



Athena Learning Trust Trust-wide Trustee and Governor Visit Policy

Review

Reviewed: September 2024

Reviewed by: Governance & Growth Committee

Review Period: 3 years

Purpose

Through this policy, Athena Learning Trust aims to embed effective procedures concerning trustee and governor monitoring visits. Each trustee and governor is expected to make at least one visit during the academic year, demonstrating the board and its committees' roles in the strategic management of our schools by helping to evaluate and improve practice.

Trustee and governor visits inform understanding of schools' practices and procedures, allow opportunities to speak to leaders, pupils and teachers, enable the identification of resource needs, and allow trustees and governors to see the schools' improvement plans in action.

For staff, these visits allow staff the chance to find out more about trustees and governors, provide an opportunity to draw attention to issues or questions they wish to raise, and provide an opportunity to reflect upon and discuss current practice.

Trustees and governors must:

- Respect school staff and pupils.
- Support the Principal and their senior leaders.
- Acknowledge that they represent the board of trustees / local governing body.

By following the agreed principles and procedures, trustee and governor visits will be pleasant, purposeful, and will significantly contribute towards school improvement.

1. Legal framework

This policy has due regard to all relevant legislation and guidance including, but not limited to, the following:

- [The School Governance \(Roles, Procedures and Allowances\) \(England\) Regulations 2013](#)
- [Academy trust governance guide](#)

This policy operates in conjunction with the following policies and documents:

- [Board annual planner](#)
- [Governor annual workflow](#)
- [Governor Visit Proforma](#)
- [Link Governor Template](#)

2. Roles and responsibilities

Trustees and governors will be responsible for:

- Making at least one visit per academic year.
- Understanding the needs of staff members through discussions with at least one staff member per academic year.
- Reporting their observations to the board of trustees or their governing body during a meetings.
- Familiarising themselves with this policy as part of their induction programme.

The Principal will be responsible for:

- Facilitating trustee and governor visits.
- Discussing completed visits with trustees and governors, prior to a report being made to the board of trustees or local governing body.

Trustees will:

- Visit a local governing body meeting at least once per year and additionally upon request of the LGB.

Preparing for a visit

Trustees and governors will never visit the school unannounced – they will be expected to arrange visits at least one week prior to the date of the proposed visit. Trustees and governors will remain flexible and understand that the school must make pupils' education the priority, and that this may sometimes lead to the rearranging of visits.

Before a visit, trustees and governors will:

- Agree a clear, purposeful focus for the visit.
- Consider how the area of focus will be identified and observed during the visit.
- Discuss the context of the activities to be observed.
- Agree their role within the activities.
- Refer to their Board or LGB workflow to ensure the visit's focus is strategic and in line with the school's priorities for improvement.
- Read the documentation relevant to the focus of the visit, e.g. the school's Behaviour Policy, and prepare relevant questions, where appropriate.

During a visit

During a visit, trustees and governors will:

- Adhere to their agreed role at all times.
- Make sure they do not interfere in the day-to-day running of the school.
- Where visiting activities involve lesson observations, not ask questions, interrupt the teacher or distract pupils during the lesson.
- Spend time in a classroom only when they have provided a clear reason for doing so.
- Adhere to confidentiality agreements.
- Adhere to the agreed times and purpose.
- Be sensitive to the needs of the pupils and the wider school community.
- Avoid visiting classrooms where their own children are present.

During a visit, trustees and governors will not:

- Make judgements concerning teaching or other areas of school provision in any official capacity.
- Pursue personal agendas during visits.
- Check on individual children or monopolise the time of staff.

After a visit

After a visit, trustees and governors will:

- Thank the staff, and pupils where appropriate, involved in the visiting activities.
- Share feedback and observations on the visit with the staff involved in the visiting activity at their convenience.
- Provide feedback regarding the visit to the board or local governing body.

After a visit, trustees and governors will not:

- Break confidentiality agreements.

5. Providing feedback

The trustee or governor will email the staff member a copy of their visit report.

Regarding visit reports, trustees and governors will adhere to the following framework:

- Present their observations
- Provide positive feedback
- Raise any issues
- Invite feedback from the staff member
- Thank staff for the opportunity

Via the report, both the trustee or governor and staff members will be clear as to what information will be shared with the Principal and board.

The Visit Proforma will be completed as soon as possible after the visit. A copy of the completed proforma will be provided to:

- The Principal
- The subject leader
- The relevant staff members
- The clerk to governors/trustees

A copy of the report will be circulated to all trustees or governors via the Head of Governance or the school's clerk to the governing body at the next appropriate board, committee or local governing body meeting.

The board of trustees or governing board will ensure all board members have the opportunity to discuss and ask questions regarding the final report and the visit undertaken.

6. Monitoring and review

This policy will be reviewed every 3 years by trustees on the Governance and Growth Committee.

When reviewing the success of the policy, trustees will take the following into consideration:

- Has every trustee/governor conducted at least one visit during the academic year?
- Has every trustee/governor made links with their allocated subject or link area?
- Has every trustee/governor met with the staff members they are linked to?
- Are visits achieving the desired outcomes?
- What worked well?
- What did not work well?
- Have there been any unexpected benefits?
- How can practice be improved?



Any changes made to this policy will be communicated to all trustees, governors, staff members and relevant stakeholders.