

Governor Visits Policy

**THE FEDERATION OF BROMSTONE PRIMARY AND
ST MILDRED'S PRIMARY INFANT SCHOOL BROADSTAIRS**



Approved and adopted by governors

**Name of School: THE FEDERATION OF BROMSTONE PRIMARY
AND ST MILDRED'S PRIMARY INFANT SCHOOL**

Approved: 10th January 2024

Review Date: January 2025

Policy Context

The board has a statutory duty to oversee the policies and direction of the school, to monitor its standards and be held to account for its conduct and performance.

The [Governance Handbook](#) states on the role of governor school visits:

Boards need to know their school if accountability is going to be robust and their vision for the school is to be achieved. Many boards find that visiting their school(s), 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 school is implementing their policies and improvement plans and how they are working in practice. Visits also provide an opportunity to talk with pupils, staff and parents to gather their views, though are unlikely to be sufficient for these purposes.

Boards are not inspectors, and it is not their role to assess the quality or method of teaching or extent of learning. They are also not school managers and should make sure they do not interfere in the day-to-day running of the school. Both are the role of executive leaders. If boards wish to spend time within a classroom, they need to be very clear why they are doing so.

Boards need clear processes for overseeing and monitoring school improvement and financial health, providing constructive challenge to executive leaders

Compliance with statutory and contractual requirements, through:

plans to ensure that other key duties such as inclusion, special education needs and disability (SEND) are undertaken effectively across the organisation, and monitoring and oversight of the impact of pupil premium and other targeted funding streams.

Visiting the school is not a statutory requirement, though visits play an extremely important role in order to know and learn how the school functions and to prevent any over reliance on headteacher information. Seeing the board agreed ethos, culture and values in action as well as its strengths and weaknesses, increases the board's first-hand knowledge and informs board self-evaluation and strategic decision making against its core functions.

The **National Governance Association and Governance Handbook** both note references to:

- not interfere in the day-to-day operational running of the school and
- the impact too many governor visits may have on the operational school day.

Purpose of the Visit

The purpose of the visits may differ for the model of governance adopted, also for statutory and delegated/link roles these will depend on the information and scrutiny of the areas at any board or committee meetings.

- **Committee Model** - seeing/confirming that the actions reported at the board/committee meeting are happening in the school and recording any subsequent impact
- **Statutory and Delegated/Link Roles** - holding leaders to account by questioning and recording responses and ensuring compliance. The information will be shared with the board for further consideration

Time Commitment

It is recognised that the amount of time that a governor can commit to a visit will vary but in general governors should expect to make visits in accordance with their governance structure and agreed terms of reference (ToR). An explanation for each area is included in the policy frequency of visits section but in general:

- **Committee Model** - governors should make at least **one** visit a year and no more than **three** visits unless the school circumstances necessitate otherwise.
- **Statutory Role** - visit the school three times a year.
- **Delegated/Link Roles** - visits as per statutory role or as agreed by the board.

Monitoring Schedule/Planning

The board should develop a schedule of planned visits over the year, which could include visits resulting from committee meetings, allocated roles, SIP monitoring, statutory and compliance visits. Governors should be appointed with reference to their skillset and to cover the school improvement priorities and areas of compliance (see Governance Handbook).

Governors should arrange their planned visits in advance with the headteacher who has the responsibility for the day-to-day management of the school. The board should:

- review their school visits policy, protocols and procedure annually to ensure its effectiveness
- ensure the approved policy is circulated to all staff via the headteacher.

Reporting Back to the Board

Reporting should be documented and submitted in good time, aligning with the legal and/or board requirements or committee/board meeting agendas, so that strategies, interventions, and impact can be seen in action. The written reports should be on the agreed template, included in the policy, and circulated to all governors in advance of the meeting to enable further discussion. The model of governance adopted will reflect the content and context of the submitted report:

- **Committee Model** - board or committee minutes will document and evidence questions and discussion; therefore the visit will be to confirm information/actions etc have been seen and any impact recorded
- **Statutory/Delegated Roles** - monitoring visits reports will document and evidence questions and discussion undertaken during the visit to confirm compliance and support the board with holding leaders to account.

