
Academy Visits

(Guidance and Protocol for Local Academy members)

Updates**Date:**

Page 3 Removal of Signature box

March 2019

Rebrand Trust name change

September 2019

Local Governing Body (LGB) changed to Local Academy Board (LAB)

September 2021

Title changed to Academy Visits (Guidance and Protocol for Local Academy Board members)

Annex 2 visit report form updated

Note: Where the policy references Local Academy Board, this also includes Strategic Task Groups where these form the main governance structure at the academy.

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Statement of intent

At the Diocese of Hereford Multi-Academy Trust ('Trust'), we recognise and value the effort taken by members of the Local Academy Board (LAB) who contribute towards our academy. We encourage your assistance and acknowledge that many academy activities and processes would be at risk if it were not for your help. As a result, we want to make sure that your time spent as part of the Local Academy Board is productive and enjoyable.

This policy outlines what is expected from members of the LAB when visiting an academy, which all are required to comply with.

"Governance Handbook October 2020"

"Due to coronavirus, if governors or academy trustees wish to visit a school, they should speak with the school leader and work out a pragmatic solution that takes into consideration the school's risk assessment, and how the health and safety of any visitors, alongside staff and pupils, will be protected"

Visits to academies – the role of the LAB member

1.0 Introduction

- 1.1 Visits to the academy can be enormously useful in helping them carry out their role. That role is largely strategic, not operational, and includes ensuring vision is being turned into reality, ethos is being embedded and progress is being made against the strategic plan. At the heart of this is one of NGA's '**Eight elements of effective governance**': knowing the academy – the data, the staff, the parents, the children and the community.
- 1.2 There are numerous ways you can know your academy; for example, through analysing pupil data, receiving feedback from the Headteacher, and seeking the views of parents, staff, and pupils. However, actually visiting the academy in person provides a valuable insight into how the academy operates as well as an opportunity to put other information in context. A well-planned programme of visits are an important element of the LAB strategic role.
- 1.3 Even those who are familiar with the academy as staff or parents will find visits important for developing their knowledge of the academy from a governance perspective. It also has less obvious benefits, such as helping to build positive relationships with staff and demonstrating commitment to the academy.
- 1.4 The Department for Education's (DfE's) Governance Handbook (October 2020) states that:

“Many boards find that visiting their school particularly during the day, is a helpful way to find out more about the school, its staff and students. Through pre-arranged visits that have a clear focus, the board can see for themselves whether the schools are implementing their policies and improvement plans and how they are working in practice.”

2.0 Setting expectations for Visits

- 2.1 Every visit should have a clear, prearranged focus. This is important because it helps everyone to use their time productively. The focus of the visit will generally relate to the LAB's monitoring of the academy strategy or to developing a rounded understanding of the academy's strengths and weaknesses.
- 2.2 In most cases, the visit should link to objectives and targets set out in the vision and strategy formulated by the LAB (see [A Framework for Governance](#) for more on formulating and monitoring the strategy).

- 2.3 Visits should involve the member of staff responsible for the objective or target meeting with the member of the LAB in order to provide background information and context, showing the initiative in action, and if possible providing the opportunity for them to speak to children or staff members who are affected by it. Examples of what a visit could focus on include:
- 2.3.1 *The use of resources, such as how the premises are utilised, a new teaching resource in action or a demonstration of an IT system).*
 - 2.3.2 *Monitoring the implementation of a particular policy for example safeguarding, homework, lesson planning.*
 - 2.3.3 *Monitoring progress towards specific targets from the School Development Plan; for example, meeting with the subject lead of an area for improvement and learning about the strategy adopted and how this translates through to classroom practice and children's learning.*
 - 2.3.4 *Gaining an understanding of a particular curriculum area or year group.*
 - 2.3.5 *Gaining an understanding of the process of assessment and tracking pupil cohorts.*
 - 2.3.6 *Gaining an understanding of how a particular issue (e.g. provision of ICT, boys' achievement, literacy) is dealt with on a day-to-day basis*
- 2.4 During any visit to the academy, it is important to remember that **the role of LAB member is strategic, not operational**. Visits by members of the LAB should not be confused with inspections. For example, if the focus of the visit is regarding the Health and Safety policy, acceptable activities would be to seek an understanding of;
- 2.4.1 *How the policy is managed, how staff are made aware of the policy, about any issues and how they have been dealt with, what lessons have been learned when things go wrong,*
 - 2.4.2 *How health and safety is audited and how the findings are acted upon. It is **not** within the remit of the LAB for individual LAB member to tour the academy carrying out health and safety checks. Even if you have this expertise through your job, this should be left to professionals contracted by the academy for that purpose.*

2.3 The itinerary will follow-on from the focus: for most, a meeting with the relevant member(s) of staff will be involved; for some, spending time in a classroom talking to the children about their work, or the resources they use, may be an appropriate part of the visit. Sometimes, a focus group of children or staff would be useful; for example, if you were exploring attitudes to an attendance policy

