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Model Governor Visits Policy

Protocol and Procedures for a
Circle Based Governance
Model
2021 - 2022

Approved and adopted by trustees/governors/local
governors/academy committee members:

Preston and Wingham Primary Schools Federation

Date: 31st January 2022

Review Date: January 2024

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, 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.

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

In relation to compliance with statutory and contractual requirements, should be through:

Plans to ensure that key duties are undertaken effectively across the organisation such as safeguarding, inclusion, special education needs and disability (SEND), 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 executive 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 interfering in the day-to-day operational running of the school and the impact too many governor visits may have on the operational school day.

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 pupils using video conferencing. Some areas of focus may be suited to virtual visits, however and for example, it may be more likely that governors will be able to experience school life, culture and ethos during a face-to-face visit. Boards should be mindful, when agreeing the monitoring schedule, of the number of and practicalities of setting up and undertaking both virtual and face to face meetings; the board may need to ensure that it oversees the types of visit (face-to-face, virtual), depending on the needs of the school, staff and governors, when the monitoring schedule is being reviewed and agreed.

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 at least **one** visit a year and no more than **three** visits unless the school circumstances necessitate e.g., if the school category is in the Ofsted category of requires improvement (RI) or inadequate.

There is an expectation that the statutory delegated governors for safeguarding, health & safety, special educational needs and disabilities (SEND), careers guidance (secondary), and finance (KCC maintained

schools) will visit the school three times a year. For finance, there is the additional expectation that the board receives clear and concise monitoring reports of the school's budget position at least six times a year, with monthly reports being provided to the finance lead governor or Chair of Governors see [Section 4 Governors' Guidance notes on the Management of School Finances](#)

In addition, boards may consider it important from a best practice perspective, although not statutory, the addition of delegated/link governors for whole school wellbeing culture and early years.

Understanding of the role of governors in the circle model governance structure

For the circle model, all governor monitoring visits, performed by identified governor skillset/Department for Education (DfE) statutory and delegated governor roles, including circle model monitoring pairs, replace all agenda items, associate work, challenge and support which would otherwise have taken place within committee meetings.

For the board to collectively fulfil its core functions and to ensure constructive challenge to the leadership of the school, the board will need to ensure that an agreed robust policy, procedure and practice is in place for governor delegated monitoring and reporting. Governors' monitoring visits will hold the school to account for its functions, identify areas of strength and weakness, ensure that the reporting of findings increase the board's collective first-hand knowledge and challenge thereby informing self-evaluation, holding the school to account, corroborating necessary collective strategic decision making.

Governors will need to ensure they are asking the questions a committee would have asked during their visits, as well as seeing the school policies and procedures in action. It is a statutory duty in legislation for any delegated function to be documented and reported back to the board at the next meeting after the visit has taken place. Governor written reports will need to contain the questions asked and answers received to enable the board to ensure that challenge and accountability has taken place, enabling follow up digging deeper questions, evidencing collective impact at board meetings.

The board must recognise the essential role of the delegated governor functions in bringing back information to the board at its meetings, to enable collective strategic full governing board decision making. Whilst delegated governors/monitoring pairs will have assigned functions they have **no authority for any decision making. In the circle model, every decision must be made at a board meeting.**

To enable understanding for collective decision making, it is vital the board ensures all governors have a broad understanding of all areas of the governance core functions.

The board should develop a schedule of planned visits over the year, which could include visits resulting from committee meetings, appointing governors with reference to their skillset and to cover the school improvement priorities.

Governor delegated monitoring roles (in addition to the statutory delegated governor monitoring roles listed above) should align to the priorities determined on the School Improvement Plan and against the agreed monitoring visit schedule.

Reporting should be documented and submitted in good time, aligning with the legal requirements of board meeting agendas, so that the strategies, interventions, and impact can be seen in action; board minutes will document and evidence questions and discussion; this enables the impact of the visit to be evidenced and ensures collective understanding at the board meetings:

- Each monitoring visit should have an agreed clear purpose.
- Role descriptors could aid governors in governors' understanding and expectations in carrying out their monitoring visits.

