

# Trustee/Governor Visits Policy

## Version 5

<b>Status:</b>	Statutory
<b>Responsible Board/Committee/Individual:</b>	Trust Board
<b>Author:</b>	CEO
<b>Target Audience:</b>	All Stakeholders
<b>Date Policy Agreed</b>	February 2020 (Version 1) December 2022 (Version 2) December 2023 (Version 3) July 2024 (Version 4) July 2025 (Version 5)
<b>Review Date:</b>	July 2026

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## **TRUSTEE/GOVERNOR VISITS POLICY**

### **RATIONALE**

The Brighter Futures Learning Partnership Trust (the Trust) believes that an important aspect within the relationship of Governors and the school should be that of 'critical friend'. It follows, therefore, that liaison visits into school should be based on mutual trust and understanding, should be conducted in an objective and professional atmosphere. Such work will inform Trustees/Governors, be supportive to staff and move events forward for the benefit of all, in particular, the pupils/students.

(Appendix 1, Benefits of Trustee/Governor Visits)

It is important that Trustees, Governors and staff remember that the purpose of these visits is not to assess the quality of teaching provision, nor to pursue issues that relate to the day to day management of the school, other than as agreed with the CEO, Headteacher or members of the Leadership Group.

The term 'visit' for this policy includes:

- a meeting with an individual member of staff or group of staff
- an opportunity to see teachers and pupils/students at work in a lesson

Visits will always have an agreed focus which could be:

- linked to a priority or activity within the school development plan
- part of a Trustee/Governor link responsibility e.g. Health and Safety, School Council, SEND Disadvantaged students
- getting to know the school, particularly for a new Trustee/Governor as part of induction

### **AIMS**

- to observe and learn so that Trustees/Governors can better understand and support the school
- to help build good working relationships between Trustees, Governors, staff, parents and pupils/students with an emphasis on mutual respect
- to familiarise themselves with day to day practices and the ethos of the school
- to support and encourage the staff
- to help them fulfil their legal obligations as "critical friends"

### **GUIDELINES**

#### **Before the visit**

- the purpose of the visit should be agreed and approved by the CEO (for Trustees) or the Headteacher (for Governors) in the first instance
- the visits should be co-ordinated by the PA to the CEO or Headteacher and a log of visits shared with the CEO, Board, Headteacher and the Local Governing Board
- the Trustee/Governor will liaise with the relevant member of the leadership team in order to develop a programme (focus, role and timetable)

- the Headteacher will clarify procedures for the visit such as signing in, fire drills and confidentiality issues
- the relevant member of the Leadership Team will liaise with the Head of Department, if the visit is to a subject area

### **During the visit**

The Trustee/Governor will:

- be met and accompanied by the appropriate senior/middle leader/member of staff and introduced to relevant staff
- keep to the agreed remit and, if in lessons, not make any comments on the teaching, the standard of work or class behaviour
- talk to the pupils/students and teacher about the work/visit if appropriate (Appendix 2 for prompts). Please remember teachers are working to timetable and may not have time for an in-depth discussion
- take an interest in the environment, including display

### **After the visit**

The Trustee/Governor will:

- produce a formal record on the standard proforma (Appendix 3)
- ensure a copy is distributed to the Headteacher, who will then distribute it to the Chair of Governors and the CEO. The Headteacher will ensure all relevant parties receive a copy of the visit notes
- report any issues/concerns as soon as possible to the Headteacher

### **Monitoring and evaluation**

The appropriate Committee will review the visits report back to the Local Governing Board and Trust Board. The review will consider:

- are we doing what we set out to do?
- are our visits achieving the potential benefits identified in the policy?
- have I learned more about the school?
- are we better informed to support decision making?
- do the staff feel supported and valued?
- have I helped the Trust Board/Local Governing Board fulfil its duties?
- have there been any unexpected benefits?
- how can we make the policy and practice even better?
- the impact of the school's development plan on learning and pupil/student progress
- could I articulate to an Ofsted Inspector how the visits are helping the leadership team and staff to achieve the school's objectives?

