



LEARNING AND GROWING; SAFE IN GOD'S LOVE

Birchington CE Primary School

Governor Monitoring and Visits Policy 2025 - 2026

Approved and adopted by Birchington CE Primary School Governing Body:

Policy Reviewed by the Headteacher & Governors - September 2025

Review Date: - September 2026

Monitoring & Visits Policy Context

The Governing Body 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.

All monitoring, visits, questioning and feedback will be conducted with the words of our Christian Vision and School Values in mind.

The Governance Handbook states on the role of Governor school visits:

'The Governing Body need to know their school's accountability is going to be robust and their vision for the school is to be achieved. The Governing Body 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 Governing Body can see for themselves whether the school is implementing their policies and plans and how they are working in practice. Visits also provide an opportunity to talk with pupils, staff and parents/carers to gather their views.'

'Governors are not inspectors and it is not their role to assess the quality or method of teaching or extent of learning. They should make sure they do not interfere in the day-to-day running of the school. Both are the role of the Headteacher.'

'If the Governing Body wish to spend time within a classroom or with staff, they need to be very clear why they are doing so.'

It also says: 'The Governing Body needs clear processes for overseeing and monitoring school improvement and financial health, providing constructive challenge to Leaders.'

As seen above, visiting the school is not a statutory requirement, though visits play an extremely important role in order to know and learn how it functions, operates and to prevent any over reliance on Headteacher information. Seeing the Governing Body agreed ethos, culture and values in action as well as its strengths and weaknesses, increases the Governing Body's first-hand knowledge and informs Governing Body 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.

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 within their particular role, unless the school circumstances necessitate i.e., school category of RI or inadequate.

There is the expectation that the statutory delegated Governors for Safeguarding; Health & Safety; SEND; Finance will visit/meet with key staff over TEAMS or in person **three** times a year. All visits will be aligned with the monitoring schedule and Governing Body agendas and meetings.

Whole Committee e.g. the Headteacher's Performance Appraisal, Senior Leader/Governing Body strategic planning day whole or half days can also be a valuable tool in knowing your school with a planned focus and feedback.

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 Governing Body Code of Conduct.

This policy sets out the protocol and procedures for a Governor Visit which have been shared with staff. It sets out how Governor Visits should be conducted to allow both Governors and staff to gain the most from the visit and enable evidence of impact.

Governor visits will align to the priorities determined on the School Improvement Plan, against an agreed monitoring visit schedule with reporting recorded in a timely manner within the Governing Body meeting agendas, so that the strategies, interventions and impact can be seen in action.

The Governing Body will develop a schedule of planned visits over the year, which could include visits resulting from committee meetings and appointing Governors with reference to their skillset to cover the school priorities. The monitoring schedule should include provision for the statutory delegated Governor monitoring roles of Safeguarding; Health and Safety; SEND and Finance. Each visit/meeting should be agreed and have a clear purpose. Questions to assist visits aid Governors in their understanding and expectations in carrying out their monitoring visits.

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 Governing Body should review their school Monitoring and Visits Policy, protocols and procedure annually to ensure its effectiveness with the approved policy available to all staff.

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/carers, priests, professional advisers, volunteers or members of staff. The Governor/Chair of Governors and member of staff will consider the needs of the meeting/visit, the length of travel and staff time before deciding if it is necessary to meet face to face or via TEAMS.

Purpose

All school visits will:

- Have a clear focus, linked to strategic priorities and delegated statutory Governor roles, be timely and planned against the Governing Body approved monitoring schedule and Governing Body meetings
- Be arranged with adequate notice through the Headteacher who will agree the visit with the relevant members of staff

- Be of value to the Governing Body in holding the school to account and demonstrably evidenced to outside agencies e.g., Ofsted, the Local Authority, and Diocese

It is not the role of those Governing Body 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 Body's Codes of Conduct and the standards of presentation expected of staff. They will be mindful that they are representing the whole Governing Body through their words and actions. The Governing Body Code of Conduct will contain reference to the Governing Body Monitoring & Visits Policy. A breach of this policy is a breach of the Governor Code of Conduct.

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 aid Governors in their understanding and expectations in carrying out their monitoring visits. Governors to complete a Training Record Form (Appendix B) if relevant.

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 either in person or via her response to their 'Delegated Governor Visit Report'.

The attached 'Delegated Governor Visit Report' will be completed after each visit. This report will contain the visit findings and any questions to be raised with the Headteacher or at a subsequent Governing Body or Committee Meeting.

A draft will be shared with the Headteacher before it is sent to anyone else. She will comment on and/or sign and date the report and sent it to any other members of staff involved in the visit and send it to other key staff, the Chair of Governors and to the clerk to be included in the agenda and as a supporting paper for collective discussion and further constructive strategic questioning at the next Governing Body or committee 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/carers. Individual children or staff members (other than the member of staff involved with the visit) should not be identified in the Governor visit reports.

