



# Local Governor Monitoring Policy

<b>Date Agreed:</b>	<b>April 2025</b>
<b>Review Date:</b>	<b>April 2027</b>
<b>Type of Policy:</b>	<b>DCAT Policy</b>

Revision Number	Date Issued	Prepared by	Approved	Personalised by school	Comments
1	Feb 2021	JS	✓		Policy written to include the need for virtual monitoring – reviewed by Chairs and Headteachers
2	Feb 2023	JS	✓		Amendments to include the need for formal written reports and a template for annual schedule of monitoring visits added
3	April 2025	JS / DG	ESSC		Reviewed by Chairs Hub and circulated via Need 2 Know. Added section 2.3

Type of Policy	Tick ✓
DCAT Statutory Policy	
DCAT Non-statutory Policy	✓
DCAT Model Optional Policy	
School Policy	

## Contents

Introduction .....	2
1. Policy Aims .....	3
2. Guidance and scope.....	3
2.1 Local Governors are observers.....	3
2.2 Local Governors are not inspectors .....	3
2.3 Local Governors.....	3
3. School or Virtual Monitoring visits .....	4
3.1 Formal Monitoring Visits in School.....	4
3.2 Virtual Monitoring Visits.....	4
3.3 Informal Monitoring Visits .....	4
4. Monitoring Visits programme .....	4
5. Before a visit.....	5
6. During a visit .....	5
7. After a visit .....	5
Appendix 1: Template report for a monitoring visit.....	6
Appendix 2: Template report for a learning walk .....	8
Appendix 3: Template annual schedule of monitoring visits.....	12

## Introduction

Our **vision** for our Trust is we exist to:

***Help every child achieve their God-given potential***

Our **aims** are clear. We aim to be a Trust in which:

**D**eveloping the whole child means pupils achieve and maximise their potential

**C**ontinued development of staff is valued and improves education for young people

**A**ll schools are improving and perform above national expectations

**T**he distinct Christian identity of each school develops and is celebrated

Our work as a Trust is underpinned by shared **values**. They are taken from the Church of England's vision for Education and guide the work of Trust Centre team. They are:

### **Aspiration**

I can do all things through Christ who strengthens me  
(Philippians 4 vs 13).

### **Wisdom**

Listen to advice and accept discipline, and at the end you will be counted among the wise  
(Proverbs 19 vs 20)

### **Respect**

So in everything do to others what you would have them do to you  
(Matthew 7 vs 12)

Our vision of helping every child achieve their God-given potential is aligned with the Church of England's vision for education and is underpinned by the Bible verse from John: *I have come that they may have life and have it to the full.*

## 1. Policy Aims

One of the key roles and responsibilities of the Local Governing Body (LGB) is to monitor the progress and performance of the school. Undertaking monitoring visits demonstrates the local governors' role in the strategic management of the school by helping to hold the school to account and evaluate its progress.

The LGB has approved Terms of Reference for monitoring by individuals or by pairs/groups of local governors, which anticipate that at least three monitoring activities will take place each year, as agreed in the school development plan (ADP). In some cases, (i.e. SEND, Safeguarding), more frequent monitoring may be appropriate.

This policy aims to set and maintain standards of conduct that we expect all local governors to follow when undertaking monitoring visits at their school. Governors do not have an automatic right to enter the school. When they do so, they are invited guests. Any monitoring visits must be a pre-agreed visit as part of the programme of monitoring visits. Exceptional cases may dictate an unannounced local governor visit but this should be with the agreement of the Chair of Governors and CEO of the Trust.

This policy sets out the procedure which all local governors are expected to follow when undertaking monitoring visits and how they are expected to report back on that visit to the LGB.

By creating this policy, we aim to ensure that all local governors understand their role and purpose so monitoring visits are a productive and enjoyable event for all involved.

## 2. Guidance and scope

This policy takes account of best practice and guidance from the [Governance Handbook](#) (section 3.4.2).

### 2.1 Local Governors are observers

The LGB will provide feedback and local intelligence of the school to the Trustees. Monitoring visits are a key element of this feedback. LGBs must know their school in order to maintain robust accountability and should be a visible member of the school community. Through pre-arranged monitoring visits, that have a clear focus, local governors will:

- Observe whether the school is properly implementing school policies and actions from the school development plan
- Observe how those procedures are working in practice
- Have the opportunity to gather the views of pupils and staff

### 2.2 Local Governors are not inspectors

Local Governors:

- Will not assess the quality of teaching and learning in the classroom
- Will not manage the school or interfere in the day-to-day operations of the school
- For those local governors who wish to spend time in a classroom, they will make it clear about their purpose in doing so.

### 2.3 Local Governors

Local Governors will:

- Conduct visits in a supportive and professional manner
- Display a clear interest in the school's activities and priorities
- Engage meaningfully with staff and pupils throughout the visit
- Ask informed and constructive questions to deepen understanding and provide appropriate challenge.