For either model of governance

- Each monitoring visit should have an agreed clear purpose.
- Role descriptors to be set up, agreed and reviewed regularly by the board to aid governors in their understanding and expectations in carrying out monitoring visits.
- Whole governing board days in school can also be a valuable tool in knowing your school, with a planned focus and feedback.

Virtual vs Face to Face Monitoring

At times it may be appropriate and more convenient to carry out a virtual visit which for example, can involve meeting with a member of staff and/or pupil groups using video conferencing. Some areas of focus may be suited to virtual visits; however, it is important that governors experience school life, culture and ethos during a face-to-face visit.

Boards should be mindful of the workload and wellbeing of staff when agreeing the monitoring schedule, including timing, number of visits and practicalities of setting up and undertaking both virtual and face to face meetings

To enable understanding and despite the delegation of responsibilities to committees and monitoring pairs for collective decision making, it is vital the board ensures that all governors have a broad understanding of all areas of the governance core functions.

If governors cannot undertake this commitment, they should question whether they can make a realistic and valuable contribution as a governor in line with the board's agreed Code of Conduct

Governing Board Monitoring Visits Policy

A breach of this policy is a breach of the Code of Conduct

Introduction

This policy applies to school visits made for the purpose of governance and not to visits to the school site that any individual may make in another capacity e.g., as parents, priests, professional advisers, volunteers or members of staff.

All school visits will:

- Have a clear focus, linked to strategic priorities, and delegated statutory governor roles, be timely and planned against the board approved monitoring schedule and board meetings.
- Be arranged with adequate notice through the headteacher who will agree the visit with the relevant members of staff
- Have a written report to evidence the visit and effective delegated function as well as enable further scrutiny, challenge and strategic decision making by the board
- Be of value to the board in holding the school to account and demonstrably evidenced to outside agencies e.g., Ofsted, the Local Authority, Diocese, DfE

Governor Conduct

Governors undertaking visits will comply with the school and board's codes of conduct, any DfE guidance and the standards of presentation expected of staff. They will be mindful that they are representing the whole board through their words and actions and will understand their strategic role by not becoming operational. The board's code of conduct will contain reference to the governor board monitoring visits policy and subsequent steps for any breach.

Training

Governors should ensure they understand their monitoring remit, undertaking relevant training to keep up to date with best practice and latest statutory and legislative requirements. Role descriptors may aid governors in their understanding and expectations in carrying out their monitoring and statutory visits.

All governors need to ensure they have a broad understanding of all areas of delegated governance and undertake training where necessary.

Governor Reports Following Visit

It is a statutory responsibility (for maintained schools) for any delegated function to be reported back to the Board. The [Roles Procedures and Allowances 2013 regulations \(20.2\)](#) state:

'Any individual or committee to whom a function of the governing body has been delegated or that has otherwise exercised a function of the governing body, must report to the governing body in respect of any action taken or decision made with respect to the exercise of that function.'

Governors undertaking their visits will have the opportunity to discuss the visit, including any concerns, with the headteacher immediately or soon after the visit.

The Governor Visit Report Template (see appendix A and B) will be completed after each visit, containing the visit findings and questions to be raised at the board or committee meeting. A draft will be shared with the headteacher and any other members of staff involved in the visit for any comments concerning factual accuracy; a final version will be sent to the governance professional (clerk) to be included in the agenda and as a supporting paper for collective

discussion and further constructive strategic questioning at the next board or committee meeting.

Confidentiality

Confidentiality should be adhered to during and regarding visits. Comments should be limited to the headteacher with whom the visit was arranged and 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 the governor visit reports. Staff roles should be used within reports, not names.

Frequency of Visits

Each governor/trustee/local board/academy committee/advisory member will undertake visits as agreed in their approved ToR's, monitoring schedule or scheme of delegation.

- **Committee Model** - should make at least **one** visit a year and no more than **three** visits unless the school circumstances necessitate otherwise e.g., if the school is in the Ofsted category of requires improvement (RI) or inadequate and a circle model
- **Statutory Role** - There is an expectation that the **statutory delegated governors** for safeguarding, special educational needs and disabilities (SEND), careers guidance (secondary), and health and safety and finance* (LA maintained schools) **will visit the school three times a year**.
- **Delegated/Link Roles** - boards may consider it important from a best practice perspective, although not statutory, the addition of delegated/link governors for pupil premium, whole school wellbeing culture, attendance and any other identified by the board. **Visits as per statutory role or as agreed by the board.**

The board must recognise the essential role of the delegated governor functions in reporting to the board at its committee and board meetings, to enable any delegated (to committees) or collective strategic (full governing board) decision making.

