



## HILDENBOROUGH CHURCH OF ENGLAND PRIMARY SCHOOL

"I can do all things through Christ who strengthens me," (Philippians 4:13) so that I can be the best that I can be, for myself, for others and for God.

# GOVERNOR VISITS AND PROCEDURES POLICY

October 202~~3~~<sup>2</sup>

We aspire for our community to flourish as we journey together to fulfil our God given potential by encouraging a delight in the pursuit of wisdom and knowledge. We cherish each person as unique and special, and celebrate God's creation through providing rich experiences, which enlighten, challenge, shape and enhance life's opportunities for all.

Last Reviewed	October 202 <del>4</del> <sup>1</sup>
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## Policy context

1. 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.
2. The Department for Education’s (DfE) Governance Handbook (2019)<sup>1</sup> states on the role of governor school visits:

*Boards need to know their school if accountability is going to be robust and their vision for the school is to be achieved. Many boards find that visiting their school, particularly during the day, is a helpful way to find out more about the school, its staff and students. Through pre-arranged visits that have a clear focus, the board can see for themselves whether the school is implementing their policies and improvement plans and how they are working in practice. Visits also provide an opportunity to talk with pupils, staff and parents to gather their views, though are unlikely to be sufficient for these purposes.*

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

### It also says

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

### And in relation to compliance with statutory and contractual requirements, including 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.*

3. Within the circle model, governor monitoring visits, performed by delegated governors, are intended to provide challenge and support. Therefore, for the governing body, collectively, to be able to fulfil its core functions, it will need to ensure a robust policy, procedure and practice for governor delegated monitoring is in place to enable constructive challenge to the leadership of the school. These visits will hold the school to account for its functions and areas of strengths and weaknesses. The reporting back of the findings will increase the board’s collective first-hand challenge and knowledge, informing self-evaluation, holding to account and any necessary collective strategic decision making. Governors will need to ensure they are asking appropriate questions 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 written up and reported back to the next board 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 the challenge and accountability has taken place and to enable follow up questions for evidence of deeper questioning and collective impact at governing body meetings.
4. Governor delegated monitoring roles should align to the priorities determined on the School Improvement Plan (SIP), with an agreed monitoring visit schedule that is timely to the school and governing body meetings and reported back, with board minutes evidencing documented questions and discussion. This enables the impact of the visit to be measured and ensures collective understanding at the board meeting. The monitoring schedule should also offer provision for the DfE

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identified governor monitoring roles of safeguarding; SEND; career guidance (secondary); and the Kent County Council (KCC) maintained schools identified health and safety and finance roles. Each monitoring visit should have an agreed clear purpose.

5. The governing body must recognise the role of the delegated governor functions in bringing back the information to the board at its meetings to enable any collective strategic decision making. Whilst delegated governors/monitoring pairs have an assigned function they have no authority for any decision making – decisions must be made at a governing body meeting. To enable understanding for collective decision making, it is vital that the governing body ensures all governors have a broad understanding of all areas of the governance core functions.

## Introduction

6. This policy sets out the protocol and procedures for all governor visits. It has been shared with all school governors and 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. **A breach of this policy is a breach of the Code of Conduct.**
7. This policy applies to school visits made for the purpose of governance. 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.
8. Hildenborough Church of England primary school’s governing body works as a ‘whole team’, meeting 6 times per year; spread evenly across the year, without any separate regular committees except for finance. In addition to these meetings, we have an annual Governor Day, where all of the governors together visit school for the duration of a school day, organised to effectively observe, scrutinise, challenge and support a range of school activities and personnel. As a governing body, we delegate monitoring activities, either statutory functions or priorities of the School Plan, to specific governors or ‘monitoring pairs’. Further details on specific governor roles can be found in our Governing Body Procedures document.
9. This monitoring visit policy should be read in conjunction with the following documents:
  - Hildenborough CE Primary School Governing Body Procedures, which includes:
    - Terms of Reference for individuals or monitoring pairs
    - Standing orders – working practices of the governing body
    - Code of Conduct for governors
    - Protocol for making a governor visit
  - School Development Plan (SDP)

## Purpose of governor visits

10. All governor visits should:
  - Have a clear focus, linked to strategic priorities, the SIP and designated governor roles. Governors should individually understand their delegated area(s) of responsibility and ensure that they are adequately prepared for visits to ensure they provide the constructive challenge required. In

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preparation for their visit, governors should ensure they have undertaken relevant training and read any relevant policy or supporting documentation.

