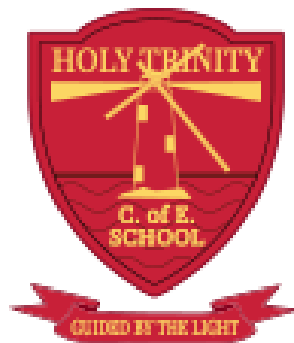


# **Holy Trinity C of E Primary School Governor Monitoring Visit Policy**



Learning and caring together, building a firm foundation for the future.

‘Love, Honesty & Respect’

**Approved and adopted by governors: July 2018**

**Date for review: September 2019**

The governing 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, particularly during the day, is a helpful way to find out more about the school. 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.*

For the circle model, the governor monitoring visits, performed by the delegated governor roles (including monitoring pairs), are replacing the agenda items, challenge and support which would have taken place within a committee meeting. Therefore for the board to be able to fulfil its core functions it will need to ensure that a robust policy and practice for governor delegated monitoring responsibility is in place. These visits will hold the school to account for its functions, strengths and weaknesses thereby increasing the governing board's collective first-hand challenge and knowledge, informing self-evaluation, holding to account and strategic decision making. It is recognised that the amount of time that a governor can commit to a visit will vary but in general governors, in their delegated monitoring roles, should undertake **3** visits a year unless the school circumstances necessitate i.e. school category of RI or inadequate. If governors cannot make this commitment they should question whether they can make a realistic and valuable contribution to being a governor. Whole Governing board days in school alongside delegated monitoring can also be a valuable tool in knowing your school with a planned focus and feedback.

This policy sets out protocol and procedures which once approved have been shared with staff, enabling governors and staff to gain the most from the monitoring visit.

Governor delegated monitoring roles should align to the priorities determined on the School Improvement Plan, with an agreed monitoring visit schedule that is timely to the school and board meetings and reported back, for documented discussion and questions, in replacement of a committee at the board meeting. The monitoring schedule should also offer provision for the statutory monitoring roles. Each monitoring visit should have an agreed clear purpose.

Governors should arrange their planned visits in advance with the Headteacher who has the responsibility of the day-to-day management of the school. The Governing board should review their school visits policy, protocols and procedure annually to ensure its effectiveness with the approved policy circulated to all staff.

# Governing Board Circle Monitoring Visits Policy

## Introduction

This policy applies to school visits made for the purpose of governance, where committees have been replaced by board meetings, and not to visits to the school site that any individual may make in other capacities e.g. as parents, priests, volunteers or members of staff.

## Purpose

All school visits will:

- Have a clear focus, linked to strategic priorities and designated governor roles, be timely planned and on the approved monitoring schedule which is agreed by the full governing board
- Be arranged with adequate notice through the Headteacher who will agree it with the relevant members of staff
- Be of value to the governing board in collectively holding the school to account in replacement of committees and which can be demonstrably evidenced to outside agencies e.g. Ofsted or the LA

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

## Governor Conduct

Governors undertaking visits will comply with the school and governing board's codes of conduct and the standards of presentation expected of staff. They will be mindful that they are representing the whole governing board through their words and actions. The governing board's code of conduct will contain reference to governor visits.

## Governor reports following visit

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 attached 'Delegated Governor Report' will be completed after each visit. A draft will be shared with the Headteacher and any other members of staff involved in the visit and, when agreed, a final version will be sent to the clerk to be included in the supporting papers for an agenda discussion in the next governing board meeting.

## Confidentiality

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

## Frequency of Visits

Governors, trustees and local governing board/ advisory members will undertake visits as agreed in their approved monitoring schedule with no more than three visits per academic year unless the school circumstance necessitates.

## Review

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

## Purposes of a governor visit

The benefits to governors within their individual delegated monitoring roles:

- To assist the governing body, within their delegated area of responsibility, in fulfilling its statutory duties and demonstrate their accountable role in replacement of committee agenda items.
- 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 and learning about the strategy adopted and how this translates through to classroom practice and children's learning.
- To challenge, support and improve knowledge of the school, its staff, needs, priorities, strengths and weaknesses within their delegated area of responsibility
- To develop an understanding of issues facing the school and how they are dealt with on a day to day basis to inform collective strategic decision making.
- To observe the impact of policies in action including monitoring the implementation of a particular policy e.g. safeguarding, behaviour

The benefits to governors within general monitoring e.g. focussed or whole GB days:

- Gaining an understanding of a particular curriculum area or year group 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 boards approved culture, vision and values
- To show themselves as part of the school and to gain stakeholder engagement with pupil, parents, staff or the wider community e.g. Pupil voice, school council, parent forum