*For finance, there is the additional expectation that the board/committee and finance governor receives:

- clear and concise monitoring reports of the school's budget position at least six times a year
- monthly reports being provided to the chair and chair of the finance committee finance lead, for Kent schools see [Section 4 – Governors' Guidance notes on the Management of School finances](#) and [SFVS](#)

Receiving operation lead financial reports does not replace the need for the board to monitor and scrutinise the school finances, and evidence that it has done so.

Review

This policy, protocol and procedure should be reviewed by the board every academic year alongside the code of conduct.

This Policy will be circulated to all new governors upon appointment.

Purposes of a Governor Visit

The benefits of monitoring visits to governors either within their monitoring role or as whole days.

- To enable the fulfilment and evidence of delegated statutory governor roles of safeguarding; health and safety; SEND; careers guidance (secondary); finance (LA maintained schools).

As a point of best practice Governor Services recommend that boards also allocate monitoring roles for pupil premium and other target funding, attendance, whole school wellbeing culture, and cyber security as signposted by the DfE.

- To see the strategies in action as outlined in the school improvement plan e.g., meeting with the subject lead of an area for improvement, seeing first-hand and learning about the impact of the adopted strategy and how this translates through to classroom practice and children's learning.
- To improve knowledge of the school and its needs, its staff, improvement priorities, strengths and weaknesses, preventing overreliance of headteacher-only information.
- To see in action the impact of specialist funding i.e., pupil premium, sports premium (primary), recovery premium and the national tutoring programme.
- To ensure financial probity by providing robust and effective governance to ensure the viability and efficiency of the organisation through effective business and financial planning and processes.
- To develop an understanding of issues facing the school and how they are dealt with on a day-to-day basis to inform strategic decision making
- To observe the impact of policies in action including monitoring the implementation of policies e.g., safeguarding, behaviour, health and safety, SEND, attendance, careers guidance, finance.
- To gain an understanding of the broad full curriculum or a curriculum subject area as relevant.
- To see the use of resources and how the premises are utilised, understanding the environment for teachers and pupils.
- To recognise and celebrate success.
- To evidence the governing board's ethos, vision and values in action.
- To show themselves as part of the school and to gain stakeholder engagement with pupil, parents, staff and the wider community e.g., pupil voice, school council, parent forum, parent evenings.

The potential benefits to staff

- To ensure governors understand how school priority strategies are embedded in practice, understanding the reality of the classroom and environment.
- To enhance the continuous professional development of middle and subject leads
- To get to know and build positive professional relationships with governors.
- To improve the understanding of the governors' roles and responsibilities including the responsibility to work with executive leaders to address unnecessary teacher workload.
- To feel valued.
- To have an opportunity to reflect on the impact of policies and procedures through discussion.
- To highlight the need for/impact of particular resources.
- To have mechanisms for enabling the board to listen, understand and respond to the voices of staff

The potential benefits to students

- To ensure governors understand the reality of the classroom environment, broad curriculum and school life.
- To get to know governors.
- To better understand governor roles and responsibilities.
- To give feedback about the school and their views of the impact of policies to the governors.
- To have mechanisms for enabling the board to listen, understand and respond to the voices of students

The potential benefits to parents

- To ensure governors understand the issues that parents may face.
- To engage meaningfully with governors
- To get to know governors.
- To have an understanding of governor roles and responsibilities.
- To give feedback about the school to the governors.

What a visit is not about

- Visiting classrooms to observe a lesson, unless as part of an accompanied learning walk against a specific school improvement priority. This prevents any potential misunderstanding of a class visit being regarded as a form of inspection to make judgements about professional expertise of a teacher.
- Undertaking a staff operational role e.g., touring the school undertaking health and safety checks, even if professionally qualified in this area.
- Checking on progress or receiving information of individual children.
- Pursuing a personal agenda.
- An opportunity to tackle staff about specific issues not related to the monitoring focus or the statutory/ delegated governor roles.
- An opportunity to take on individual parental issues not related to the strategic governor roles.

