



Learn-AT

Learning ~ Fellowship

Local Governor School Monitoring Visits Policy

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Please note that this policy supersedes and replaces any equivalent policies or sections of policies currently existing at the Academies and Trust.

Local Governors are valued members of the Learn-AT professional learning community. They work in fellowship with colleagues in schools on behalf of trustees, providing assurance for the Trust Board that schools' statutory obligations and Trust policies and procedures are being implemented correctly, effectively and with integrity. Local governors provide an alternative perspective informed by their personal and professional experience and act as critical friends to school leaders. Part of their role involves visiting schools to carry out their monitoring duties as welcome and invited volunteers. Trustful, respectful, caring and professional relationships between local governors and school colleagues are essential to effective governance and school leadership and management, and to successful and productive governor monitoring visits.

1. Aims

1.1. This policy aims to ensure that all governors, trustees and school leaders understand:

- the purpose of local governor monitoring visits;
- the Trust's expectations of school leaders and other colleagues before, during and following a local governor monitoring visit;
- the Trust's expectations of local governors before, during and following monitoring visits including preparation, expected conduct and reporting back to the LGB and the Trust Board.

2. Purpose of visits carried out by local governors or trustees

2.1. Visiting school on a planned, regular basis allows governors/trustees to:

- better understand their school's strengths and areas for development and the ways in which school leaders and the Trust monitor and evaluate school performance and identify priorities; local governors *monitor the monitoring*. This means that rather than duplicating monitoring activity that the Trust or school already undertakes, it the role of local governors to provide assurance for the Board that monitoring activities such as safeguarding audits, school reviews, internal financial audits etc have happened as planned and that recommendations have been acted upon.
- determine if agreed policies and procedures are working in practice;
- identify how resources are being used;
- show staff and pupils that they are interested in the life, work and

achievements of a school;

- experience the culture and ethos of the school;
- understand the perspectives of pupils, parent and staff.

2.2. Monitoring visits should focus on:

- strategic priorities and key policies agreed by the Trust and the LGB;
- the evaluation of progress in achieving the priorities on the school's strategic development or improvement plan. Are the things people say are happening, actually happening?
- establishing that Trust monitoring and evaluation systems are in place and recommendations are being implemented;
- seeking assurance that the needs of pupils are being met (such as safeguarding, SEND and disadvantaged pupils eligible for Pupil Premium funding).

3. Frequency of visits

3.1. The frequency of governance visits should reflect the annual monitoring schedule established by the LGB and agreed with school leaders and relevant staff. Visits should be scheduled to allow local governors/trustees to monitor the curriculum and pupil achievement, the school's statutory obligations such as safeguarding, health and safety and how effectively SEND funding, Pupil Premium, PE/Sport Premium and capital grants are spent. Local governors also visit schools to observe and participate in relevant activities and strategic milestones in school development.

4. Visits programme

4.1. Local governors carry out regular school visits in order to meet the Trust's statutory obligation to monitor the school's effectiveness. These visits are linked to the school's improvement priorities and will be agreed and confirmed with the chair of governors and senior leaders each term.

4.2. There are three main types of visit:

- formal monitoring visits, where local governors discuss the progress of the school in a specific area with the relevant staff member;
- learning walks, where local governors tour the school with the relevant staff member to get a feel for an agreed area and may talk to a range of staff members and pupils;
- attendance at special school events, such as assemblies, productions, fund-raising activities, parent forums etc.

Local governors with specific responsibilities such as health and safety, special educational needs, Pupil Premium, PE and Sport and Safeguarding attend:

- a termly 1:1 monitoring visit with corresponding staff leads
- other meetings as required or requested on issues specific to their areas of responsibility (for example, local governors in schools with a cluster governance structure may also conduct visits in other schools in the cluster where appropriate and agreed).

4.3. All Local Governors contribute to the programme of visits in ways appropriate to their skills and areas of responsibility.

5. Expectations of Local Governors and School Leaders before, during and following a monitoring visit

Before visits: Local Governors

5.1. Visits should normally be scheduled annually in advance, confirmed termly and be clearly visible in the school's and Governor Hub calendar.