2.4 Most of the time, academy visits will have a key focus on the LAB's monitoring role, but there are some occasions where this would not necessarily always be the case. For example, a new member of the LAB may 'tour' the academy as part of their induction, or LAB members, may attend a parents' evening as a means of engaging with parents. If the academy has parent or pupil councils, it can be useful for members of the LAB to meet with these groups, or sit in on meetings. For more on engagement with parents, see *Knowing your School; getting to know your parents* guidance which can be found on the [NGA](#) website

3.0 A common pitfall: "I'm here to observe a lesson"

3.1 It can be easy to fall into the trap of referring to an academy visit as a chance to "observe" teaching and learning – but by doing so you could be causing unnecessary confusion and stress. "Lesson observation" has a specific meaning in an academy context: it is an activity undertaken by academy leaders in order to collect evidence about teachers' performance, for the purposes of appraisal and general standards. This is, of course, a professional task and should be carried out by the Headteacher, or appropriate line managers.

3.2 Most members of the LAB or Trust Board do not have the expertise to do this, and, even if they do, it is not within their remit. It is important for LAB Members to avoid giving the impression that they are there to judge or inspect teachers' performance. As the [Governance Handbook](#) states:

"Governors are not inspectors, and it is not their role to assess the quality or method of teaching or extent of learning".

While Ofsted's inspection handbook makes no explicit reference to governors, Directors or governing committee members visiting their academies, inspectors will be looking for evidence of how well LABs know their academy, and learning from visits can form an important part of this. Confusion around this has sometimes been compounded by some Ofsted inspectors.

3.3 We are aware that LAB members are sometimes asked whether they visit lessons to understand the quality of teaching, and comments that appear to praise this practice can make their way into reports.

- 3.4 When speaking to inspectors, LAB members should be confident about what they are doing in visiting the academy – and confident in why they are not engaging in operational activities. The key message is that when visiting the academy, a protocol and a clear focus should be in place that is understood and agreed by all involved. A model protocol is available in Annex 1.
- 3.5 There may also be visits to the academy for less formal occasions, such as plays or celebration events. LABs may choose not to count these as formal visits but should nevertheless follow this policy as appropriate.

4.0 How often should I visit?

- 4.1 There is no need for those governing to be in an academy every week – as the [Governance Handbook](#) states, those visiting “should make sure they do not interfere in the day-to-day running of the academy”. It can therefore be useful for the LABs to set a minimum and maximum number of visits that individuals should make each academy year. This not only keeps visits to a sustainable and pragmatic level, but will also ensure that those visits are spread out over the academic year.
- 4.2 It is also worth remembering that demanding a high number of daytime visits might even act as a barrier to recruiting or retaining good LAB members. Full time work or family care commitments may mean it is difficult for visits during the day. Visits should therefore not be frequent and should be as focused as possible.
- 4.3 In Multi Academy Trusts (MATs), even where LABs are in place, it is still important for each academy within the Trust to receive at least one annual visit from a Director. As well as providing the Trust greater visibility within its academies, visits will also give Directors valuable insight in to the implementation of the Trust wide vision and strategy and provide assurances governance arrangements are effective. As it may not be sustainable in medium to large MAT’s for each academy to receive termly visits from a Director, The Trust should consider the best approach to academy visits in order to best utilise Directors limited time. Visits do need to be a whole day, but should be well planned to allow for a productive visit.
- 4.4 Individuals may also spend time in the academy in a non-governance capacity. Parent LAB members, Directors or LAB members will visit the academy in relation to their child’s education, staff governors for their jobs, and other LAB members may volunteer in the academy in other ways (such as listening to children read). It is important to keep these roles separate from that of governing, and to be clear about when you are visiting in a governance capacity.

5.0 What should I do on a visit?

- 5.1 LAB members and Directors do **not** have the right to visit the academy unannounced, and it is vital to plan academy visits in advance, especially if they involve visiting classrooms. Visits should be part of a planned programme agreed by the whole LAB and Headteacher, and linking to the academy strategy.
- 5.2 Having a clear protocol in place that is understood by all ensures a disproportionate amount of time is not spent planning each visit.
- 5.3 Each member of staff who will be involved in the visit should also know the purpose of the visit and what to expect. This should be coordinated directly through the Headteacher, who will confirm details of the visit with the staff member themselves.
- 5.4 As well as the more obvious questions of where, who, and what, those governing should establish, the finer details of how they will be expected to conduct themselves in order to ensure that everyone is comfortable and confident about the visit. They should also be familiar with the LAB members Code of Conduct and this Visitors Policy and Procedures and may wish to ask specific questions such as:
 - 5.4.1 *Where should I go on arrival at the academy?*
 - 5.4.2 *Who will meet me and introduce me to the relevant staff member?*
 - 5.4.3 *How would you like me to be introduced to pupils i.e. by first name or Ms/Mr X?*
 - 5.4.4 *How should I address staff i.e. by first name or Ms/Mr X?*
 - 5.4.5 *What should I do if a pupil asks for help?*
 - 5.4.6 *What should I do if I see a pupil behaving inappropriately?*
- 5.5 Are visits to classrooms needed?
 - 5.5.1 This guidance is primarily based on visits where the visitor is 'hosted' by a senior or middle leader, perhaps to discuss directly with them a specific area or academy responsibility, or to see how agreed improvement plans are being implemented. However, where agreed, a visit to a classroom may still be in order, **not** to observe lessons, but as a means of assisting the visitor, whether a LAB member or Director to get to know their academy in the broader sense.