Protocols or Ground Rules for Visits

Governors should:

- ensure the visit has a clear focus linked to the school improvement plan, area of compliance and/or area of governor responsibility.
- individually understand the board/s and their delegated area of responsibility, enabling preparation to ensure they provide the constructive challenge required.
- remember that during any visit their role is strategic not operational.
- ensure, in preparation for their visit, they have undertaken relevant training and read any relevant policy, statutory guidance or supporting documentation.
- arrangements have been made for the headteacher to liaise with the member of staff responsible for the school/priority/policy objective to arrange the date and schedule the meeting.
- enable staff to have the opportunity to explain the context of any lesson on the rare occasion that a governor visits a classroom
- not interrupt lessons by asking teachers questions on the rare occasion that they may visit the classroom.
- talk to students during learning walk visits to lessons, about their understanding and learning journeys, but must not ask questions about the teacher's conduct of the lesson.
- ensure that they abide by the board agreed school's code of conduct as well as the boards own code of conduct with the expectation that they follow the same behaviours to understand how they will be addressed and how to address others as well as appropriate dress code.
- have a clear understanding that a breach of the governor monitoring visit policy will be dealt with as a breach of the board's code of conduct.
- formally write reports on their visits using the board approved templates ensuring that draft reports are sent to the Headteacher for factual accuracy comments prior to the final report being produced.
- ensure monitoring visit reports will be circulated in advance, via the governance professional (clerk), for either the relevant committee or board meeting to enable discussion, triangulation and any key questions to be raised.

- ensure evidence is recorded in the minutes to show the impact of the visit
- confirm the evidence already discussed as an agenda item in board or committee meetings
- ensure that consideration has been given for the suitability of any delegated in-school link/monitoring role allocated to the governors who are members of staff.

Annual Programme of Visits

A programme of delegated governor visits (monitoring schedule), spread evenly across the school year in consultation with the headteacher, should be planned using the school priorities, school improvement plan, board requirements, needs of compliance e.g. finance, committee meeting timetables and governor roles by skillset; this should be approved alongside the statutory/ delegated/link monitoring governor roles.

Regular analysis of this schedule enables governors to ensure they are monitoring, evaluating and triangulating against the current school priorities and statutory areas and reporting back to the committees or board as appropriate. This enables the board to know the school in terms of being able to evidence this to Ofsted or other outside agencies and demonstrate constructive challenge and impact. The number of visits by each governor should be linked to the governance model adopted by the board and allocated statutory roles.

Committee Model - minimum of **once a year and not more than three times a year**, unless the school situation necessitates.

Statutory Roles - there is an expectation that the statutory delegated governors for safeguarding, special educational needs and disabilities (SEND), careers guidance (secondary), and health and safety and finance (LA maintained schools) will visit the school **three** times a year to monitor these areas.

Delegated/Link Roles - as for statutory roles or as agreed by the board.

For federations, boards **must** consider how they will fulfil their duties in regard to monitoring **each individual school** and DfE identified delegated areas.

Example of governor monitoring visits/days may include

- Learning walks with members of staff.
- Pupil voice in the class or interviews in groups e.g. their understanding of how they are receiving a quality inclusive education.
- Looking at pupils' work against; oversight of the curriculum and policies e.g. marking policy.
- Monitoring implementation of a policy e.g., behaviour, equality, safeguarding, finance, attendance
- Gaining an understanding of the broad curriculum, or particular area.
- Seeing in action the impact of specialist funding.
- Ensuring finance processes are in place.
- Seeing in action the deployment of staff and impact of any change e.g. reduced class sizes/split classes.
- Reviewing the environment, the condition and maintenance, use made of the buildings or the site and impact of the resources of the school.
- Ensuring that governor monitoring visits fulfill the requirements of the statutory link governor roles.
- Confirming information/actions reported at board meetings.
- Visiting break and lunchtimes with staff and pupils.
- School council
- Parent forum
- Gaining an understanding of the impact of spend of funding with spending leads.