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 get to know and build positive relationships with governors
- To understand better the governors' roles and responsibilities
- To feel valued
- To have an opportunity to reflect on the impact of policies and procedures through discussion
- To highlight the need for particular resources

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 understand better governor roles and responsibilities
- To give feedback about the school and their views of the impact of policies to the governors

The potential benefits to parents:

- To ensure governors understand the issues that parents have
- To get to know governors

- To understand better 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 confusion on a class visit being confused as a form of inspection to make judgements about professional expertise of a teacher.
- Undertaking staff role's e.g. touring the school undertaking health and safety checks as the health and safety governor, even if professionally qualified in this area.
- Checking on progress of individual children
- Pursuing a personal agenda
- An opportunity to tackle staff about specific issues not related to the designated role

### **Protocols or ground rules for visits**

- Ensure the visit has a clear focus linked to the school improvement plan and area of governor responsibility.
- Governors individually understand the boards and their delegated area of responsibility, enabling preparation to ensure they provide the challenge and support required.
- Governors to remember that during any visit their role is strategic not operational.
- The Headteacher will liaise with the member of staff responsible for the school/priority/policy objective to arrange the date and the focus of the meeting.
- Staff should have the opportunity to explain the context of any lesson on the rare occasion that a governor visits a classroom
- Governors will not interrupt lessons by asking teachers questions on the rare occasion that they may visit the classroom.
- Governors may 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.
- Governors will ensure that they are familiar with the school's code of conduct as well as that of the Governing board, with expectation that they follow the same behaviours; understand how they will be addressed and how to address others and dress code as outlined within the codes of conducts.
- A breach of the monitoring policy will be dealt with following the process of a breach of the board's code of conduct.
- Governors will formally write reports on their delegated monitoring using the approved templates ensuring that draft reports are sent to the Headteacher for proof reading, accuracy and comments prior to the final report being produced .
- Delegated monitoring reports will be circulated, via the clerk, at the Governing body meeting to enable discussion, triangulation and key questions to be raised and documented to show the impact of the monitoring in replacement of a committee.

### **Annual programme of visits**

A programme of visits (monitoring schedule) should be planned, using the school improvement plan and subsequent approved priority and statutory delegated monitoring governor roles, spread evenly across the school year in consultation with the headteacher. Regular analysis of this schedule enables governors to ensure they are monitoring and triangulating against the

current school priorities, reporting back to the board in replacement of a committee whilst knowing the school in terms of being able to describe to Ofsted or other outside agencies. The number of visits required to be undertaken by each delegated governor role is three in one academic a year, unless the school situation necessitates.

The delegated governor roles (monitoring pairs) should ensure they have visited each school three times a year.

**Examples of delegated governor monitoring visits** in which key questions are asked to the relevant staff lead can also for example include:

- Learning walks with members of staff
- Pupil voice in the class or interviews in groups
- Looking at pupils work against marking policy
- Monitoring implementation of a policy e.g. behaviour, equality
- Gaining an understanding of the broad curriculum, or particular area
- Gaining an understanding of the impact of spend of funding with spending leads
- Ensuring finance monitoring and processes are in place
- Seeing in action 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 resources of the school

**Whole governing body days or general monitoring** in school can for example include

- Visiting break and lunchtimes
- School council
- Parent forum
- Monitoring the culture, ethos and values and for Church schools, the distinctive Christian character is maintained in all that is undertaken.
- Parental engagement at the start or end of school
- Monitoring British values
- Monitoring 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.

Areas we should consider when reviewing are:

- Are our visits achieving the potential benefits we identified? Are we fulfilling our core functions?
- Are our reports containing the challenge appropriate to a committee item?
- Do our discussions at meetings from the reports enable the collectiveness in holding to account achieved by committees?
- Are our visits timely against the school improvement plan?
- Do we have the right governor monitoring roles against the current school priorities?
- Are our delegated governors aware of their responsibilities in replacement of committees? Do we have role descriptors?
- Are we better informed and can evidence the accuracy of Headteacher and SLT reports
- Have there been any unexpected benefits?
- How can we make our practice even better? Is there anything we need to change in how visits are conducted from feedback from staff

# Governor Visits - Good Practice

## Preparing for a visit

- Check the agreed policy and schedule for governors' monitoring visits
- Arrange a mutually convenient time to visit, within the monitoring schedule and governing board meeting window, with the Headteacher.
- Discuss the visit and agreed timetable with the Headteacher to ensure that any member of staff who will be involved in the visit, understands the arrangements.
- Clarify the purpose of the visit as outlined within the monitoring schedule and background preparation reading required. Understand your strategic delegated monitoring role and responsibility. 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? What questions do I want to ask?
- Discuss with the Headteacher/staff lead if any new supporting information is available – Ofsted report, updated improvement plan, note of visit, staff lead report, performance data.
- Ensure that you are familiar with safeguarding and health and safety procedures
- Read the Governing board code of conduct and staff code of conduct to ensure understanding of the behaviours required.