### 3. School or Virtual Monitoring visits

Monitoring visits may be undertaken by visiting the school or virtually. Local governors are expected to follow the same protocol for both visits. However, the following considerations should be made:

#### 3.1 Formal Monitoring Visits in School

Where visits are completed in person, at the school, local governors should ensure they follow the school's safeguarding policy and visitors' protocols, including:

- Signing in and following the school's safeguarding systems
- Wearing a governor badge throughout the duration of the visit
- Complete a formal monitoring report

In addition, the following must be observed:

- Ensure all parties are clear about why a local governor wishes to spend time in the classroom, if they wish to do so
- Check with teachers before speaking to pupils

#### 3.2 Virtual Monitoring Visits

Virtual monitoring visits can be an effective use of time for both local governors and staff. Whilst the monitoring is taking place virtually, the approach is much the same as when carrying out visits in person.

When carrying out virtual monitoring, local governors should:

- Agree the format of the meeting, e.g. telephone or video call using a pre-agreed platform, e.g. Microsoft Teams.
- Ensure that they observe confidentiality by conducting the meeting in an appropriate place.
- Only record the meeting if permission is obtained by all those present.

#### 3.3 Informal Monitoring Visits

Visits may also be made in an informal capacity by:

- attending school assemblies and worship
- supporting a school event
- helping in a class
- attending a school function or educational visit

Local governors are expected to complete a monitoring report after each formal visit using the templates in Appendix 1 and Appendix 2.

### 4. Monitoring Visits programme

The LGB will agree an annual schedule of monitoring visits with the Headteacher, which will include link governor monitoring for safeguarding, SEND and health and safety, subject leaders, etc. (See the template in Appendix 3 – this can be adapted as required.) Local governors must carry out regular monitoring visits in order to meet the governing body's statutory obligation to monitor the school's effectiveness, against the school development plan or other identified compliance area.

There are 2 types of visits:

- Formal monitoring visits, where local governors discuss the progress of the school in a particular area with the relevant staff member
- Learning walks, where local governors will go around the school with the relevant staff member to get a feel for a particular area and are likely to talk to a range of staff members and pupils

## 5. Before a visit

Local governors will:

- Notify the headteacher and the chair before scheduling a monitoring visit in line with the monitoring visits programme for the school, even if the headteacher will not be involved in the visit. They should be made aware, as a matter of courtesy
- Schedule an appointment with relevant members of staff in order to avoid friction and ensure monitoring visits are scheduled for times that are mutually convenient. Generally, monitoring visits are more productive when conducted during a school day
- Be sensitive to the numerous demands staff have on their time
- Clarify the purpose of the visit in advance with the chair, the headteacher and/or relevant member of staff ahead of the monitoring visit
- Send questions in advance to the staff member so everyone can feel properly prepared
- Be familiar with the school's safeguarding policies and procedures

## 6. During a visit

Local governors should know how to conduct themselves appropriately during visits in order to minimise disruption for staff and pupils and to receive the maximum benefit from the time spent.

Local governors will:

- Be on time
- Use the agreed recording method for the visit. Photographs and videos are to be avoided unless specifically agreed with the headteacher for a specific purpose
- Remain as observers; they are not there to pass judgement on staff or inspect them
- Pass on any concerns the staff raise with the relevant people
- Be friendly but professional and dress appropriately, bearing in mind the standards of dress set for teachers and pupils

Local governors will not:

- Pass comments on classroom practice or any specific incidents that happen, judge teaching methods, assess the quality of teaching, or comment on the extent of learning
- Interfere with the day-to-day running of the school
- Behave in a manner that would make staff feel that they are there to inspect, e.g. sit at the back of the classroom with a clipboard
- Raise concerns in the moment. Local governors should note down any concerns they may have and raise them with the chair of LGB or headteacher after the visit

## 7. After a visit

Local Governors will complete a written report as soon as reasonably practicable [example forms are attached]. Local governors will ensure to:

- Use neutral language at all times
- Remain observational, and describe only what they see
- Focus closely on the agreed reasons for the visit, and its strategic role

Once complete, local governors will submit their reports to the following people, in the following order:

- The relevant staff member, both as a courtesy and to check for accuracy
- The headteacher, as a courtesy
- The chair and clerk of the LGB

Once the report is agreed, the report should be sent to the Clerk to the LGB for circulation with the papers for the next LGB meeting.

## Appendix I: Template report for a monitoring visit

Formal monitoring visits are where you discuss the progress of the school in a particular area with the relevant staff member. Use this form as a reminder of what to look for and what to ask.

