



Trustee Visits Policy

Maximum Effort for Maximum Achievement

Introduction

This policy applies to the monitoring visits made by Trustees and sets out the specific principles, responsibilities and actions that Trustees have agreed in order to fulfil the requirements of informing the Trust Board of the work of the school.

This policy does not apply to visits made for other purposes. Whilst providing Trustees with valuable experience of the school during working days or through discussions with staff at any time, general visits do not fulfil the specific role of monitoring. Trustees are welcome to comment on their experiences from any visit provided they are consistent with the principles set out in this policy, and should therefore consider reviewing this policy before reporting on outcomes of visits at a Trustees' meeting.

This policy applies to monitoring activities both in school and outside, and can cover one or more Trustees working with one or more members of staff.

Visits to school by Trustees during the time that the school is in operation give them important insights that they can gain in no other way. If Trustees are to carry out their role effectively they need to have an understanding of the way schools work and a feel for the dynamics of their particular school. There is no better way of gaining this information than by visiting the school at work. However, although school visits are important for many reasons, they form only one part of the Trustees' wider role.

Policy

The aims of Trustees' monitoring visits are:

- To learn about the school.
- To show those employed in the school that they are interested.
- To reinforce good relationships between Trustees and staff.
- To help fulfil the statutory obligations and accountability role of the Trust Board to monitor and evaluate the effectiveness of the School Development Plan.
- To allow Trustees to view performance data in the context of an understanding of what happens in the classroom.
- To recognise and celebrate success.
- To get to know the children of the school.
- To see policies and scheme of work in action.
- To achieve an understanding of what resources are needed.

The aims of the monitoring visits are **not** about:

- Making judgements about the quality of teaching.
- Checking on progress of own children.
- Pursuing personal agendas.
- Monopolising teachers' time.
- Arriving with inflexible, preconceived ideas on outcomes.

Trustees are a part of the school community, but they nevertheless need to agree any visits to the classroom with the Headteacher.

Trustees monitoring visits must have a purpose, and an outcome in written record form to be shared with those involved and once agreed in that forum, to be shared with all Trustees. Given the Trust Board's obligations under the General Data Protection Regulations and the Data Protection Act 2018, the written outcome can be released unedited to appropriate third parties unless the full Trust Board acts to make the report confidential and agrees a form for release. In such circumstances, the balance between the rights to privacy of individuals is considered against a right of access of information.

The key objective of a monitoring visit is to share the knowledge gained from the visit with all Trustees.

The expectation is that each Trustee will attend one monitoring session per term.

An equality of time served in monitoring is not a goal of this Trust Board, however where a commitment is made by a Trustee to visit and report their findings, all other Trustees share a responsibility to review the report and when appropriate discuss the matter in an appropriate forum.

Roles

The Trust Board believes that the corporate responsibility it holds should be discharged fairly amongst all Trustees. Trustees with specific monitoring roles are agreed by the Trust Board each Autumn term.

Format of Visits

The format of monitoring visits varies according to purpose. Examples are listed for guidance.

1. Monitoring specific aspects of the School Development Plan. This could involve meeting with members of staff, observing lessons, talking to children or work scrutiny. When undertaking tasks such as work scrutiny, Trustees are ordinarily paired with members of the teaching staff to assist with the process.
2. Consultancy. This could be where a Trustee meets with a subject leader to ask questions and note answers. This provides an opportunity to gain a deeper understanding of issues covered.
3. To audit resources. This would happen in a particular curriculum area in order to investigate the use and adequacy of the resources for that area, (books, equipment, practical aids, visual aids, etc). It may include a review of deployment of resources other than those used in the classroom, for example teacher's training aids, a training programme schedule, etc.
4. Specific focus visits e.g. SEN or Health and Safety.
5. Year Group visits. It would be particularly useful for a visit to be made in order to focus on issues to do with progress of pupils towards the key stage SATs. Other class visits could also greatly enhance the Trustees' understanding of the curriculum in operation.
6. Specific Purpose visits. A visit could be made for a particular purpose when discussion at a Trustees meeting shows that there is a need for a follow up.

Process

What a Trustee should do before conducting a monitoring visit:

1. Acquaint themselves with the environment they can expect to be in during the visit, where appropriate research previous visit reports to establish a history of similar monitoring outcomes.
2. Agree with a group (or individual) that will be monitored what the purpose of the visit will be and agree a convenient time and duration.

3. For class visits, ask the teacher to explain the context at the outset, i.e. what are the learning objectives, any specific challenges or outcomes anticipated, and how the teacher would like you to engage with the children. (Appendix 2 Visit Report Form)
4. For curriculum visits to see teaching in practice, obtain a copy of the relevant policy document.
5. For any other visit, ensure preparatory papers are reviewed before attending. It may prove difficult to obtain copies on the day.