## During the Visit

- Remember you are making the visit on behalf of the governing body; it is not appropriate to make judgements or promises on behalf of the governing body.
- Be punctual, reporting to reception and signing in as a governor. Wear a badge to identify you. 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 you are there to learn, fact find and ask the questions in replacement of a committee, it is a monitoring visit not an inspection.
- Keep to the role agreed; only talk to students if invited/ agreed to do so.
- Observe discretely. Remember that 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.
- Interact, don't interrupt.
- Remember why you are there. Don't lose sight of the purpose of your visit.
- Respect confidentiality
- Meet the Headteacher at the end of the visit and discuss what you have seen, any issues or concerns you may have. Refer to the purpose of the visit. Consider together whether it has been achieved.
- Ensure that you have signed out



## After

- Share any concerns with the Headteacher and Chair, however trivial. Use the opportunity to clarify any issue you are 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. Complete the agreed visit template proforma ensuring that all the questions and answers are captured, with key points to be raised at the next board meeting. (see appendix A).
- Draft the report ensuring Individual children or staff members (other than the member of staff involved with the visit) are not identified in school visit reports.
- Send the draft to the Headteacher and once you have taken their comments into account send the final written report to the clerk for circulation at the next governing board meeting.
- Ensure that your visit is included as an agenda item at the next governing board meeting.
- Reflect: how did that go? Has the visit enhanced relationships? Have I learned more about the school? Have I helped the governing body fulfil its duties by ensuring challenge?

## Informal or outside of delegated role visits

Outside of delegated monitoring to replace committees, visits may also take place to gain stakeholder view or monitor the boards ethos, vision and values. These can take place using the approved formal visits template (Appendix A) or as a governing board day with documented feedback. Visits may also take place in an informal capacity for less formal occasions such as school plays, sports day, and celebration events. 'Discreet' information can be gathered on these visits which build on your knowledge of the school. For informal visits, it is vital that everyone is clear about the capacity in which they are visiting and not to confuse the role. Visiting governors should ensure that they follow the governor visits protocols as appropriate and report using the informal template (Appendix B)

For example, times when governors may be visiting the school **NOT** as a governor to ensure they do not confuse the role.

- To help in a class
- To lend a helping hand with a school event
- To speak to a teacher/ Headteacher in relation to your own child
- Attending a school function, not invited as a governor, or educational visit
- Visit in relation to your position as the local priest or councillor



## Record of a delegated governor's visit to the school - Formal

<b>NAME:</b>	<b>DATE:</b>
<b>DELEGATED GOVERNOR ROLE</b>	
<b>Focus of visit, links with the School Improvement Plan.</b> <i>(How does the visit relate to a priority in the School Improvement Plan?)</i>	
<b>Areas and summary of planned activities. Including departments or areas of school visited, staff and pupils that the governor met during the visit</b> <i>(Previously agreed by the governing body with the Headteacher)</i> <i>(Governors should refer to staff by their role or job title and not by name)</i>	
<b>Observations, comments , questions asked and answers reported to the governor</b> <i>(e.g. what you saw; questions asked with answers and what you learned relating to the focus of the visit; how long the visit lasted)</i>	
<b>Aspects I would like clarified and 3 key questions I would like to raise</b> 1.  2.  3.	
<b>Actions for the governing board to consider</b> <i>(e.g. the way resources are allocated; the way the school communicates; progress in implementing a key policy)</i>	
<b>Signed: Governor</b> <b>Meeting to be considered at:</b>	

## Record of a governor's visit to the school - Informal

<b>NAME:</b>	<b>DATE:</b>
<b>Focus of visit</b> <i>(event, celebration, parents evening, function)</i>	
<b>Observations and comments by the governor</b> <i>(e.g. what you saw; what you learned)</i>	
<b>Any key issues or questions arising for the governing body or leadership team</b> <i>(e.g. the way resources are allocated; the way the school communicates; progress in implementing a key policy)</i>	
<b>Signed: Governor</b> <b>Meeting to be circulated for:</b>	