**Trustee /Governor Visit Policy Version 5 – Agreed by Trust Board – July 2025**

**WHAT ARE THE BENEFITS OF TRUSTEE/GOVERNORS VISITS?**

<b>For Trustees/Governors</b>	<b>For Staff</b>
To establish and develop effective relationships with the staff	To get to know and build positive relationships with Trustees/Governors
To have a greater understanding of pupils'/students' needs	
To recognise and celebrate success	To feel valued
To monitor the implementation of the school development plan	To appreciate and value the role and responsibilities of all Trustees/Governors
To increase first-hand knowledge of the school which will inform strategic decisions	
To understand the environment in which staff work and teachers teach	To ensure Trustees/Governors understand the reality of the classroom and the school
To see policies and schemes of work in practice	
To find out what resources are used, what resources are needed and prioritise them	To highlight the need for further resources (but not lobby Trustees/Governors directly)
To show support and encouragement to staff and pupils/students	
To demonstrate that the Trust/Local Governing Board is contributing to the school's self-evaluation process	
To develop individual Trustees'/Governors' roles in terms of their specific responsibilities e.g. Health and Safety, School Council, SEND	To share an understanding of the specific area
To monitor that all staff understand their accountability and that children's welfare and progress is at the heart of all Trust provision	
To increase understanding of evidence-based practice	

**POSSIBLE QUESTIONS****You may like to ask pupils/students something like:**

- please explain what you are learning
- what do you enjoy about this subject?
- what have you done in this subject which you are proud of?
- how do you know when you have done a good piece of work?
- how do you know how well you are doing?
- what would help you to learn more?

**You may ask the teacher:**

- what is it you enjoy about teaching?
- have you got any special work from the pupils/students you would like me to see?
- what will you be doing next with the pupils/students?

**and**

- any questions relating to the agreed focus
- how are you managing to develop the new curriculum?
- what are the challenges/
- how are you using evidence-based practice in your teaching to support learning?

**BRIGHTER FUTURES LEARNING PARTNERSHIP TRUST  
TRUSTEE/GOVERNOR VISITS 2025-2026**

**School Visited:**

**Date:**

**Activity:** *tick any that apply*

- Discussion with School Leader(s)
- Walk round school and classrooms
- Discussions with pupils – formal
- Discussions with pupils – during walk round
- Discussions with other staff
- Observation of event – assembly/performance/rehearsal
- Look at pupils' work
- Look at any other documentation/records
- Discussion with LGB member(s)
- Discussion with any Trust advisers on site
- Other *(please specify)*

**Comments relating to the impact or effectiveness of the Trust:**

***(Please feel free to delete any that are not relevant to your visit, and make any brief comments under any that are)***

- Leadership support – may include Director of School Improvement Maria Rock/central team: finance, IT, site management or HR/Helen or Garath's visits in support of issues/training/Headteacher board meetings/support with Ofsted preparation and process
- Curriculum/delivery support – may include subject director involvement (maths/mathematics SATs tutor Shirley Olijnyk/ reading Hannah D' Rozario)/ Sarah Brewster Phonics/PKC impact/subject networks/sharing the development of resources with other schools in the Trust
- Evidence of impact of consultant visits – for example a focus on pupil premium, or subject delivery

- Evidence of impact on pupil well-being, personal development or behaviour – may include observations of pupils' demeanour/report on how Character First is working/support with attendance/SEND/support from Lara Allison Trust Education Welfare officer
- Evidence of impact on staff well-being – may be feedback relating to work load/professional optimism. Specific interest in how the Trust policy for aggression against staff is being used by the school/LGB
- Any other comments

#### **Follow Up**

**Name of Trustee:**

**Date:**



Governor Health and Safety Visit 2025-2026	
Site Visited:	
Completed By:	
Date and Time of Visit:	
Visit Completed With:	
Please complete the sections below during your visit. If you are unable to complete a section, please make a note in the comments section. If you answer 'no' in any section, please make sure you raise this with the Headteacher/Principal immediately and ensure this is actioned within an appropriate timeframe, following the actions up in your board meeting or your next visit.	
Please ensure a copy of this is forwarded to the Executive PA and the Estates Manager at the email addresses below:	
<b>Headteacher</b>	xxxxxxx
<b>Executive PA</b>	<a href="mailto:executivepa@brighterfutureslpt.com">executivepa@brighterfutureslpt.com</a>
<b>Estates Manager</b>	<a href="mailto:cropper.l@brighterfutureslpt.com">cropper.l@brighterfutureslpt.com</a>

Grounds	
Is Signage Present and Clear?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Is Site Free from Litter?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Are The Grass, Bushes, Planting and Trees Presentable with No Obvious Hazards	Yes <input type="checkbox"/> No <input type="checkbox"/>
Are Tarmac, Concrete and Pathways in an Acceptable Condition, Free from Cracks, Holes and Obvious trip Hazards?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Are Steps and High Edges Highlighted in Yellow (when/where applicable)	Yes <input type="checkbox"/> No <input type="checkbox"/>
Are Fencing and Gates Secure and Do they Operate Correctly?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Are Bins Secure and Is the Waste Area Tidy?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Any There Any Signs of Pest Activity,	Yes <input type="checkbox"/> No <input type="checkbox"/>
Is Play Equipment in Good Working Order and Is the Flooring Around Equipment Safe?	Yes <input type="checkbox"/> No <input type="checkbox"/>
<b>Comments:</b>	

