

Trustee/Committee/Member Visits Policy

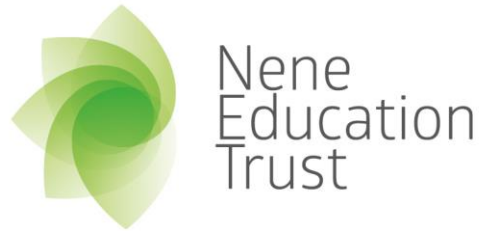
Policy Number 29

Document Management Information

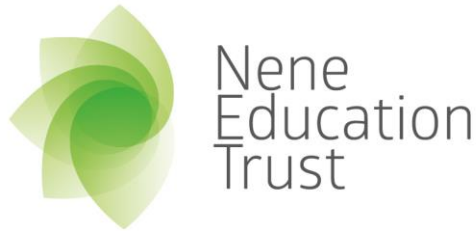
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| Applicable to: | Trustees, Members, Local Committee Members and all staff |
| Dissemination: | Board Meeting, Trust Leader email and governance correspondence channels |
| Linked policies: | 01 - Professional Learning Policy 07 - Trustee and Local Committee Expenses policy Annual Trustee CPD priorities |
| Implementation: | Immediate |
| Training: | None |
| Review Frequency: | Triennially |
| Policy Author: | Trust Executive Assistant/Governance Manager |
| Policy Lead: | Trust Executive Assistant/Governance Manager |
| Approval by: | Trust Board |
| Approval Date: | December 2022 |
| Next Review Due: | Autumn 2025 |

Revision History

| Document version | Description of Revision | Date Approved |
|------------------|--|---------------|
| V1 | Rewrite | Autumn 2018 |
| V2 | Annual review and changes in line with LAB delegation. Changes to the reporting form and general changes to LAB responsibilities for reporting | Winter 2019 |
| V3 | Greater clarity about the expectation of Trustee visits to schools and the protocols | Winter 2020 |
| V4 | Bringing in line with Trustee CPD plan and Trust | Autumn 2022 |



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| | Professional Learning Policy. Requirement for CEO to approve expenditure on CPD from appropriate budget | |
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RATIONALE

The Trust Board and Committees, including Local Committees as delegated, have a statutory responsibility to:

1. Ensure clarity of vision, ethos and strategic direction;
2. Hold the Chief Executive Officer to account for the educational performance of the schools and their students, and the performance management of staff;
3. Oversee the financial performance of the Trust and make sure its money is well spent.

The Trust Board, specifically through the Scheme of Delegation, should monitor schools through attendance at school events.

It should also identify skills within the Trust Board and committees, including Local Committees, addressing any gaps to skills and expertise through recruitment and training. This may involve attendance at relevant training events and workshops at local or national level to further develop themselves in the role.

Local Committees act as the eyes and ears of the Board. Each Committee is expected to know its school in detail: to closely monitor what is happening in the school; to hear from a range of members of staff; to visit the school regularly; and to engage with parents, pupils and the community.

One of the best and most effective ways in which a Trustee or Local Committee member can get to know about their school is to visit during the school day and see it at work.

In addition, the Local Committee has specific link members to support the Principal in assessing the effectiveness of certain aspects of the school and provide information to the Trust staff and the Board. These roles require regular monitoring visits.

These visits are not inspections, and it is not the role of the committee members to hold the Principal to account.

The policy includes a general visit report form aside from the specific link role monitoring forms. All Trustees and Local Committee members undertaking general visits to a school should complete the form as they can be used as feedback to the Board and a formal record to indicate to Ofsted the level of Board and Committee involvement in the life of the school. It should not, however, form part of any other evidence base e.g., a member of staff's performance management.

PROTOCOLS

All general Trustee visits will be facilitated by or at least notified to the Executive Assistant/Governance Manager if arranged directly with the school Principal.

The visits should have a clear purpose, and visit forms completed accordingly and sent to the Executive Assistant/Governance Manager following the visit. Expenses should be claimed in line with the Trustee and Local Committee Expenses Policy.



Link monitoring visits should be arranged directly with the Principal who will arrange with the staff concerned. The monitoring visits should be arranged in line with the agreed cycle of reporting. The link committee member should also notify the Chair of any visits.