- Whole governing board days in school can also be a valuable tool in knowing your school with a planned focus and feedback.

Governors should arrange their planned visits in advance with the Clerk to the governors who will liaise with senior leaders in the school. The board should review their school visits policy, protocols and procedure annually to ensure its effectiveness with the approved policy circulated to all staff.

To enable understanding and 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, where committees have been replaced by either board meetings or any other governor visit. It does not apply 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.

(For maintained schools) Delegated governors/monitoring pairs in a circle model statutorily do not have any decision-making powers. All decisions in a circle model must take place at a board meeting.

Purpose

All school visits will:

- Have a clear focus, linked to strategic priorities and delegated governor roles, be timely and planned against the board approved monitoring schedule and board meetings.
- Be arranged with adequate notice through the executive headteacher who will agree it 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 ensuring its effectively fulfils its core functions; collectively holds the school to account in replacement of committees, which can be demonstrably evidenced to outside agencies e.g., Ofsted, the Local Authority (LA), diocese; DfE and enables collective understanding for any strategic board decision making.

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 Board 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 Code of Conduct will contain reference to the board monitoring visits policy and subsequent steps for any breach.

Training

Governors should ensure they understand their delegated 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, expectations and preparation for carrying out their monitoring 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.

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 executive Headteacher/head of school immediately or soon after the visit.

The 'Governor Visit Report' will be completed after each visit, containing the questions and answers as would be expected of a committee agenda item as well as questions to be raised at the board meeting. A draft will be shared with the executive headteacher for any comments concerning factual accuracy; any concerns will be discussed with the chair and governor concerned before a final version will be sent to the clerk to be included in the agenda and as a supporting paper for collective discussion and further questioning in the next board meeting.

Confidentiality

Confidentiality should be adhered to regarding visits. Comments should be limited to the executive 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. Staff roles should be used within reports.

Frequency of Visits

Governors, trustees, local board/academy committees/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 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 to governors either within their monitoring role or as whole days:

- To enable the delegated statutory governor roles of safeguarding; health and safety; SEND; careers guidance (secondary); finance (KCC maintained schools) to hold leaders to account and the board collectively fulfilling its statutory duties by demonstrating accountability and constructive challenge.
As a point of best practice Governor Services recommend that Boards also allocate monitoring roles for pupil premium and other target funding.
- 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, its staff, needs, priorities, strengths and weaknesses, and have prevent overreliance of executive headteacher-only information.
- To see in action the impact of specialist funding i.e., pupil premium, sports premium (primary), covid catch up premium.
- 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 a particular policy e.g., safeguarding, behaviour, health and safety, SEND, careers guidance, EYFS.
- Gaining 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 boards ethos, vision and values in action.
- 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, 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 relationships with governors.
- To understand better 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.

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 may face.
- To have mechanisms for enabling the board to listen, understand and respond to the voices of parents / carers, particularly to ensure transparency of decision- making.
- 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 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 delegated statutory governor roles.

Protocols or ground rules for visits

- Ensure the visit has a clear focus linked to the school improvement plan and/or area of governor responsibility.
- Governors individually understand the boards and their delegated area of responsibility, enabling preparation to ensure they provide the constructive challenge required.
- Governors to remember that during any visit their role is strategic not operational.

- Governors to ensure in preparation for their visit they have undertaken relevant training and read any relevant policy or supporting documentation.
- The executive headteacher will liaise with the member of staff responsible for the school/ priority/policy objective to arrange the date and schedule 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 board, with 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 as outlined within both codes of conducts.
- Governors will 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.
- Governors will formally write reports on their visits using the board approved templates ensuring that draft reports are sent to the executive headteacher for factual accuracy comments prior to the final report being produced.
- 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 key questions to be raised; with minute evidence documented to show the impact of the visit.

Annual programme of visits

A programme of delegated governor visits (monitoring schedule), spread evenly across the school year in consultation with the executive headteacher, should be planned using the school priorities, school improvement plan, board and committee meeting timetables and governor roles by skillset. This should be approved alongside the statutory delegated 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 a minimum of once a year and not more than three times a year, unless the school situation necessitates, or they are fulfilling the statutory delegated governor role which requires three visits a year.

