



# Trustee and Governor Monitoring Visits

Approved: Summer 2025  
Date of Next Review: Summer 2027

## **Equality Impact Assessment - Policy Review**

**In reviewing this policy, we have tried to make a positive impact on equality by considering and reducing or removing inequalities and barriers which already existed. We have ensured that this policy does not impact negatively on the dimensions of equality.**

## Purpose and Responsibility of Governance

The purpose of Governance is to provide:

- **strategic leadership:** the board defines the trust vision for high quality and inclusive education in line with its charitable objects. It establishes and fosters the trust's culture and sets and champions the trust strategy
- **accountability and assurance:** the board has robust effective oversight of the operations and performance of the academy trust, including the provision of education, pupil welfare, overseeing and ensuring appropriate use of funding and effective financial performance and keeping their estate safe and well-maintained
- **engagement:** the board has strategic oversight of relationships with stakeholders. The board involves parents, schools and communities so that decision-making is supported by meaningful engagement.

## Purpose of School Visits

The primary purpose of school visits is to;

- support the schools and provide the Local Monitoring Committee and Trust Board with first-hand information;
- support understanding of how the schools operate;
- monitor the implementation of improvement plans and policies;
- build effective professional relationships with staff.

They also show the board's commitment to its responsibilities and contribute to the schools' self-evaluation and ongoing improvement. This policy applies to school visits made for the purpose of governance.

By visiting the schools and becoming better informed, Trustees and Governors will be:

- aware of the need, strengths and priorities of each school;
- better positioned to support and challenge leaders;
- strengthening relationships between staff, and their wider community.

## Expectations for Visits

While there are no set minimum requirements for Trustees to carry out monitoring visits. Trustees are free to determine how they maintain an up-to-date understanding of the Schools, which may include a range of approaches such as attending school events, meeting with leaders, participating in learning walks, or joining the Trust Improvement visits.

**Local Monitoring Committees** are responsible for monitoring the quality of education within their designated schools and are expected to carry out **at least three formal monitoring visits per year**. Governors are, however, encouraged to engage more frequently where possible, as a deeper understanding of the school context is essential for effective governance. Governors are encouraged to be flexible in their approach and to collaborate with each other and Executive Headteacher / Headteachers to identify the most meaningful opportunities to see the school in action and support ongoing school improvement.

Trustee and Governor visits to classrooms are not a form of inspection. Trustees and Governors may observe learning but must not judge the quality of teaching or staff expertise; such evaluations are the responsibility of the Chief Executive Officer, Headteachers, Leadership Team and Teaching Team Leaders. Trustees and Governors must not check on the progress of their own, or known children, monopolise staff time, or pursue personal agendas or issues.

## **Process for Visits**

Visits must be arranged in advance with the Executive Headteacher / Headteachers or through the Governance Professional to ensure they are purposeful and minimally disruptive. There is no specified length for a visit. The focus of each visit should be agreed in advance and linked to the School or Trust Improvement priorities. During visits, Trustees and Governors act on behalf of the Board or Committee in a strategic, not operational, capacity. Any concerns should be promptly referred to the Headteacher, and feedback should remain with the agreed remit unless there are safeguarding or Health and Safeguarding concerns.

Please ensure that all correspondence is copied to the Governance Professional to enable the visit to be recorded appropriately. Please ensure you arrange a mutually convenient time to meet with staff. If your visit includes any form of learning walk around the school, it is essential that you are accompanied by a member of staff.

In preparing for your visit, Trustees and Governors will use the Visit Preparation template below (annex 1.), making notes of areas of focus and questions for staff and students where relevant. These focus areas should be taken from the School Improvement Plan (SIP) for the school in question for Governor visits, with regard given to the MAT Improvement Plan for trustee visits. The staff member should provide you with background information and context on your chosen priority, show the initiative in action, and if possible, provide the opportunity for you to speak to students or other staff members who are affected by it.

New Trustees will visit each school in the Trust during the first year of their term of office as part of their induction process. New Governors are expected to visit each school within their committee's remit, in line with normal visit expectations.

Confidentiality and professionalism, in line with the Trustees' and Governors' Code of Practice, should be adhered to at all times during a visit. Following visits, each Trustee and Governor should, provide a summary to the Executive Headteacher / Headteachers, and submit a written report (annex 1.) to the Governance Professional for appropriate dissemination. The Headteacher will provide feedback to the individual staff members. The report will be forwarded to all Trustees and Governors with the agenda for the next Board or Committee meeting and you will be required at that meeting to report a summary of your findings. Trustees, Governors and staff must respect confidentiality arising from any aspect of the visit.

## **General Procedures**

All Trustees and Governors must receive clearance from the 'Disclosure and Barring Service' before they can begin any visits in school, report to each school's main office to sign in and must wear either their ID badge or a visitor's badge whilst on school premises. Anyone on site who is not wearing the appropriate ID may be challenged by staff or students. All Trustees and Governors must be made aware of emergency procedures by the member of staff supervising their visit.

## The Roseland Multi Academy Trust

### Monitoring Visit Report

<b>Trustee / Governor name:</b>	<b>Staff Name:</b>
<b>School visited:</b>	<b>Date &amp; time:</b>

<b>Focus of visit linked to the School Improvement Plan:</b>
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<b>Visit observations and discussions</b>
<b>Summary</b>
<b>Further action/comments for future visits</b>

<b>Trustee/Governor signature:</b>	<b>Staff signature:</b>
<b>Date:</b>	<b>Date:</b>

### Key questions for consideration:

Do you feel that **safeguarding** arrangements were sufficient during your visit?

Any points of note regarding the **learning environment**?

How is the school supporting **disadvantaged** students?

How is your area of focus supporting **ambitious expectations for what all children can achieve**?

How do we ensure we remain ambitious enough for all students?

What more can we do to meet the needs of any particular groups?

To what extent is **professional development and the performance management process** helping the school to progress? What improvements could be made to provision/processes?

How is your area of focus helping to **promote equality, tackle bullying and discrimination, and narrow achievement gaps between groups of children**? Are there any groups which require particular attention?

How is your area of focus helping the school to **promote British values**? What else could we do?

How is your area of focus helping to **safeguard and protect children, including from radicalisation and extremism**? What else could we do?