What a Trustee should do during a monitoring visit:

1. Avoid sitting on the periphery of activities in a manner similar to inspectors.
2. Join in activities if invited to do so by the responsible person.
3. Be friendly to children and take an interest in their work.
4. Make positive comments if appropriate to children who are engaged in their work.
5. Refrain from making any negative comments to children.
6. Further guidance is listed in Appendix 1 – Protocol for Visits

What a Trustee should do after a monitoring visit:

1. Thank the staff for allowing you conduct the visit. If a class visit, make sure to comment on enjoyable aspects of the lesson.
2. With the staff that have been involved, review the purpose of the visit (set previously) to enable agreement on how the visit should be recorded. If matters arise outside the originally agreed purpose, note them as issues for a future monitoring exercise or Trustee follow up.
3. Complete a monitoring report pro-forma and email an electronic copy to the Headteacher as soon as possible after the monitoring visit. The Headteacher will then distribute the report to Trustees and the Secretary of the Trust Board.

Monitoring and Review

Policy Date: Spring 2022

Review Date: Spring 2025

Appendix 1

Protocol for Classroom Visits

The following gives guidance on the protocols surrounding visits to the classroom by Trustees.

- Ensure that the policy on Trustees' visits and a system for reporting back have been agreed with staff.
- Recognise that classroom visits are primarily for Trustees to gain first-hand knowledge of the school at work.
- Ensure that each visit has an explicit purpose and focus, which have been agreed by all concerned.
- Ensure that there are agreed timescales for Trustees' visits, usually giving at least seven days clear notice.
- Recognise the right for teachers, with the agreement of the Headteacher, to invite Trustees into school for specific purposes if they so wish.
- The Headteacher should provide members of the Trust Board with the relevant background information, i.e. staff names, responsibilities and timetables.
- Recognise that any visit to the classroom can be stressful and disrupts normal classroom working, and that therefore the number of visits should be limited.
- Respect the normal conventions of Trustee confidentiality, in particular issues surrounding named staff or pupils.

For Individual Trustees

- Negotiate a mutually convenient time with the Headteacher and class teacher for the visit and discussion afterwards, recognising that teachers' and Trustees' time is valuable.
- Ensure that any visit has an explicit purpose and focus, which have been agreed with all concerned.
- Avoid stressful periods such as during or just before an Ofsted inspection or examinations.
- Always wear a name badge.
- Avoid attempting to take on a teaching role, or discussing irrelevant issues with the pupils during the lesson.
- Avoid note taking or acting in any way like an inspector or asking unrelated questions. Be aware that your role is that of an observer. Most Trustees are not qualified to make educational judgements.
- Avoid making promises to staff on behalf of the Trust Board.
- Respect the normal conventions of Trustee confidentiality, in particular issues surrounding named staff or pupils.

- Recognise that sometimes it might be appropriate for you to leave the classroom should a situation arise which might become more problematic, e.g. a behaviour outburst.
- Raise any concerns over the visit with the Headteacher.

For Teachers

- Always feel able to suggest an alternative time if the visit is not convenient.
- Ensure that each visit has an explicit purpose and focus, which have been agreed by all concerned.
- Prepare your class for the visit of a Trustee.
- Welcome the Trustee when they arrive in your class.
- Have a seat ready for the Trustee and tell them where it is.
- Be aware that a visit can be stressful for staff and Trustees alike.
- Inform the Trustee if you wish them to be involved in the lesson, and what it would be helpful for them to do.
- Don't leave your Trustee alone with the class, even if they are willing to do so.
- Raise any concerns over the visit with your line manager or Headteacher.

Appendix 2

Buttsbury Junior School

TRUSTEE'S VISIT REPORT FORM

Name:

Date of visit:

Time Spent:

What elements were included in this visit? (Please list all that apply)

Classroom Visit/ Talking to children/Attending Assembly/Talking to Class Teacher/ Looking at Pupils Work/ Looking at displays/Talking to other staff//Meeting with HT/ Meeting with Subject Leader/ Looking at resources/ Attending lunchtime/Other – please specify

Focus of visit:

How does this link with the School Development Plan?

EBIs/Action Points from previous visits:

Discussions prior to visit with teacher/Headteacher/subject leader:

Monitoring findings:

WWW (What Went Well):

EBI (Even Better If):

Summary – with reference to focus of visit:

Signed:

Date

Please email a copy of this report, when completed, to the Headteacher within 14 working days of the visit.