



# **MAST**

## **Local Governing Body**

### **Monitoring Visits Policy**

**Protocol and Procedures**  
**2025-26**

**Approved and adopted by Trust Board**

**Name of School:**

**Date: 23 September 2025**

**Review Date: September 2026**

## Policy Context

The board has a statutory duty to oversee the policies and direction of the Trust delegating to its local governing body's (LGB) 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 headteacher information. Seeing the trust board and school agreed ethos, culture and values in action as well as its strengths and weaknesses, increases the LGB's first-hand knowledge and informs LGB self-evaluation against its 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.

### **Understanding of the role of governors**

For the model of LGB, governor monitoring supports challenge.

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

It is a statutory duty in legislation for any delegated function to be documented and reported back to the LGB at the next meeting after the visit has taken place. **Governor written reports will need to include 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 LGB meetings.**

**The LGB must recognise** the essential role of the delegated governor functions reporting to the board at its meetings, to enable collective strategic challenge and support.

**To enable collective understanding, it is vital the LGB ensures all governors have a broad understanding of all areas of the delegated governance functions.**

**Local Governor delegated monitoring roles**, in addition to the statutory delegated local governor monitoring roles, should align to the priorities determined on the School Improvement Plan and against any agreed monitoring visit schedule.

**The LGB should develop** a schedule of planned visits over the year appointing governors with reference to their skillset and to cover the school improvement priorities.

### **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 it is important that local governors are to experience school life, culture and ethos during a face-to-face visit. LGB's should be mindful of the workload and wellbeing of staff when agreeing the monitoring schedule, including timing, number of visits and practicalities of setting up and undertaking both virtual and face to face meetings.

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 two visits per year unless the school circumstances necessitate.

There is an expectation that the statutory delegated governors for safeguarding, special educational needs and disabilities (SEND) and health & safety will visit the school three times a year.

**Reporting** should be documented and submitted in good time, aligning with the legal requirements of LGB meeting agendas, so that the strategies, interventions, and impact can be seen in action; LGB 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 LGB board days in school can also be a valuable tool in knowing your school with a planned focus and feedback.

**Local 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 LGB should review their school visits policy, protocols and procedure annually to ensure its effectiveness with the approved policy circulated to all staff.

**If governors cannot undertake this commitment, they should question whether they can make a realistic and valuable contribution as a local governor in line with the trust board's agreed Code of Conduct.**

## **Local 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. 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.

### **Purpose**

All school visits will:

- Have a clear focus, linked to strategic priorities and delegated local governor roles, be timely and planned against the LGB monitoring schedule and LGB meetings.
- Be arranged with adequate notice through the 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 by the LGB.

- Be of value to the board in ensuring its effectively fulfils its delegated functions; collectively holds the school to account which can be demonstrably evidenced to the trust board and outside agencies e.g., Ofsted, the diocese; DfE and enables collective understanding.

*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.*

### **Local Governor Conduct**

Local Governors undertaking visits will comply with the School and Trust Board Codes of Conduct, any DfE guidance and the standards of presentation expected of staff. They will be mindful that they are representing the LGB through their words and actions and will understand their strategic role by not becoming operational. The Trust Board Code of Conduct will contain reference to the LGB monitoring visits policy and subsequent steps for any breach.

### **Training**

Local 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 local governors in their understanding, expectations and preparation for carrying out their monitoring visits.

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

### **Local Governor reports following visit**

It is a statutory responsibility for any delegated function to be reported back to the Board.

Local Governors undertaking their visits will have the opportunity to discuss the visit, including any concerns, with the headteacher immediately or soon after the visit.

The attached Delegated Local Governor Visit Report Template will be completed after each visit, containing the questions and answers asked as well as questions to be raised at the board meeting. A draft will be shared with the headteacher for any comments concerning factual accuracy; any concerns will be discussed with the LGB chair and local governor concerned before a final version will be sent to the governance professional to be included in the agenda and as a supporting paper for collective discussion and further questioning in the next LGB meeting.

### **Confidentiality**

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

### **Frequency of Visits**

Local Governors will undertake visits as agreed in their approved monitoring schedule.

### **This Policy will be circulated to all new local governors upon appointment**

### **Purposes of a local governor visit**

The benefits to local governors either within their monitoring role or as whole days:

- To enable the delegated statutory local governor roles of safeguarding; SEND; Filtering & Monitoring and health & safety to hold leaders to account and the LGB 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 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 headteacher-only information.

- To see in action the impact of specialist funding i.e., pupil premium, sports premium, recovery premium.
- 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 policies e.g., safeguarding, behaviour, health and safety, SEND, careers guidance.
- 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 trust boards and schools 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 local 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 local governors.
- To understand better the delegated local governors' roles and responsibilities including the responsibility to work with headteachers 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 local governors understand the reality of the classroom environment, broad curriculum and school life.
- To get to know local governors.
- To understand better local governor roles and responsibilities.
- To give feedback about the school and their views of the impact of policies to the local governors.

#### The potential benefits to parents:

- To ensure local governors understand the issues that parents may face.
- To have mechanisms for enabling the LGB to listen, understand and respond to the voices of parents / carers, particularly to ensure transparency of decision-making.
- To get to know local governors.
- To understand better local governor roles and responsibilities.
- To give feedback about the school to the local 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 local governor roles.
- An opportunity to take on individual parental issues not related to the strategic local governor role.