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

For multi academy trusts (MATs), even where local level governors/academy committees are in place, it is still important for each school within the trust to receive at least one annual visit from a trustee. As well as providing the MAT board with greater visibility within its schools, school visits will also give trustees valuable insight into the implementation of the MAT wide vision and strategy and provide assurances governance arrangements are effective. As it may not be sustainable in medium to large MAT's for each school to receive termly visits from a trustee, MAT boards should consider the best approach to school visits in order to best utilise trustees' limited time.

Example of governor monitoring visits may 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, safeguarding, finance.
- 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 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.

Whole board days can for example include:

- Visiting break and lunchtimes with staff and pupils
- Pupil voice and their understanding of how they are receiving a quality education
- 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.

Areas we should consider when reviewing are:

- 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?
- Do we have the right governor monitoring roles against the current school priorities?
- Are all governors aware of their responsibilities? Do they understand their role? Do we have role descriptors?
- Are statutory delegated governors appointed to their roles due to skillset? Are they keeping up to date with best practice and latest statutory/ legislative requirements?
- Are we better informed and can evidence the accuracy of Executive Headteacher and SLT reports?
- Have we engaged with stakeholders to understand their views to use as part of informed strategic decision making?
- 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 stakeholders?

Governor Visits - Good Practice

Preparing for a visit

- Check the agreed policy and schedule for governors' monitoring visits and any DfE relevant governance guidance.
- Arrange a mutually convenient time to visit, within the monitoring schedule and board meeting window, with the clerk who will liaise with the executive headteacher.
- Discuss the visit and agreed timetable with the executive 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 undertake any background preparation reading required. Understand your strategic delegated 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? What questions do I want to ask?
- Discuss with the executive headteacher/staff lead if any new supporting information is available, e.g., 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 Board Code of Conduct 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 board; it is not appropriate to make judgements or promises on behalf of the 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 executive 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, ask the questions in replacement of a committee and gain answers, it is a monitoring visit not an inspection.
- 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.
- Interact, don't interrupt and remain strategic.
- Remember why you are there. Don't lose sight of the purpose of your visit.
- Respect confidentiality
- Meet the executive headteacher or head of school at the end of the visit and discuss what you have seen, including 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 executive headteacher and chair, however trivial. Use the opportunity to clarify any issue you are unclear about.

- Thank the staff verbally or by email via the executive Headteacher/Head of school 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.
- Send the draft to the executive headteacher and once you have taken their comments into account send the final written report to the clerk for circulation at the next board meeting.
- Ensure that your visit is included as an agenda item at the next board meeting.
- Complete the agreed visit template proforma in time for the executive headteacher to comment on and sending to the clerk for sending out seven days in advance of the board 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 by ensuring challenge and collective understanding of my delegated area? 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 or outside of delegated role visits

Outside of delegated monitoring, visits may also take place to gain stakeholder view or focussed whole day visits on a specialised area or to monitor the boards ethos, vision and values. These can be documented using the approved formal visits template (appendix A) or as a board day with specific documented feedback. 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)

There will also be times when a governor visits the school, and a report is not required. For example,

- The chair making a regular planned visit to see the executive headteacher
- To get information from the office relating to a meeting
- New governor tour of the school
- Attending working groups or board meetings
- Invited to attend prize giving or celebration events

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 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 delegated governor/part of the monitoring pair for this area/function.

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/senior leaders in relation to your own child
- Attending a school function as a parent/relative/invitee

- Visit 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

Appendix A

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

Name:	Date:
Delegated Governor Role:	
Focus of visit, links with the School Improvement Plan or DfE identified governor role: <i>(How does the visit relate to a priority in the School Improvement Plan or is it in a DfE identified 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 board with the headteacher) (how long the visit lasted?)</i> <i>(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 part 2 and Child Protection policy)</i>	
Comments on 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.</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>	
Three key questions I would like to raise at the board meeting 1. 2. 3.	
Actions for the board to consider or clarifications needed: <i>(e.g., the way resources are allocated; the way the school communicates; progress in implementing a key policy)</i>	
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)</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	