Building And Health and Safety	
Is The Flooring Secure with No Threads, Loose Tiles, Cracks or Splits to Vinyl?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Is Door Furniture Secure and Functional? (Threshold Strips, Kickplates, Handles etc.)	Yes <input type="checkbox"/> No <input type="checkbox"/>
Do Doors Function Correctly and Have Fingerguards in Good Condition?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Are Walls Free from Cracks and Is Paintwork in Good Condition?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Are Ceiling Tiles/Grids in Good Order with No Missing Tiles or Broken Tiles?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Are There Any Broken Windows or Blown (Condensed) Panels?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Are There Any drips on Pipework or from taps?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Is There Any Signs of Pest Activity Especially in the Kitchen	Yes <input type="checkbox"/> No <input type="checkbox"/>
Is Lighting Functional Inside and Out? (Any Defective Units or Blown Bulbs)	Yes <input type="checkbox"/> No <input type="checkbox"/>
Does Toilet Furniture Operate Correctly? Do Taps, Flush Handles, Door Locks and Dispensers all Work Correctly?	Yes <input type="checkbox"/> No <input type="checkbox"/>
<b>Comments:</b>	

Storage/Plant Rooms	
Are Shelves Loaded Correctly (Heavy Items at The Bottom, Light at The Top)	Yes <input type="checkbox"/> No <input type="checkbox"/>
Are Walkways Clear with Minimal Items on The Floor?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Are Items Securely Stored on Each Shelf?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Is Clear Space Available Around Electrical Boards – (If Present)	Yes <input type="checkbox"/> No <input type="checkbox"/>
Any Non-Functional Equipment/Error Lights?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Any Items Stored Next to Boilers/Plant Equipment?	Yes <input type="checkbox"/> No <input type="checkbox"/>
<b>Comments:</b>	

Cleanliness and Cleaning	
Is Flooring Clean and are Edges Free from Dirt Buildup?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Are Walls and Furniture Clean and Free from Marks?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Are Windows and Windowsills Clean and Free from Debris?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Are High Level Surfaces Free from Dust and Cobwebs – Check Tops of Furniture and Corners of Rooms	Yes <input type="checkbox"/> No <input type="checkbox"/>
Do Toilets Smell Fresh and is Sanitaryware Clean?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Are Kitchenette Areas Clean and Tidy?	Yes <input type="checkbox"/> No <input type="checkbox"/>
<b>Comments:</b>	

Fire	
Are Fire Evacuation Routes Clear and Free from Obstructions?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Do Call Points Have Fire Action Notices, With Details Completed?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Is Escape Route and Evacuation Point Information Available Throughout the Building?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Weekly - Call Point Check Completed and Documented - Trust Folder (Red)	Yes <input type="checkbox"/> No <input type="checkbox"/>
Monthly - Fire Fighting Equipment Check Completed and Documented - Trust Folder (Red)	Yes <input type="checkbox"/> No <input type="checkbox"/>
Monthly - Fire Door Check Completed and Documented - Trust Folder (Red)	Yes <input type="checkbox"/> No <input type="checkbox"/>
Monthly - Emergency Lighting Check Completed and Documented - Trust Folder (Red)	Yes <input type="checkbox"/> No <input type="checkbox"/>
Termly- Fire Evacuation Log Completed and Documented - Trust Folder (Red)	Yes <input type="checkbox"/> No <input type="checkbox"/>
Is A Copy of the Fire Risk Assessment Available?	Yes <input type="checkbox"/> No <input type="checkbox"/>
<b>Comments:</b>	

Water -Legionella	
Weekly - Legionella Flushing Completed and Documented - Trust Folder (Blue)	Yes <input type="checkbox"/> No <input type="checkbox"/>

Monthly - Legionella Temperature Profiles Check Completed and Documented - Trust Folder (Blue)	Yes <input type="checkbox"/> No <input type="checkbox"/>
Is A Copy of the Legionella Risk Assessment Available?	Yes <input type="checkbox"/> No <input type="checkbox"/>
<b>Comments:</b>	