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

- Ensure the visit has a clear focus linked to the school improvement plan and/or area of local governor responsibility.
- Local Governors individually understand the boards and their delegated area of responsibility, enabling preparation to ensure they provide the constructive challenge required.
- **Local Governors to remember that during any visit their role is strategic not operational.**
- Local 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.
- Staff should have the opportunity to explain the context of any lesson on the rare occasion that a local governor visits a classroom
- Local Governors will not interrupt lessons by asking teachers questions on the rare occasion that they may visit the classroom.
- Local 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.
- Local Governors will ensure that they abide by the trust board agreed school's code of conduct as well as that of the trust 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.
- Local Governors will have a clear understanding that a breach of the local governor monitoring visit policy will be dealt with as a breach of the board's code of conduct.
- Local Governors will formally write reports on their visits using the 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 of the LGB meeting, via the governance professional, 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 local governor visits (monitoring schedule), spread evenly across the school year in consultation with the headteacher, should be planned using the school priorities, school improvement plan, board and monitoring pairs meeting timetables and local governor roles by skillset. This should be approved alongside the statutory delegated and agreed best practice monitoring local governor roles. Regular analysis of this schedule enables local governors to ensure they are monitoring, evaluating and triangulating against the current school priorities and statutory areas and reporting back to the board as appropriate. This enables the LGB 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 local governor should be as stated in the terms of reference, code of conduct and agreed in this policy, unless the school situation necessitates additional visits, or they are fulfilling the statutory delegated governor role which requires three visits a year.

## **Example of local 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.
- Gaining an understanding of the broad curriculum, or particular area.
- Seeing in action the impact of specialist funding
- 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 LGB 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
- Monitoring implementation of policies e.g., behaviour, equality, safeguarding
- School council
- Parent forum
- Gaining an understanding of the impact of spend of funding with spending leads
- Monitoring the trust boards and schools 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 and terms of reference.

Areas to consider when reviewing are:

- Are our visits achieving the potential benefits we identified? Are we fulfilling our delegated functions?
- Are our individual reports having impact within the board meetings?
- Do our LGB discussions from the local 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 local governor monitoring roles against the current school priorities?
- Are all local governors aware of their responsibilities? Do they understand their role? Do we have role descriptors?
- Are statutory delegated local 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 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?

## Local Governor Visits - Good Practice

### Preparing for a visit

- Check the agreed policy and schedule for local governors' monitoring visits and any DfE relevant governance guidance.
- Arrange a mutually convenient time to visit, within the monitoring schedule and LGB meeting window, with the headteacher.
- Discuss the visit and agreed timetable with the headteacher to ensure that any member of staff who will be involved in the visit, understands the arrangements.
- Clarify the purpose of the visit as outlined within the monitoring schedule and 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 headteacher/staff lead if any new supporting information is available, e.g., Ofsted report, updated improvement plan, staff lead report, performance data.
- Ensure that you are familiar with safeguarding and health and safety procedures
- Read the Trust Board Code of Conduct and Staff Code of Conduct to ensure understanding of the professional behaviours and dress code required.

### During the Visit

- Remember you are making the visit on behalf of the LGB; it is not appropriate to make judgements or promises on behalf of the LGB.
- Be punctual, reporting to reception and signing in as a local governor. Wear a badge to identify yourself as a local 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
- 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 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 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.
- Ensure that you have signed out

### After

- Share any concerns with the headteacher and chair, however trivial. Use the opportunity to clarify any issue you are unclear about.
- Thank the staff by email via the headteacher for contributing to the success of the visit and for supporting you in your role as a local 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.

- Ensure that your visit is included as an agenda item at the next LGB meeting.
- Complete the agreed visit template proforma and send the draft to the headteacher for fact checking and comment, ensuring timescales are met in sending to the clerk for onward distribution at least seven days in advance of the LGB 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 LGB collectively fulfil its delegated duties by ensuring challenge and collective understanding of my delegated area? Are there actions the LGB 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 visits**

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 local governors should ensure that they follow the governor visits protocols as appropriate and consider how they will feedback to the LGB.

### **Areas not considered as a local 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 local governor undertakes as an individual/professional in an advisory or operational role within the school, **the role/function must be declared on the register of business interests and at LGB meetings;** and they **must not be appointed** as the delegated local governor/part of the monitoring pair for this area/function. Key consideration must be undertaken for the suitability of any delegated in school link/monitoring role allocated to the local governors who are members of staff.

For example, times when local governors may be visiting the school **not** as a local 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 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 any areas, amending/devising the school website etc

## Record of a Delegated Local Governor's Visit to the School - Formal

<b>Name:</b>	<b>Date:</b>
<b>Delegated Local Governor Role:</b>	
<b>Focus of visit, links with the School Improvement Plan or DfE identified local governor role:</b> <i>(How does the visit relate to a priority in the School Improvement Plan or is it in a DfE identified local governor delegated role?)</i>	
<b>Areas and summary of planned activities. Including departments or areas of school visited, staff and pupils that the governor met during the visit</b> <i>(Previously agreed by the board with the headteacher) (how long the visit lasted?)</i> <i>(Local Governors should refer to staff by their role or job title and not by name)</i>	
<b>Observations and comments by the local governor</b> <i>(e.g., what you saw; questions asked with answers given; what you learned relating to the focus of the visit). <b>Ensure this section contains the constructive challenge and accountability against the required governance statutory responsibilities and functions.</b> See Governance handbook.</i>	
<b>Comments on Safeguarding culture observed during visit</b> <i>(e.g., in relation to KCSIE and Child Protection policy)</i>	
<b>Comments on SEND culture observed during visit</b> <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>	
<b>Comments on whole school wellbeing during visit</b> <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>	
<b>Evidence of the Vision in action within the school</b> <i>(e.g., the way the school communicates the vision; progress in implementing the vision across the curriculum)</i>	
<b>Three key questions I would like to raise at the LGB meeting</b> 1. 2. 3.	
<b>Actions for the LGB 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: Local Governor</b> <b>Meeting to be considered at:</b>	