Frequency of Visits

Each Governor will undertake visits as agreed in their approved monitoring schedule with a minimum of one visit to the school per academic year but no more than three times a year unless the school circumstance necessitates.

Review

This policy, protocol and procedure should be reviewed by the Governing Body every academic year alongside the Governor Code of Conduct. This policy will be circulated to all new Governors upon appointment.

Purposes of a Governor Visits/Meetings with Key Staff

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 and Finance to hold Leaders to account and the Governing Body collectively fulfilling its statutory duties by demonstrating accountability and constructive challenge
- To see the strategies in action as outlined in the School Improvement Plan e.g., meeting with the Leaders/Hub Driver/Subject Leaders regarding an area for improvement, seeing first-hand and learning about the impact of the adopted strategy and how this translates through to school and classroom practice and children's learning
- To improve knowledge of the school, its staff, needs, priorities, strengths, and areas of development and have prevent overreliance of Headteacher only information
- To see in action the impact of specialist funding i.e., Pupil Premium, Sports 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 and SEND
- 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 Body 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/carer 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 Leaders at all stages of their career
- To get to know and build positive relationships with Governors

- To understand *Governors'* knowledge of their roles and responsibilities including the responsibility to work with *Leaders* to address unnecessary teacher workload
- To feel valued and thanked for the effort they put in to the development of the school
- 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 pupils:

- To ensure *Governors* understand the reality of the classroom environment for each child
- To ensure they receive a broad, exciting curriculum and enjoy 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 procedures and policies to the *Governors*

The potential benefits to parents/carers:

- To ensure *Governors* understand the issues that parents and carers may face
- To have mechanisms for enabling the *Governing Body* to listen, understand and respond *Parent/Carer Voice* and ensure transparency of decision- making.
- To get to know *Governors*
- To understand better *Governor* roles and responsibilities
- To give feedback about the school to *Governors*

What a visit is *not* about:

- Visiting classrooms to watch a lesson, unless as part of an accompanied/agreed *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 *Governing Body* 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 Headteacher will liaise with the member of staff responsible for the school/ priority/policy objective to arrange the date and schedule of the meeting - these dates will, in the main be made at the beginning of each academic year between key Governors and staff and be set out on the Governor Visit Planner
- Staff should have the opportunity to explain the context of any lesson on an occasion that a Governor visits a classroom
- Governors will not interrupt lessons by asking staff questions while they are teaching
- Governors may talk to pupils about their understanding and learning journeys during visits, 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 Body
- When visiting the school/attending meetings with staff, Governors will wear suitable clothing in line with the school's dress code
- Governors will formally write reports on their visits using the Governing Body approved templates ensuring that draft reports are sent to the Headteacher for factual accuracy comments prior to the final report being produced
- Monitoring visit reports will be circulated in advance, via the clerk, for either the relevant committee or Governing Body 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 allocated Governor visits (monitoring schedule), spread evenly across the school year in consultation with the Headteacher, will be planned using the school priorities, School Plan, Governing Body 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 Governing Body as appropriate. This enables the Governing Body to know the school in terms of being able to evidence this to Ofsted or other outside agencies and demonstrate constructive challenge and impact.

Example of Governor Monitoring Visits may include:

- Monitoring the impact of the school's work regarding our Christian Vision and our School or British Values
- Learning Walks with members of staff
- Pupil Voice in the class or interviews in groups
- Looking at pupils' work against set policies
- Monitoring implementation of a policy e.g., Behaviour, Safeguarding, Finance
- Gaining an understanding of the curriculum
- 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
- Visiting break and lunchtimes or staff meetings with staff and pupils
- Hearing Pupil Voice and their understanding of how they are receiving a quality education
- Junior Leadership Teams
- Headteacher Performance Appraisal
- Gaining an understanding of the impact of spend of funding with school Leaders
- Monitoring the Governing Body culture, ethos and values and for Church schools, ensuring the distinctive Christian character is maintained against agreed expectations
- Parent/carer engagement at the start; end or during parent/carer events in school
- Monitoring the preparation for the next stage of education

Monitoring and Review of School Monitoring and Visit Policy

The policy should be monitored and reviewed annually alongside the Governor 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 a committee or Governing Body meetings?
- Do our Governing Body 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 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 Headteacher and school staff 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
- Arrange/confirming a mutually convenient time to visit, within the monitoring schedule and Governing Body meeting windows, with the member of staff copying in the Headteacher (the arranged date is normally already on The Governor Visit Planner)
- Discuss the visit and agreed timetable with the Headteacher (unless previously known because the arranged date is already on The Governor Visit Planner/discussed in a Governing Body Meeting)