<b>Compliance – Completed by External Contractor</b>	
Annual - Gas Safety Checks - Trust Folder (Black)	Yes <input type="checkbox"/> No <input type="checkbox"/>
Annual - Portable Appliance Testing - Trust Folder (Black)	Yes <input type="checkbox"/> No <input type="checkbox"/>
6 Monthly/Annual – Fire Alarm Servicing - Trust Folder (Red)	Yes <input type="checkbox"/> No <input type="checkbox"/>
Annual – Fire Fighting Equipment - Trust Folder (Red)	Yes <input type="checkbox"/> No <input type="checkbox"/>
Annual – Emergency Lighting Check- Trust Folder (Red)	Yes <input type="checkbox"/> No <input type="checkbox"/>
Annual Intruder Alarm - Trust Folder (Black)	Yes <input type="checkbox"/> No <input type="checkbox"/>
Annual Kitchen Extract - Trust Folder (Black)	Yes <input type="checkbox"/> No <input type="checkbox"/>
5 Yearly – Fixed Wire Test - Trust Folder (Black)	Yes <input type="checkbox"/> No <input type="checkbox"/>
<b>Comments:</b>	

<b>Any Other Comments/Information:</b>
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Signed:	
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Please return one copy to your Headteacher, one to the Trust Executive PA and one to the Estates Manager.

**Email addresses**

**Headteacher**

XXXXXXX

**Executive PA**

[executivepa@brighterfutureslpt.com](mailto:executivepa@brighterfutureslpt.com)

**Estates Manager**

[cropper.l@brighterfutureslpt.com](mailto:cropper.l@brighterfutureslpt.com)

Governor Safeguarding Visit School Compliance Checklist for Governors 2025-2026	
Site Visited:	
Completed By:	
Date and Time of Visit:	
Visit Completed With:	

Before the visit, there should be an agreed focus due to the scale of what might be reviewed. Headteachers should make staff available to discuss training logs, policy and practice. Good practice is for a governor to speak to a group of staff, which could be 30 mins after school to check out they know procedures or the Headteacher could design a questionnaire for all staff and share the outcomes (Mini recall exercise).

At least one visit should be focused on the Single Central Record but it is important to consider the process for overseeing Children in need, those under Social Care and CPOMs records, ensuring appropriate provision and actions are put in place to safeguard children.

Governors may undertake a panel visit on line where they have a set number of questions which they develop with the Headteacher/Principal to assure themselves that there is a strong safeguarding culture in the school.

If there are any concerns during a visit, these should be raised with the Headteacher and the Trust.

	Evidence of Compliance	Date	Action required: yes/no
Safeguarding: School Compliance Checklist			
The school is effectively implementing the Trust's safeguarding and child protection policy in place that agreed yearly by Trustees and updated accordingly.			Yes <input type="checkbox"/> No <input type="checkbox"/>
The school has child protection procedures in place that are in accordance with the Local Safeguarding Children Board (LSCB) or safeguarding partners. Staff to explain how this works.			Yes <input type="checkbox"/> No <input type="checkbox"/>
Staff know the content of the child protection, behaviour, staff behaviour (code of conduct) and any other safeguarding policies. Discuss with staff how each policy is shared with all staff and how they have assurance			Yes <input type="checkbox"/> No <input type="checkbox"/>

that they have read them (Check logs). Check that staff know signs of neglect and abuse and the procedures to follow if they have concerns or questions			
All staff have access to the most up-to-date version of Keeping Children Safe in Education (KCSIE) and have read at least part 1 of the document.			Yes <input type="checkbox"/> No <input type="checkbox"/>
All school staff have undertaken appropriate safeguarding and child protection training, which is regularly updated. Check that records of training undertaken by staff are kept.			Yes <input type="checkbox"/> No <input type="checkbox"/>
Temporary staff and volunteers who work with children are made aware of the school's arrangements for child protection and of their responsibilities in relation to this. Ask to see the register with evidence of this.			Yes <input type="checkbox"/> No <input type="checkbox"/>
All staff have attended Prevent duty training and refresher courses when necessary. This is recorded and the LGB are updated regularly.			Yes <input type="checkbox"/> No <input type="checkbox"/>
All governors and/or trustees have received appropriate safeguarding and child protection training that allows them to provide sufficient strategic challenge to schools. This training is regularly updated. Governors should check their own logs.			Yes <input type="checkbox"/> No <input type="checkbox"/>
All staff understand that child-on-child abuse can occur and are clear on the school's policy for this and who to escalate to.			Yes <input type="checkbox"/> No <input type="checkbox"/>
All staff (including temporary staff and volunteers working with children) know the procedure to follow if a child makes a disclosure of abuse, exploitation or neglect, including how to maintain			Yes <input type="checkbox"/> No <input type="checkbox"/>