- 5.5.2 Examples could include getting to know the academy's Behaviour Policy in action, or a visit specifically focused on the strategic priorities around the developments of Premises and Resources e.g. establishing that all the pupils can actually fit into the classroom and are adequately resourced.

5.6 Reviewing academy visits

5.6.1 After each visit to the academy, individuals should take time to reflect and consider anything they might do differently in future visits. In addition, the LAB should review their academy visits protocol every academic year.

The review should consider:

5.6.2 Are our visits proving useful?

5.6.3 What benefits, particularly unexpected benefits, have come from our visits?

5.6.4 Are we better informed and enabled to make sensible decisions?

5.6.5 Is there anything we need to change about how visits are conducted, taking into account feedback from the staff?

5.6.6 What should I do if I have concerns about staff?

Do's and Don'ts: the table below provides a guide to what those governing should and should not do before, during, and after an academy visit.

	Do	Don't
Before	<ul style="list-style-type: none"> ✓ Discuss the visit at a LAB meeting, including identifying a clear purpose. (It can be useful to think of the LAB as 'commissioning' the visit and delegating responsibility for carrying it out to individual LAB members) ✓ Arrange a mutually convenient time, avoiding sensitive times such as exam or assessment periods. 	<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 academy staff. ✓ Report to reception and follow procedures for visitors – even those familiar with the academy should do this. ✓ Only enter classrooms and other areas of the academy – 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, for example. ✗ 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 LGB as a whole; do not get pulled into conversations in which individual staff wish to develop grievances or canvas support. ✗ 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).

After	<ul style="list-style-type: none"> ✓ Share any concerns, however trivial, with the Chair and the Headteacher. ✓ Complete a short visit report using a form like the one in Annex 2; a 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 provided to the LAB before the next meeting. ✓ Ensure that academy visits are an agenda item at the next LAB and that any findings are discussed ✓ Send a thank you email to those that contributed to the success of the visit. 	<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 LAB business.
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7.0 ANNEX 1: Model Visit Protocol

Introduction:

LABs have three core functions:

- 7.1 Ensuring clarity of vision, ethos and strategic direction;
- 7.2 Holding the Headteacher to account for the educational performance of the academy and its pupils, and the performance management of the staff; and
- 7.3 Overseeing the financial performance of the academy and making sure its money is well spent supporting the strategy and SDP.
- 7.4 LAB members draw upon a range of evidence in order to carry out these functions and one source of information is their own visits to their academy.
- 7.5 This protocol applies to academy visits made for the purpose of governance, and not to visits to the academy site that an individual may make in other capacities e.g. as parents or members of staff.

Purpose:

All academy visits will:

- 7.6 Have a clear focus, linked to strategic priorities, which is agreed by the full LAB.
- 7.7 Be arranged with adequate notice through the Headteacher and agreed with the relevant members of staff
- 7.8 Be of value to the LAB which is demonstrable to outside agencies e.g. Ofsted and the Trust.
- 7.9 It is not the role of those governing to form judgements about the performance of academy staff during visits and individuals will make every effort to avoid this impression.

Conduct:

- 7.10 Those governing will comply with the academy and LAB members Codes of Conduct and the standards of presentation expected of staff. They will be mindful that they are representing the whole LAB and Trust through their words and actions.

Follow-up

- 7.11 Those governing will have the opportunity to discuss the visit, including any concerns, with the Headteacher immediately, or soon after the visit.
- 7.12 The attached 'Visit Report' (Annex 2) 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 LAB meeting (this may be the full LAB, committee, for the Trust Board) as appropriate.

Confidentiality:

- 7.13 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 academy visit report.

Frequency:

- 7.14 LAB member and Directors will undertake a minimum of one visit to the academy per academic year, but no more than once a term, unless as part of a pre-agreed monitoring cycle.

Review:

The Trust will review the Visitors Policy every 3 years, unless there are any legislative changes.

8 ANNEX 2: Model Visit Report

Name:	Date:
Focus of visit (link to strategy and academy 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 for the governing board to consider:	
Any other comments/ideas for future visits:	
Signed: _____ (LAB/STG member)	