

Introduction

Trustees through the local Governing boards have three core functions:

- Ensuring clarity of vision, ethos and strategic direction;
- Holding the headteacher 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.

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.

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.

Purpose

All school visits will:

- Have a clear focus, linked to strategic priorities
- Be arranged with adequate notice through the headteacher and agreed with the relevant members of staff
- Be of value to the trustees and/or governing board which is demonstrable to outside agencies e.g. Ofsted or the LA

It is not the role of those governing to form judgements about the performance of school staff during visits and individuals will make every effort to avoid this impression.

Conduct

Those governing will comply with HCAT's codes of conduct and the standards of presentation expected of staff. They will be mindful that they are representing the trustees and the whole governing board through their words and actions.

Follow-up

Those governing will have the opportunity to discuss the visit, including any concerns, with the headteacher immediately or soon after the visit.

The attached 'Governor Visit Report' will be completed after each visit. A draft will be shared with the headteacher and any other members of staff involved in the visit and, when agreed, a final version will be included in the papers for discussion in the next local governing board meeting or trustee committee.

Confidentiality

Confidentiality should be adhered to regarding visits. Comments should be limited to the headteacher or senior or middle leader with who the visit was arranged but not with other staff or with parents. Individual children or staff members (other than the member of staff involved with the visit) should not be identified in school visit reports.

HCAT Trustee / Governor record of visit and visit protocol

Name:	Date:
Focus of visit (link to school development plan)	
Summary of activities e.g. talking to staff and pupils, looking at specific resources, having lunch etc.	
What have I learned as a result of my visit? (relate this back to focus of visit)	
Aspects I would like clarified/questions that I have:	
Actions or points for the governing board to consider:	

HCAT Trustee / Governor record of visit and visit protocol

Some Do's and Don'ts – Taken from NGA guidance

The table below provides a guide to what those governing should and shouldn't do before, during, and after a school visit.

	Do	Don't
Before	<ul style="list-style-type: none"> ✓ Discuss the visit at a governing board meeting, including identifying a clear purpose. (It can be useful to think of the governing board as 'commissioning' the visit and delegating responsibility for carrying it out to individual governor(s).) ✓ Arrange a mutually convenient time, avoiding sensitive times such as exam or assessment periods. ✓ Discuss the visit with the headteacher and ensure that any member of staff who will be involved in the visit understands the 	<ul style="list-style-type: none"> × Turn up unannounced. × Approach staff directly without the approval of the headteacher
During	<ul style="list-style-type: none"> ✓ Present yourself in a way which matches the professionalism expected of school staff. ✓ Report to reception and follow procedures for visitors – even those familiar with the school should do this. ✓ Only enter classrooms and other areas of the school – including the staffroom – following invitation by a member of staff. ✓ Keep to the role agreed; only talk to students if invited to do so by the teacher ✓ Be flexible if something urgent crops up which means the arranged tasks cannot take place – always keep in mind that the education of the students is of overriding importance. ✓ Be courteous and professional throughout the visit, including thanking members of staff before leaving. 	<ul style="list-style-type: none"> × Don't turn up in shorts, immodest shirt, flip flops × Give the impression that you are inspecting, for example by using a clipboard or making notes while visiting a classroom. × Assume a different role to that agreed; parents and education professionals, in particular, should be mindful not to stray into these roles. × Express personal opinions if pressed on a controversial issue – individuals should keep in mind that they are representing the governing board as a whole. × Make assumptions – always ask for explanations of anything not understood at an appropriate time when it will not interrupt pupils' learning (this may be in conversation with the class teacher after the lesson or with the headteacher at the end of the visit). × Check on the progress of individual children, including your own. × Walk around the school unaccompanied or put yourself in situations where you are likely to
After	<ul style="list-style-type: none"> ✓ Share any concerns, however trivial, with the chair and the headteacher. ✓ Complete a short visit report using the HCAT governor/trustee visit form. The draft should be shared with any relevant members of staff and the headteacher, then taking their comments into account a final written report should be prepared and given to the governing board/ trustees before the next meeting. ✓ Ensure that school visits is an agenda item at the governing board meeting and that any findings are discussed ✓ Send a thank you email to those that 	<ul style="list-style-type: none"> × Make comments regarding the teacher's conduct of the lesson or individual students. × Refer to individual teachers or students in your report, even in a positive light. × Gossip about your visit – what you have seen should be treated with the same level of confidentiality as any other governing board business.