- Monitoring the boards culture, ethos, and values and for church schools, ensuring the distinctive Christian character is maintained against agreed expectations.
- Parental engagement at the start; end or during parental events in school.
- Monitoring British values
- Monitoring the preparation for the next stage of education.

Monitoring and Review of School Visit Policy

The policy should be monitored and **reviewed annually** alongside the code of conduct and terms of reference/scheme of delegation.

Areas to consider when reviewing

- Are our visits achieving the potential benefits we identified?
- Are we fulfilling our core functions?
- Are our individual reports having impact within the committee or board meetings?
- Do our board and committee discussions from the governor reports show **further collective constructive challenge and holding to account** which is evidenced in the minutes?
- Are our visits timely against the school improvement plan?
- Are visits reports received in time for relevant board meetings?
- Do we have the right governor monitoring roles against the current school priorities and areas of compliance?
- Are all governors aware of their responsibilities? Do they understand their role? Do we have role descriptors?
- Are statutory/delegated/link governors appointed to their roles due to skillset?
- Are all governors keeping up to date with best practice and latest statutory/ legislative requirements?
- Are we better informed and can evidence the accuracy of Headteacher and SLT reports?
- Have we engaged meaningfully with all parents and carers?
- Have we engaged with stakeholders to understand their views to use as part of informed strategic decision making?
- Is there anything we need to change in how visits are conducted from feedback from stakeholders?
- Have there been any unexpected benefits?
- How can we make our practice even better?

Governor Visits - Good Practice

Preparing for a Visit

- Check the agreed policy and schedule for governors' monitoring visits and any DfE relevant governance and/or statutory guidance.
- Discuss the visit and agreed timetable with the headteacher and ensure that any member of staff who will be involved in the visit, understands the arrangements.
- Arrange a mutually convenient time to visit, within the monitoring schedule and board meeting windows, with the headteacher.
- Clarify the purpose of the visit as outlined within the monitoring schedule and undertake any background preparation reading required.
- Understand your strategic monitoring role and responsibility including completing relevant training. Do you have a role descriptor explaining your responsibilities?
- Review the milestones and action points in the School Improvement Plan. What are the relevant school policies associated to this area? How does this determine the activities I am interested in seeing in action? What questions do I want to ask?
- Discuss with the headteacher/staff lead if any new supporting information is available, e.g., Ofsted report, updated improvement plan, note of visit, performance data, subject lead report, policy.
- Ensure that you are familiar with safeguarding and health and safety procedures
- Read both the board and staff code of conduct to ensure understanding of the professional behaviours required.

During the Visit

- Remember you are making the visit on behalf of the governing board; it is not appropriate to make judgements or promises on behalf of the governing board.
- Be punctual, reporting to reception and signing in as a governor. Wear a badge to identify yourself as a governor. Keep to the agreed timetable but be flexible to the school needs.
- Decide with the headteacher how you will be introduced and how you will address staff and pupils
- Be courteous and professional throughout the visit, friendly not critical, including thanking members of staff before leaving.
- Remember it is a monitoring visit and not an inspection. You are there to learn and:
 - **Committee Model** - see the information you have been told is happening with your own eyes.
 - **Statutory Role** - specific monitoring around the allocated area to report back to the board
 - **Delegated/Link Role** - monitoring around the allocated area to report back to the board
- Keep to the role/focus agreed; only talk to students if invited/agreed to do so.
- Observe discretely. Depending on the context of the visit, excessive note taking can be disconcerting and may make your visit look like an inspection though recording needs to be balanced with being able to capture the questions and answers especially in a circle model
- Interact, don't interrupt and remain strategic.
- Remember why you are there. Don't lose sight of the purpose/focus of your visit.
- Respect confidentiality
- Meet the headteacher at the end of the visit and discuss what you have seen, including any issues or concerns you may have. Refer to the purpose/focus of the visit. Consider together whether it has been achieved.
- Ensure you have signed out