Part I: plan the visit	
<b>Name and role of governor(s)</b>	
<b>Name and role of staff member(s)</b>	
<b>Date and time of visit</b>	
<b>Agreed focus</b> Make sure you focus on this agreed reason for the visit. Avoid getting distracted by other issues that have not been agreed with the member of staff.	<i>e.g. To discuss the school's new strategy to improve the attainment of boys.</i>
<b>Relevant school objective or priority</b> This might be taken from the school improvement plan (SIP) objectives or the school's overarching vision, Christian distinctiveness or other compliance area	<i>e.g. Percentage of pupils achieving 'greater depth' in writing improves at KS2 or            Percentage of pupils achieving grade 9-4 in Mathematics and English improves.</i>
<b>Questions to ask</b> Note specific questions you want to ask based on the SIP, or points to follow up on from a previous visit. Share these questions with the staff member you are visiting in advance, so they can prepare.	<i>What is the process for supporting pupils who need extra help?            Have teachers had any training to help them put this into practice?</i>  Visit The Key's <a href="#">governors school visits: questions to ask</a> article for questions specific to the purpose of your visit.
<b>Safeguarding Observation(s) – must be completed at every visit regardless of visit focus</b>	

## Part 2: in the meeting

**What is the school doing within this area of focus?**

*Tips:*

*Ask open questions beginning with 'what', 'how', 'when', 'how often', 'why', 'who' and 'where'*

*Do not be afraid to clarify any terms or acronyms you are not familiar with*

*Remember you are not there to pass judgement on staff or inspect them – you remain an observer*

*When writing the report, use neutral language and do not name individual teachers and pupils*

**How do you know the school's actions are having an impact?**

*Remember:*

*Include specific evidence that demonstrates the positive impact the school is having in this area*

*Where a positive impact has not been made yet, note down why that is and what steps are being taken to make progress*

*Add any further evidence you would like to see to help you make a better assessment of the impact*

**What successes stood out and why?**

**SIAMS Observations and/or School Vision and Values Observations**

**Questions and clarifications to follow up with the headteacher or chair of governors**



## Appendix 2: Template report for a learning walk

Learning walks are where you will go around the school with the relevant staff member to get a feel for a particular area. You are likely to talk to a range of staff members and pupils. Use this as a reminder of what to look for and what to ask.

Part 1: plan the walk	
<b>Name and role of governor(s)</b>	
<b>Name and role of staff member(s)</b>	
<b>Date and time of visit</b>	
<b>Agreed focus</b> <i>Make sure you focus on this agreed reason for the visit. Avoid getting distracted by other issues that have not been agreed with the member of staff.</i>	<i>e.g. To see the implementation of the new strategy to improve the attainment of boys.</i>
<b>Relevant school objective or priority</b> <i>This might be taken from the school improvement plan (SIP) objectives or the school's overarching vision, Christian distinctiveness or other compliance area.</i>	<i>e.g. Percentage of pupils achieving 'greater depth' in writing improves at KS2 or            Percentage of pupils achieving grade 9-4 in English and Maths improves.</i>
<b>Questions to ask</b> <i>Note specific questions you want to ask based on the SIP, or points to follow up on from a previous visit. Share these questions with the staff member you are visiting in advance, so they can prepare.</i>	<i>Ask staff: what do you do if you think a student needs further support?</i> <i>Ask pupils: if you need help with something, what do you do?</i>  <b>Visit our <u>governors' question bank</u> for questions specific to the purpose of your visit.</b>

<b>Safeguarding Observation(s) – must be completed at every visit regardless of visit focus</b>

## **Part 2: on the walk**

### *General notes from discussions with staff*

#### *Tips:*

*Ask open questions beginning with 'what', 'how', 'when', 'how often', 'why', 'who', 'where' and 'can you show me...'*

*Do not be afraid to clarify any terms or acronyms you are not familiar with*

*Remember you are not there to pass judgement on staff or inspect them*

*When writing the report, use neutral language and don't name individual teachers*

### **General notes from discussions with pupils**

#### *Remember:*

*Do not ask them for pupils' views on a specific teacher*

*Do not record pupils' names*

### **General notes on the school environment and overall atmosphere**

#### *Note:*

*Whether the governors' vision of the school is replicated on the ground*

*Any issues with the school site you see e.g. broken equipment or lack of resources*

### **What successes stood out on the learning walk and why?**

**Did you observe any evidence of the school's vision or values during the learning walk? This could include school displays or examples of the values 'in action'.**

**Questions and clarifications to follow up with the headteacher or chair of governors**

## Appendix 3: Template report for a monitoring visit

SCHOOL IMPROVEMENT OBJECTIVE	SPECIFIC AREA OF FOCUS ON THE VISIT	GOVERNOR(S) NAME AND ROLE	STAFF MEMBER(S) NAME AND ROLE	REPORTING DEADLINE	INTENDED IMPACT OF VISIT
<b>Term 1</b>					
<b>Term 2</b>					
<b>Term 3</b>					
<b>Term 4</b>					

Term 5					
Term 6					