- Be timely, planned and on the approved monitoring visits schedule where possible. The monitoring schedule should also be shared with all staff. Visits should be arranged with adequate notice through the Headteacher who will agree it with the relevant member(s) of staff.
- Have a written report to evidence the visit, as well as enable further scrutiny, challenge and strategic decision making by the governing body. Visits should be of value to the governing body in ensuring it effectively fulfils its core functions and collectively holds the school to account; and that this can be demonstrably evidenced to outside agencies e.g. Ofsted, the Local Authority (LA), diocese, DfE.

11. A governor visit is not about:

- Visiting classrooms to observe a lesson, unless as part of an accompanied learning walk against a specific focused 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. 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. **It is not the role of governors to form judgements about the performance of school staff during visits and individuals should make every effort to avoid this impression.**
- On the rare occasion that a governor visits a classroom, governors should not interrupt lessons by asking teachers questions. Staff should also have the opportunity to explain the context of any lesson.
- Undertaking a staff operational role e.g. touring the school undertaking health and safety checks as the health and safety governor, even if professionally qualified in this area. Governors should remember that their role is strategic not operational.
- An opportunity to tackle staff about specific issues not related to the delegated role.
- Checking on progress or receiving information of individual children.
- Pursuing a personal agenda.

12. There are a range of potential benefits to governors, staff, students and parents from undertaking potential benefits. Some of these are outlined below.

***Benefits of visits to governors within their individual delegated monitoring roles***

- To assist the governing body, including the DfE identified delegated governor roles of safeguarding; SEND; for KCC maintained schools, health and safety; finance to hold leaders to account within their delegated area of responsibility.
- To assist the governing body in fulfilling its statutory duties by written reports demonstrating accountability and constructive challenge in their delegated role, in replacement of committees. The reports are used by the board for collective evaluation, further scrutiny and deeper challenge at their meetings and may aid any board strategic decision making.
- 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, questioning and learning about the impact of the adopted strategy 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 the governor delegated area of responsibility and collectively prevent overreliance of headteacher information.

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- To hold the school leaders to account for the impact of specialist funding i.e. pupil premium; sports premium (primary), COVID-19 catch up premium within the relevant delegated governor role.
- 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 collective strategic decision making.
- To observe and monitor the impact of policies in action e.g. safeguarding, behaviour, health and safety, SEND, careers guidance, finance.

### ***Benefits of visits to governors within general monitoring***

(For example, whole governing body days)

- 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's approved 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.

### ***Potential benefits of visits 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.
- 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 resources.

### ***Potential benefits of visits to students***

- To ensure governors understand the reality of the classroom environment, broad curriculum, and school life.
- To have mechanisms for enabling the governing body to listen, understand and respond to the voices of pupils, 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 and their views of the impact of policies to the governors.

### ***Potential benefits of visits to parents***

- To ensure governors understand the issues that parents may have.
- To have mechanisms for enabling the governing body 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.

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### **Timeliness and frequency of visits**

13. An annual programme of visits (monitoring schedule) should be planned and approved, using the SIP, governing body meeting timetable and allocation of monitoring governor roles. This programme should be spread evenly across the school year in consultation with the headteacher. 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 governing body. This enables the governing body to fulfil its collective core roles and functions by evidencing constructive challenge and impact and enabling strategic decision making; and know the school in terms of being able to describe to Ofsted or other outside agencies.
14. It is recognised that the amount of time that a governor can commit to a visit will vary and governors will undertake visits as agreed in the approved monitoring schedule. It is expected that a minimum of 3 monitoring visits will be made to the school during the year. Other forms of communication such as telephone calls, emails etc. may be substituted for one or more visits if appropriate. A visit does not necessarily have to take place during the time when pupils are in school, and could be just as effective as a meeting between governor(s) and the lead professional at the end of the day as mutually agreed. Care should be taken to not over-burden staff with unnecessary visits as this might impact upon the operational school day.
15. Alongside delegated monitoring, whole governing body days may also be an additional valuable tool in knowing the school. In addition to individual visits, Governors at Hildenborough CE Primary School hold one annual visit day where they visit the school as a whole governing body.