After

- Share any concerns with the headteacher and chair, however trivial. Use the opportunity to clarify any issue you remain unclear about.
- Thank the staff by email via the headteacher for contributing to the success of the visit and for supporting you in your role as a governor. Be open, honest, and positive.
- Make more notes as soon as possible after your meeting and any observations while it is still fresh in your mind.
- When drafting the report ensure individual children or staff members (other than the member of staff involved with the visit) are not identified in school visit reports. Use role titles where appropriate.
- Ensure that your visit is included as an agenda item at the next board or committee meeting.
- Complete the agreed visit template proforma and send the draft to the headteacher for fact checking and comment, ensuring timescales are met in sending to the governance professional (clerk) for onward distribution at least seven days in advance of the board or committee meeting. Ensure that all the questions and answers are captured, with key questions added following evaluation of the visit to be raised at the next board meeting. (see appendix A).
- Reflect: how did that go? Has the visit enhanced relationships? Have I learned more about the school? Have I helped the board collectively fulfil its duties with constructive challenge and holding to account? Are there actions the board will want the next visit to follow up/focus on following discussion? Do I need to undertake training to increase my skillset to fulfil the monitoring role effectively? How has this visit had impact at the board meeting?

Informal Visits

Visits may also take place in an informal capacity for less formal occasions such as school events, plays, sports day, and celebration events. 'Discreet' information can be gathered on these visits which build on your knowledge of the school. Visiting governors should ensure that they follow the governor visits protocols as appropriate and consider how they will feedback to the board having completed the report using the informal template (appendix B).

Areas not considered as a governor monitoring visit

It is vital that everyone is clear about the capacity in which they are visiting and not to confuse their roles when they wear more than 'one hat' within the context of the school. If a governor undertakes, as an individual/professional in an advisory or operational role within the school, **the role/function must be declared on the register of business interests and at board meetings**; and they **must not be appointed** as the statutory or delegated governor/part of the monitoring pair for this area/function. Key consideration must be undertaken for the suitability of any delegated in school link/monitoring role allocated to the governors who are members of staff.

For example, times when governors may be visiting the school **not** as a governor

- To help in a class as a volunteer
- To lend a helping hand with a school event or educational visit as a volunteer
- To speak to a teacher/headteacher in relation to their own child
- Attending a school function or educational visit as a parent/relative/invitee
- Visiting in relation to your position as the local priest, councillor, member of staff or providing commissioned or uncommissioned support (which needs to be declared) in your professional capacity, e.g., advising on finance, amending/devising the school website etc



Name:	Date:
Delegated Governor Role:	
Focus of visit, links with the School Improvement Plan. <i>(How does the visit relate to a priority in the School Improvement Plan or is it in a statutory governor delegated role?)</i>	
Areas and summary of planned activities. Including departments or areas of school visited, staff and pupils that the governor met during the visit <i>(Previously agreed by the governing body with the headteacher; governors should refer to staff by their role or job title and not by name)</i>	
Observations and comments by the governor <i>(e.g., what you saw; questions asked with answers given; what you learned relating to the focus of the visit). Ensure this section contains the constructive challenge and accountability against the required governance statutory responsibilities and functions. See Governance handbook.</i>	
Comments on Safeguarding culture observed during visit <i>(e.g., in relation to KCSIE and Child Protection policy)</i>	
Comments on Inclusion and SEND culture observed during visit <i>Where there is not a direct contextual link to SEND, reflect on how pupils with SEND might be affected by any issues observed/to be raised. The principle of thinking about SEND in all decisions, benefits everyone in the school. eg. inclusive practice seen within the school.</i>	
Comments on whole-school wellbeing during visit <i>Where there is not a direct contextual link to wellbeing, reflect on how the board's due regard for the wellbeing and mental health of the school leadership team and teaching staff more broadly, has been observed</i>	

3 key questions I would like to raise at the board meeting

- 1.
- 2.
- 3.

Actions for the board to consider or clarifications needed:

(e.g., the way resources are allocated; the way the school communicates; progress in implementing a key policy)

Impact of the visit and follow up next visit planned focus:

Signed: Governor

Meeting to be considered at:

Record of a Governor's Visit to the School – Informal

Name:	Date:
Focus of visit <i>(event, celebration, parents evening, function)</i>	
Observations and comments by the governor <i>(e.g., what you saw; what you learned, behaviour, stakeholder interaction/engagement, safeguarding, inclusion, SEND, H&S)</i>	
How will this report be considered at the board meeting <i>(Verbal feedback, raised as a question, raised as part of triangulation)</i>	
Signed: Governor	