confidentiality and reassure the pupil they are being taken seriously. Governors should ask some staff as they walk around lessons or speak to a staff panel.			
Designated staff should be aware of their local Early Help process and understand their role in it.			Yes <input type="checkbox"/> No <input type="checkbox"/>
All staff should be aware of the process for making referrals to children's social care and for statutory assessments under the Children Act 1989, especially section 17 (children in need) and section 47 (a child suffering, or likely to suffer, significant harm); they should be aware of what may follow a referral, along with the role they might be expected to play in such assessments.			Yes <input type="checkbox"/> No <input type="checkbox"/>
The school has a designated safeguarding lead (DSL) and this person is a member of the school's senior leadership team. They have the lead responsibility for safeguarding as outlined in Annex C of Keeping Children Safe in Education.			Yes <input type="checkbox"/> No <input type="checkbox"/>
The DSL and any deputies responsible for safeguarding have undertaken job-specific training and appropriate refresher training at two-year intervals. Ask to see the log.			Yes <input type="checkbox"/> No <input type="checkbox"/>
The school maintains accurate child protection records that are held securely and kept up-to-date. Ensure that any CPOMs entries have robust actions and follow up.			Yes <input type="checkbox"/> No <input type="checkbox"/>
The school operates safer recruitment procedures before and during interviews for new staff members and makes sure that all pre-employment checks are carried out. This			Yes <input type="checkbox"/> No <input type="checkbox"/>



information is held in a single central record.			
Staff and governors who are involved in the recruitment of new staff are trained in safer recruitment. There should be at least one person who is safer recruitment trained on every panel. You should ask to see the certification from recent interview panels.			Yes <input type="checkbox"/> No <input type="checkbox"/>
Procedures are in place for dealing with allegations of abuse against members of staff and volunteers that comply with locally-agreed, inter-agency procedures. Check that Headteachers know the Trust policy and that staff know what to do if they have any concerns.			Yes <input type="checkbox"/> No <input type="checkbox"/>
Procedures are in place for any allegations made against the Headteacher/Principal and staff are aware of what actions need to take place.			Yes <input type="checkbox"/> No <input type="checkbox"/>
Pupils are taught about how to keep themselves and others safe, including when they are online. Ask to speak to some pupils to validate this.			Yes <input type="checkbox"/> No <input type="checkbox"/>
The school has appropriate monitoring and filtering in place on its IT systems to limit the risk of pupils accessing harmful information online whilst in the school setting. Check with the IT team/Office Staff that they know what this is.			Yes <input type="checkbox"/> No <input type="checkbox"/>

**Any Other Comments/Information:**

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Signed:	
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***Essential questions which require evidence and triangulation. Staff you may want to speak to – Headteacher, Designated Safeguarding Lead, Heads of Year, SENDCO, Staff panel, Children Panel, SCR Lead.***

How do the children and young people keep themselves safe in school?

Do they know how to keep themselves safe out of school? How does school support them with this?

How does school deal with bullying or any behaviour which discriminates?

Does the behaviour policy which is delegated to each local board challenge any inappropriate behaviour?

How are any child protection concerns recorded and actioned? How are they escalated if local partnerships are not effective in supporting vulnerable children?

Are there clear procedures in place which are understood by all for protecting children against radicalisation?

How does the curriculum prepare them for this?

What procedures are in place for a child missing from school?

How can we ensure that the school supports parents and carers with e-safety at home?

Does the school show compliance with the Single Central Register requirements? All staff, governors and regular volunteers have been checked and are on the register, the school has letters of assurance for off site provision, contractors such as catering, building works etc. Gaps in employment history have been checked and signed off. Staff are entitled to work in the UK?

## TRUSTEE/GOVERNOR ROLES, RESPONSIBILITIES AND RELATIONSHIPS

Trustees/Governors are established as a partnership with “the school”, which includes the leadership team, teachers, parents, pupils/students and other stakeholders.

Role:

Clear responsibility for standards which includes:

- Staffing
- Curriculum
- Budget Setting and Spending
- Target Setting

Governors also support the Trust with policy making and monitoring progress

**But ...**

Governance responsibilities are at policy level and **not** in the day to day running of the school.

SLT are the educational experts with their experience, training and skills.

A good relationship/partnership is crucial. Trustees and Governors act as “critical friends” to monitor, support and challenge, where necessary. Trustees also have a duty to ensure Local Governing Boards have the skills to be effective in supporting schools to improve.

Challenges should be through insightful questioning and a deep understanding of school improvement.

Trustees and Governors can ask for additional information to support them in their work, but they must be mindful of teachers’ and leaders’ workloads.

In the Brighter Futures Learning Partnership Trust, everyone is striving for the same:

- High expectations
- High standards
- Pride in the school and pupils’/students’ achievements.