<b>Aspects I would like clarified/questions that I have:</b>	
<b>Actions for the Local Governing Body/Trustee Board to consider:</b>	
<b>Any other comments/ideas for future visits or matters to be drawn to the attention of the CEO:</b>	

**Signed:** \_\_\_\_\_

**(Governor/Trustee)** \_\_\_\_\_