- Ensure that you and 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 and background preparation. Understand your strategic monitoring role
- Review the milestones and action points in the School 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? Are you holding Leaders to account for pupil, subject, phase, school progress?
- Discuss with the staff lead/Headteacher if any new supporting information is available, e.g., Ofsted Report, updated plans, performance data, a specific policy
- Ensure that you are familiar with Safeguarding and Health & Safety procedures
- Read the Governing Body 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 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 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 if needed.
- Be courteous and professional throughout the visit, friendly not critical, including thanking members of staff before leaving.
- Remember you are there to learn and see the information you have been told is happening with your own eyes. It is a visit not an inspection.
- Keep to the role agreed.
- Watch discretely. Depending on the context of the visit, excessive note taking can be disconcerting and may make your visit look like an inspection.
- Interact, don't interrupt.
- Remember why you are there. Don't lose sight of the purpose of your visit.
- Respect confidentiality.
- Where possible, meet the Headteacher or another Senior Leader at the end of the visit and discuss what you have seen, including any issues or concerns you may have (if this has been arranged). Refer to the purpose of the visit. Consider together whether it has been achieved. If a meeting is not possible an email or phone conversation can take place or a question can be raised via the Governor visit form.
- Ensure you have signed out.

After the Visit

- Share any concerns with the Headteacher and Chair. 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/visit while it is still fresh in your mind. Complete the agreed visit template proforma (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
- Send the draft to the Headteacher and she will respond, either adding clarification in blue print of answering any questions you may have. She will then distribute the final written report to the other Governors, the Clerk and the staff who have been involved in the visit.
- Complete the agreed visit template proforma in time for the Headteacher to comment on or answer queries/questions in advance of the next Governing Body meeting. Ensure that all the questions and answers are captured for the delegated statutory roles and for all key questions are added following evaluation of the visit to be raised at the next Governing Body or Committee meeting. (See Appendix A).
- Ensure that your visit is included as an item under Governor Visits at the next appropriate Committee or Full Governing Body meeting
- Reflect: How did that go? Has the visit enhanced relationships? Have I learned more about the school? Have I helped the Governing Body collectively fulfil its duties with constructive challenge and holding to Leaders to account? Are there actions the Governing Body will want to complete at the next visit to follow up any areas/focus on following discussion with staff? Do I need to undertake training to increase my skillset to fulfil the monitoring role even more effectively? How has this visit had impact on the understanding of other Governors?

Informal or Outside of Delegated Role Visits

Outside of delegated and scheduled monitoring visits may also take place to gain stakeholder view, focus whole day visits on a specialised area or monitor the Governing Body ethos, Christian Vision and Christian and School Values. These can be documented using the approved formal visits template (Appendix A).

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 Governing Body.

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 Headteacher
- To get information from the office relating to a Committee or Governing Body meeting
- New Governor tour of the school
- Attending working groups, Committee or Governing Body meetings
- Invited to attend prize giving or celebration events

Although it is good practice to record these visits as evidence as a Governor's role in the full life of the school, the Chair of Governors will usually write the report for this type of event if she is present.

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.

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 your own child
- Attending a school function or educational visit 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 etc.



Appendix A

Record of a Governor's Monitoring & Visit to the School - 2024 - 2025

NAME:	DATE:
GOVERNOR ROLE:	
Focus of visit & Links with the School Plan <i>(How does the visit relate to a priority in the School Improvement Plan?)</i>	
Areas and summary of planned activities. Including departments or areas of school visited, staff and pupils that the Governor/s met during the visit. <i>(Previously agreed by the Governing Body, with the headteacher or subject leads. How long did the visit last? 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.</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>	
Evidence of our Christian Vision and School Values in Action	
Comments on Safeguarding culture observed during visit <i>(e.g., in relation to KCSIE and Child Protection policy)</i>	

Three key questions I would like to raise at the Governing Body meeting

- 1.
- 2.
- 3.

Actions for the Governing Body to consider

Impact of the visit and follow up next visit planned focus

Signed: Governor

Date:

Signed: Headteacher

Date:



Appendix B

Birchington CE Primary School

Governor's Training Record

Governor		Date	
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Purpose of training	
Link to School Plan	
Governor Learning Points <i>(delete/add to as appropriate)</i>	<p>How will this help you to:</p> <ul style="list-style-type: none"> • Understand your role and carry it out effectively • Undertake purposeful visits to the school • Perform link roles effectively • Ensure the school has a clear vision, ethos, and strategic direction • Ensure resources are well managed • Hold executive leaders (the headteacher or CEO, for example) to account for educational performance and the performance management of staff • Oversee the financial performance of the school, and ensure money is well spent (including the pupil premium) • Hold leaders to account for the quality of education or training • Ensure the provider fulfils its statutory duties (like the ones placed on school by the Equality Act 2010, the 'Prevent' strategy or Keeping Children Safe in Education) • Promote the welfare of learners • Ensure that the education the school provides has a positive impact on all its pupils
Questions to consider	

Any Potential Issues Arising for Governing Body	
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