Completed link monitoring forms should be shared with the Principal, Chair of the Local Committee and Trust Policy Lead following the visit.

Trustees or Local Committee members wishing to attend training events that incur costs should seek prior approval from the Chair of the Trust Board and advise the CEO to ensure the training identified is in line with CPD needs and there are funds available.

MONITORING AND EVALUATING THE POLICY

The Executive Assistant/Governance Manager will carry out periodic review of this policy to ensure it is in line with the Trust Scheme of Delegation and the DfE Governance Handbook.

TIME OFF WORK TO CARRY OUT VISITS

It is acknowledged that Trustees and Local Committee Members are unpaid volunteers and may find it difficult to take time off work to undertake visits or CPD during working hours. However, this is integral to fulfilling a governance role in education and part of the commitment to the role.

Under employment law, employees are entitled to 'reasonable time off' to carry out their duties as "governors" (Trustees/Local Committee Members).

There needs to be agreement between the employee and employer as to what 'reasonable time off' means in practice. It will be necessary to consider the amount of time needed to carry out the duties; the effects of an employee's absence on the employer's business; and whether time off is given to the employee for other activities. An employer is not obliged to give time off with pay.

EXAMPLES OF VISITS THAT FULFIL THE REQUIREMENT OF THE SCHEME OF DELEGATION

School visit examples

- Visits to fulfil specific link role monitoring requirements. These may or may not include time in a classroom.
- Group visits to learn about particular aspects of the school and/or the curriculum. Again, these may include time in classrooms.
- Meetings with staff to discuss particular issues.
- Attending school assemblies.
- Attending parents' meetings and open evenings.
- Talking to students informally whenever opportunities arise.
- Attending staff meetings and INSET days.
- Helping with careers activities.
- Helping with learning support.
- Attending extra-curricular concerts, drama productions, exhibitions and sporting events.



What visits are not

They are not a form of formal inspection of the school or classroom in any way and are not to make judgements about the professional expertise of teachers or any other school staff. Trustees and Local Committees do not directly hold Principals or school staff to account. This is done by delegation to the CEO.

Nor are visits an opportunity for staff to bypass the normal channels of internal communication with executive staff.

Therefore, Trustees and Local Committee members should not:

- Make judgements about the quality of teaching.
- Check on the progress of their own children or others known to them.
- Pursue personal agendas.
- Monopolise teachers' or leaders' time.
- Arrive in the school or a classroom with inflexible, pre-conceived ideas.
- Become involved in matters that should be referred by the individual to their line manager.

Some other things to look out for while visiting a school

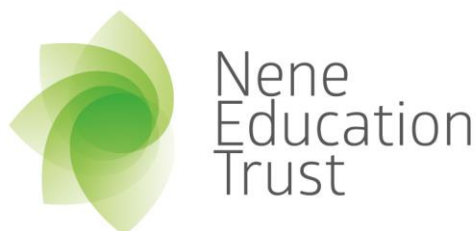
- Are there clear signs of welcome?
- Are examples of recent work on show?
- Are you encouraged to see all parts of the school?
- Is behaviour orderly at break times and when moving between classes?
- Are you encouraged to see examples of pupils' work and told about the progress of the class?
- Do all games and sports sessions include all the pupils in the class?
- Are all pupils encouraged to take part in music, drama and dance sessions?
- Are all pupils equally involved in all the activities, including those with special needs?
- How well do pupils get on together in class and around the school?
- What other impressions have you formed?

Preparing for a visit

- Clarify the purpose of the visit. What are the relevant parts of the School Development Plan that relate to my visit? What are the relevant Trust policies? What am I looking to understand as part of my role?
- Discuss the purpose of the visit and an agenda with the Principal well in advance. Make sure that the date chosen is suitable.
- Discuss with the Principal if any supporting information is available – Ofsted report, improvement plan, scheme of work.

Additional considerations for Trustees visiting schools

Whilst it is expected that Local Committee members will make regular visits to their schools and have a more detailed knowledge of their school and community in order to fulfil their roles as



per the Scheme of Delegation, it is expected that each Trustee will make at least an annual visit to a school in the Trust. These visits can be informal or formal. For example, key ways of enjoying informal visits would be through attending school performances and assemblies, special interest days and weeks such as an Art or Science Week, sports days and parent forums. Even on some occasions joining in the fun and acting as judges for various competitions.