### **Types of visit**

#### ***Delegated governor monitoring visits***

16. Delegated governor monitoring visits or monitoring pairs visits are visits in which key questions are asked to the headteacher or relevant staff lead. These could, for example, include:
  - Learning walks with members of staff
  - Pupil voice in the class or interviews in groups
  - Looking at pupils’ work against the marking or curriculum policy’s
  - Monitoring implementation of a policy e.g. behaviour, equality, safeguarding, finance
  - Gaining an understanding of the broad curriculum, or area
  - Gaining an understanding of the impact of spend of funding, including specialist funding, with spending leads
  - Ensuring financial compliance, 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***

17. Such visits 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

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- Parent forum
- Seeing extra-curricular provision in action
- Evidencing collectively the safeguarding culture
- Monitoring the 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 preparation for the next stage of education

### *Informal governor visits*

18. 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 report using the informal template (see *Annex B*).

19. There will also be times when a governor visits the school as a school governor 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 meeting
- New governor tour of the school
- Attending working groups or governing body meetings
- Invites to attend prize giving or celebration events

### *Areas not considered a governor monitoring visit*

20. 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 an advisory or operational role within the school as an individual or professional, **the role/function must be declared on the register of business interests and at governing body meetings.**

Examples of times when governors may be visiting the school **not** as a governor include:

- 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 as a parent/relative
- 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.

### **Governor conduct**

21. Governors undertaking visits must comply with the school and governing body’s Codes of Conduct, any DfE guidance and the standards of presentation expected of staff. Governors should ensure that they are familiar with the school and governing body’s code of conducts, with the expectation that they follow the same behaviours. This includes understanding how they will be addressed and how to address others and appropriate dress code.



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- 22. Governors on visits should be mindful that they are representing the whole governing body through their words and actions. They should be mindful of their strategic role by not becoming operational.
- 23. **A breach of the governor monitoring visit policy will be dealt with as a breach of the governing body’s code of conduct.** The governing body’s code of conduct contains reference to this policy and subsequent steps for any breach.

### Training

- 24. 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.
- 25. All governors need to ensure they have a broad understanding of all areas of delegated governance and undertake training where necessary.

### Governor reports following a visit

- 26. It is a statutory responsibility for any delegated function to be reported back to the governing body. Any individual 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.
- 27. Governors undertaking their visits will have the opportunity to discuss the visit, including any concerns, with the Headteacher immediately or soon after the visit.
- 28. Governors should complete a report using the attached, approved ‘Governor Visit Report’ template (see Annex A) after each visit. This contains the questions and answers that would be expected of a committee agenda item as well as any questions to be raised at the governing body meeting.
- 29. A draft of the report should be shared with the Headteacher, and any other relevant staff involved in the visit, for checking factual accuracy prior to the final report being produced. Drafts should be submitted to the Headteacher within 2 weeks of the visit. When the report has been agreed, a final version should be sent to the Clerk to be included in the agenda as a paper for collective discussion and further questioning at the next governing body meeting. Where possible, reports should be sent to the Clerk no less than 7 days in advance of the meeting.

### Confidentiality

- 30. 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. Staff roles should be used within reports.



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## Review

31. To ensure its effectiveness, the governing body should review this policy annually, alongside its Code of Conduct. The approved policy should be circulated to all staff and governors and circulated to all new governors upon appointment.
32. In reviewing the policy, issues to be considered include, but are not limited to:
- Are our visits achieving the potential benefits we identified? Are we fulfilling our core functions?
  - Are we receiving the individual reports containing the challenge and answers appropriate to item minutes?
  - Do our discussions at meetings from the reports enable us in holding to account and is this evidenced in minutes?
  - Are our visits timely against the school improvement plan and governing body meetings?
  - Do we have the right governor monitoring roles against the current school priorities?
  - Are governors keeping up to date with best practice and latest statutory/legislative requirements?
  - Are we better informed and can evidence the accuracy of headteacher and SLT reports?
  - Have we engaged 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?