5.2. Local Governors should pay due regard to:

- how the visit fits with the schedule of LGB and committee meetings, to allow for timely feedback and discussion
- how to avoid visits clashing with important events and/or busy periods in school life
- the workload implications for staff who are likely to be involved in the visits

5.3. Governors/trustees are encouraged to prepare for their visit. This may include:

- reading and familiarising themselves with the LGB's protocol for visits and the expected conduct
- reading and familiarising themselves with the school's policy for visitors and volunteers (this is different from the governor/trustee visits policy) that includes relevant health, safety and safeguarding instructions (for example how to respond to a safeguarding disclosure during the visit)
- reading the background information relating to the focus of the visit, such as relevant section(s) of the strategic plan, headteacher's or other leaders' evaluation reports and/or analysis of performance data, policies, other stakeholder information
- clarifying the purpose of the visit with the headteacher and or relevant member of staff
- confirming the visit schedule and activities at least one week before the visit date.

Before visits: school leaders

- the headteacher or the leader hosting the visit should be aware of the visits scheduled for the year and know when to expect them
- the leader hosting the visit should liaise with the visiting local governor in advance of the visit so that arrangements and an agenda for the visit are agreed at least a week before the visit is due to take place
- leaders should ensure that other school colleagues are aware that the visit will be happening
- the leader hosting the visit should understand the purpose of the visit and have relevant documentation ready to share with the visiting governor during the visit.

During visits: local governors

5.4. When visiting the school in a governing capacity, local governors should:

- arrive in good time and follow the school's procedures (such as signing in, producing identification, wearing a visitor's badge)
- adopt a friendly and receptive approach that puts school colleagues at ease
- be respectful of the school at work
- ensure any notes taken during the visit are used only for writing up a factual Governor Visit Report, and do not identify individuals or include evaluative judgements or opinions about the quality of teaching and learning
- ask relevant questions that are closely linked to the purpose of the monitoring visit
- remain with the staff member hosting the visit throughout the visit
- acknowledge the staff and pupils they meet

5.5. Governors/ trustees are also expected to behave in line with the Learn-AT governance code of conduct, and their obligation always to maintain confidentiality.

During visits: school leaders

- allocate appropriate time for the visit host to engage with the visiting local governor, and accompany them throughout the visit
- introduce the local governor to colleagues and children encountered during the visit
- make provision for a confidential meeting space to discuss the focus of the visit

- share information and answer questions appropriate to the visit's purpose openly and transparently, while respecting data protection obligations and individual confidentiality

Following visit: local governors

- 5.6. A report should be completed as soon as possible after each visit. A draft will be shared with the headteacher and any other members of staff involved in the visit. When agreed, a final version will be included in the papers on Governor Hub for discussion in the next LGB meeting (this may be the full LGB meeting or a committee, as appropriate). The visiting local governor should thank those involved in supporting the visit and note this in the report.

Following visit: school leaders

- 5.7. The school leader who hosts the visit should read the draft visit report as soon as possible after receiving it, make any factual accuracy corrections in track changes and provide feedback and/or suggestions for amendments in comments. The amended draft should be returned to the visiting local governors no later than one week after receiving it.

6. Safeguarding is everybody's business

- 6.1. **If a safeguarding concern is raised or governors see something that is a potential safeguarding issue this should be reported to the school's Designated Safeguarding Lead immediately.**

Appendix 1: Template report for a monitoring visit

Formal monitoring visits are where you discuss the progress of the school in a particular area with the relevant staff member. Use this form as a reminder of what to look for and what to ask.

| Part 1: plan the visit | |
|--|--|
| Name and role of governor(s) | |
| Name and role of staff member(s) | |
| Date and time of visit | |
| Agreed focus Make sure you focus on this agreed reason for the visit. Avoid getting distracted by other issues that have not been agreed with the member of staff. | |
| Relevant school improvement priority This might be taken from the school improvement plan (SIP) objectives or the school's overarching vision. | |
| Questions to ask Note specific questions you want to ask based on the SIP, or points to follow up on from a previous visit. Share these questions with the staff member you are visiting in advance, so they can prepare. Search The Key for School Governors for questions specific to the purpose of your visit. For example, you can search for ' safeguarding questions .' | |

What is the school doing within this area of focus?