Trustees may wish, occasionally, to accompany a senior member of staff on a formal learning walk to observe how the curriculum is offered and taught in each individual school.

Trustee visits can also be tailored to focus on priority areas identified by the Board and Committees to triangulate the reports and data being presented to Committee with what is happening on the ground. These can add an additional layer of intelligence and feedback for trustees, whilst recognising this area of responsibility sits with Trust executive staff and local committees through the SoD.

Procedure for Trustees visiting individual schools in the Trust

Arrange details of a visit in advance, with the CEO and/or Executive Assistant/Governance Manager to agree the focus of the visit who will in turn inform Principals of the rationale for any visits.

Requirements for all Trustees, Local Committee Members visiting schools

- Sign in at the school office and wear the Nene Education Trust ID badge, so that it can be seen clearly by pupils and staff.
- Note on arrival any Health and Safety procedures (ie fire evacuation) and Safeguarding requirements.
- Be accompanied around school by the Principal or senior member of staff who has organised the visit.
- Photographs of pupils are not permitted and do not use mobile phones.
- Acknowledge the teacher with a nod and a smile if entering a classroom and on leaving it.
- If speaking to a pupil tell them who you are and why you are there.
- Sign out on leaving.
- Complete the visit form.

Safeguarding and addressing concerns

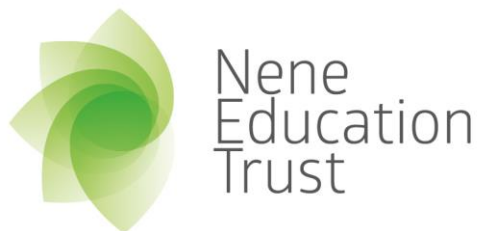
Keep the Safeguarding and Child Protection guidance in mind as this everyone's first priority when visiting a school.

If there is any aspect of the visit that is worrying, visitors should raise it with the Principal first. If not satisfied with the response, it should be shared with the Trust Safeguarding Lead or CEO as relevant.

APPENDICIES

Appendix 1 – Visit form

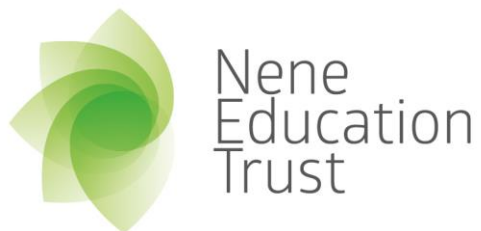
Appendix 2 – Training event form



**Member/Trustee/Local Committee Member General Visit Report Form
(Appendix 1)**

**ANY SAFEGUARDING CONCERNS MUST BE REPORTED TO THE SCHOOL DSL IN ACCORDANCE
WITH SCHOOL PROCEDURE BEFORE YOU LEAVE THE SCHOOL SITE**

| | |
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| Name | |
| Date and Time of Visit | |
| Purpose of visit | |
| Activities undertaken | |
| Observations | |



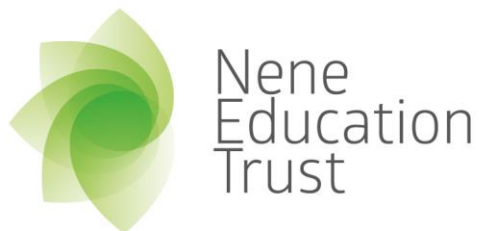
Issues arising for the Principal / CEO/ Trust Board to action

Follow up action

(record any action agreed by the Principal /CEO/Trust Board with regard to this visit)

Safeguarding: Any Observations regarding safeguarding (positive observations as opposed to concerns)

Send completed form to Executive Assistant/Governance Manager



**Member/Trustee/Local Committee Member Training Event Application
Form
(Appendix 2)**

| | |
|--|--|
| Name | |
| Date of event | |
| Title and purpose of event And link to CPD priority | |
| Cost if any | |
| Activities undertaken | |
| | |
| Learning points | |
| | |
| Send completed form to Executive Assistant/Governance Manager | |