## Useful Resources

- [DfE Governance Handbook \(October 2020\)](#)
- NGA Knowing your school: school visits: holding your school to account
- [The Key for School Governors – Governor visits: your how-to guide \(November 2020\)](#)
- NGA Website
- GovernorHub
- The Education People

Approved and adopted by the governing body on:

Signed by:

Chair of Governors

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### **Governor visits - good practice guide and checklist**

#### **Preparing for a visit**

1. Check the agreed policy and schedule for governors’ monitoring visits and any DfE relevant governance guidance.
2. Arrange a mutually convenient time to meet, within the monitoring schedule and governing body meeting window, with the headteacher.
3. 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.
4. Clarify the purpose of the visit as outlined within the monitoring schedule and undertake any background preparation reading required. Understand your strategic monitoring role and responsibility including completing relevant training.
5. Review the milestones and action points in the SIP? What are the relevant school policies associated to this area? What questions do I want to ask?
6. Discuss with the 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.
7. Ensure that you are familiar with safeguarding and health and safety procedures.
8. Read the Governing Body Code of Conduct and Staff Code of Conduct to ensure understanding of the professional behaviours required.

#### **During the visit**

9. Remember you are making the visit on behalf of the board; it is not appropriate to make judgements or promises on behalf of the governing body.
10. 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.
11. Decide with the headteacher how you will be introduced and how you will address staff and pupils
12. Be courteous and professional throughout the visit, friendly not critical, including thanking members of staff before leaving.
13. Remember you are there to learn. It is a monitoring visit not an inspection.
14. Keep to the role/focus agreed; only talk to students if invited / agreed to do so.
15. 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.
16. Interact, don’t interrupt and remain strategic.
17. Remember why you are there. Don’t lose sight of the purpose of your visit.
18. Respect confidentiality.
19. Where possible, meet the headteacher at the end of the visit and discuss what you have seen, including any issues or concerns you may have. Refer to the purpose of the visit. Consider together whether it has been achieved.
20. Ensure that you have signed out.

#### **After the visit**

21. Share any concerns with the headteacher and chair, however trivial. Use the opportunity to clarify any issue you are unclear about.
22. Thank the staff by email directly for contributing to the success of the visit and for supporting you in your role as a governor. Be open, honest, and positive.

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23. 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 (see *Annex A*).
24. 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.
25. 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 body meeting (reports should be sent to the Clerk no less than 7 days in advance of the meeting).
26. Ensure that your visit is included as an agenda item at the next board meeting.
27. 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? Are there actions the governing body 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?

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### **Annex A: Record of governor 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 or DfE identified governor role:</b> <i>(How does the visit relate to a priority in the SIP or is it in a DfE identified governor delegated role?)</i>	
<b>Before visit – key questions to consider</b>	
<b>Areas and summary of planned activities, including 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) (how long the visit lasted)</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 given; what you learned relating to the focus of the visit)</i> <b>ensure this section contains the constructive challenge and accountability against the required governance statutory responsibilities and functions. See Governance handbook.</b>	
<b>Comments on safeguarding culture observed during visit</b> <i>(e.g. in relation to KCSIE part 2 and Child Protection policy)</i>	
<b>Key questions I would like clarified or to raise at the governing body meeting:</b> <div style="margin-left: 20px;"> 1.   2.   3. </div>	
<b>Actions for the governing body to consider or clarifications needed:</b> <i>(e.g. the way resources are allocated; the way the school communicates; progress in implementing a key policy)</i>	
<b>Impact of the visit and follow up next visit planned focus:</b>	
<b>Signed:</b> Governor  <b>Shared with:</b>  <b>Meeting to be considered at:</b>	

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**Annex B: Record of governor 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, behavior, stakeholder interaction/engagement, safeguarding)</i>	
<b>How will this report be considered at the board meeting?</b> <i>(Verbal feedback, raised as a question, raised as part of triangulation)</i>	
<b>Signed:</b> Governor	