Tips:

- Ask open questions beginning with 'what', 'how', 'when', 'how often', 'why', 'who' and 'where'
- Do not be afraid to clarify any terms or acronyms you're not familiar with
- Remember you are **not** there to pass judgement on staff or inspect them – you remain an observer
- When writing the report, use neutral language and do not name individual teachers and pupils

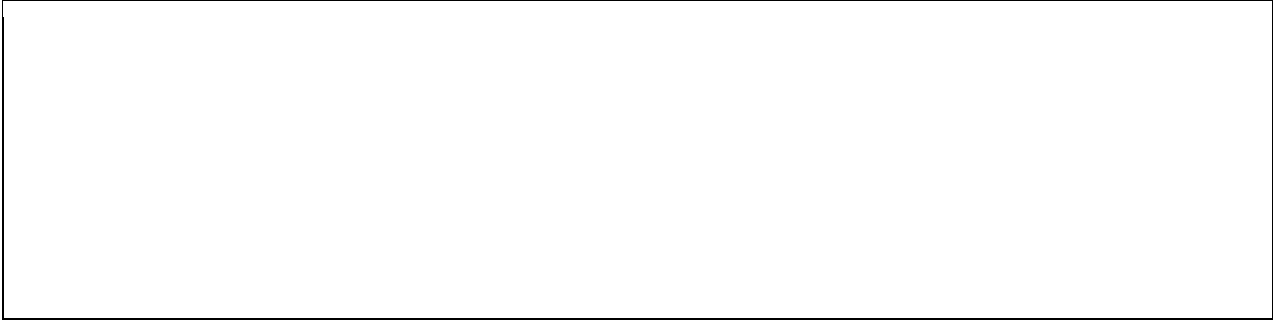
How do you know the school's actions are having an impact?

Remember:

- Include specific evidence that demonstrates the positive impact the school is having in this area
- Where a positive impact has not been made yet, note down why that is and what steps are being taken to make progress
- Add any further evidence you would like to see to help you make a better assessment of the impact

What successes stood out and why?

Questions and clarifications to follow up with the headteacher or chair of governors



Appendix 2: Template report for a learning walk

Learning walks are where you will go around the school with the relevant staff member to get a feel for a particular area. You are likely to talk to a range of staff members and pupils. Use this as a reminder of what to look for and what to ask.

| Part 1: plan the walk | |
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| Name and role of governor(s) | |
| Name and role of staff member(s) | |
| Date and time of visit | |
| Agreed focus <i>Make sure you focus on this agreed reason for the visit. Avoid getting distracted by other issues that have not been agreed with the member of staff.</i> | |
| Relevant school objective or priority <i>This might be taken from the school improvement plan (SIP) objectives or the school's overarching vision.</i> | |
| Questions to ask <i>Note specific questions you want to ask based on the SIP, or points to follow up on from a previous visit.</i> <i>Share these questions with the staff member you are visiting in advance, so they can prepare.</i> Visit GHub governors' question bank for questions specific to the purpose of your visit. | |

| Part 2: on the walk |
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| General notes from discussions with staff <ul style="list-style-type: none"> • Ask open questions beginning with 'what', 'how', 'when', 'how often', 'why', 'who', 'where' and 'can you show me...' • Do not be afraid to clarify any terms or acronyms you're not familiar with • Remember you are not there to pass judgement on staff or inspect them • When writing the report, use neutral language and don't name individual teachers |

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| General notes from discussions with pupils Remember: <ul style="list-style-type: none">• Do not ask them for pupils' views on a specific teacher• Do not record pupils' names |
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| General notes on the school environment and overall atmosphere Note: <ul style="list-style-type: none">• Whether the governors' vision of the school is replicated on the ground• Any issues with the school site you see e.g. broken equipment or lack of resources |
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| What successes stood out on the learning walk and why? |
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| Questions and clarifications to follow up with the headteacher or chair of governors |
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