



GOVERNOR MONITORING VISITS POLICY

2026-27

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Headteacher:	Mrs Kayleigh Anstee
Chair of Governors:	Kevin Moyes
Policy Owner:	Full Governing Board

Signed

Kevin Moyes – Chair of Governors



1. Purpose and governance context

Gateway Primary School operates a Circle Model of Governance. The Full Governing Board retains collective accountability for the school and uses planned monitoring, including school visits, to test assurance, understand impact and inform strategic decision-making. A monitoring visit is one source of evidence: it does not replace Full Governing Board scrutiny, Headteacher reporting, data, audit or external assurance.

This policy sets the framework for governor visits so that they are purposeful, proportionate, safe and useful, strengthen the Board's understanding of the school, and do not blur the distinction between strategic governance and operational leadership.

2. Statutory and good-practice framework

Status	Source	How it applies
Statutory framework	<u>School Governance (Roles, Procedures and Allowances) (England) Regulations 2013</u>	Sets the Governing Board's strategic functions and collective responsibilities. Individual governors only exercise authority where a function has been lawfully delegated.
DfE guidance	<u>Maintained schools: governance guide – school visits</u>	States that individual governors have no automatic right to enter the school; focused visits should have an identified purpose, align with school improvement/governance responsibilities and be pre-arranged with the Headteacher. Governors do not assess teaching or interfere in day-to-day management.
Statutory safeguarding guidance	<u>Keeping Children Safe in Education 2026</u>	Applies to governing bodies and informs how safeguarding concerns arising during monitoring must be handled and escalated.
Local guidance	<u>Oxfordshire Governor Services – managing the governing board</u>	Provides the annual schedule, monitoring plan and governor monitoring visit template used to support Oxfordshire maintained schools.
Local training	<u>Oxfordshire Governor Services – governor visits</u>	Reinforces monitoring visits as part of the wider evidence base for understanding strengths, weaknesses and the impact of improvement activity.
Good practice	<u>NGA – School monitoring visits</u>	Provides planning, visit and reporting guidance so visits are focused and have a positive impact.
Good practice	<u>NGA – Link governors and trustees</u>	Confirms that lead/link roles deepen monitoring but do not remove the Full Governing Board's collective responsibility.



3. Core principles

- All monitoring is undertaken on behalf of the Governing Board. A governor does not act as an individual inspector, manager or representative of a particular constituency.
- Every monitoring activity will have a clear purpose linked to the School Development Plan, an identified statutory duty, Governing Board objective, material risk or agreed governance priority.
- Visits will be proportionate and pre-arranged with the Headteacher or their nominated senior leader. Individual governors do not have an automatic right to enter the school whenever they wish.
- Governors will triangulate evidence. No material judgement will be based on a single visit or source of information.
- Governors will not assess the quality of an individual teacher's performance, conduct lesson observations for appraisal purposes, direct staff or become involved in routine operational management.
- The dignity, privacy, safeguarding and wellbeing of pupils and staff will take priority over the monitoring objective.
- Monitoring will be designed to add value without creating unnecessary workload for staff or governors.
- Lead and Deputy Lead Governors coordinate scrutiny in their allocated areas, but the Full Governing Board retains collective responsibility and will consider the resulting evidence.

4. Types of governor visit

4.1 Induction and familiarisation

New governors may undertake planned visits as part of the Governor Induction Policy to understand the school, its context, safeguarding arrangements, curriculum and community. These visits are developmental rather than monitoring visits unless a separate monitoring objective has been agreed.

4.2 Strategic monitoring visits

These visits test progress, implementation and impact in an agreed area. They may relate to the School Development Plan, safeguarding, SEND, attendance, health and safety, finance, premises, staff wellbeing, community engagement, environmental sustainability or another Board priority.

4.3 Community and school events

Attendance at assemblies, performances, parent events, celebrations and similar activities helps governors understand and be visible within the school community. Such attendance is not, by itself, a formal monitoring visit and does not normally require a monitoring report unless the Board has agreed a specific monitoring purpose.

4.4 Activities outside this policy

Formal complaints, investigations, disciplinary or grievance matters, exclusion/suspension reviews, recruitment panels, Headteacher appraisal, pay decisions and appeals are governed by their own procedures and are not monitoring visits under this policy. Routine Chair–Headteacher meetings are also outside this policy, although relevant assurance may subsequently be reported to the Board.



5. Annual monitoring programme

The Full Governing Board will agree an annual Governor Monitoring Schedule, aligned with the annual Governor Work and Meeting Schedule, School Development Plan, statutory responsibilities, Board objectives and key risks. It will identify, as appropriate, the area to be monitored, purpose, Lead/Deputy Governor, proposed evidence, likely timing and how findings will be reported.

- The schedule will be reviewed at least termly so that monitoring can respond to emerging risks, external findings, changes in school performance or completed priorities.
- Monitoring will be coordinated to avoid duplication and unnecessary requests to staff. There is no fixed maximum number of visits: frequency will be proportionate to the importance, risk and assurance needs of the area.
- Safeguarding monitoring will take place at least termly in line with the Governance Policy and annual schedule, with other statutory or specialist monitoring undertaken at the frequency agreed by the Board or required by guidance.
- Where evidence can be obtained more efficiently through reports, data, virtual meetings or desk-based review, a school visit will not be arranged simply for visibility.

6. Planning a monitoring visit

Before a visit, the governor and Headteacher/relevant leader will agree the purpose, scope, practical arrangements and evidence to be considered. The governor will normally provide the agreed focus and key questions at least five working days in advance, unless a shorter period is mutually agreed.

- The governor will read relevant policies, previous monitoring reports, School Development Plan actions, data and Board minutes before the visit.
- The purpose will be framed around assurance and impact: what is expected, what evidence shows, what is working, what risks or gaps remain, and what the Board needs to know or decide.
- Any request for staff or pupil involvement will be agreed in advance and kept proportionate.
- Potential conflicts of interest will be considered. A parent governor will not normally monitor their own child's class or an issue in which they have a direct personal interest.
- Where a visit may involve sensitive or personal information, the minimum necessary information will be used and the Headteacher/DSL/DPO will determine appropriate access arrangements.
- Governors undertaking specialist monitoring will have completed or be undertaking appropriate role-specific training.

7. Conduct during a visit



- Governors will sign in, wear the required visitor/governor identification and follow the school's safeguarding, health and safety, security and visitor procedures at all times.
- The visit will stay within the agreed scope. Governors may ask appropriate questions and seek evidence, but will not direct staff, resolve operational issues or make commitments on behalf of the Board.
- Classroom visits or learning walks will be brief, planned and normally undertaken with a school leader or member of staff. Governors will focus on the agreed strategic question and pupil experience, not evaluate individual teaching performance.
- Pupil voice will be arranged by the school and conducted in a way that is age-appropriate, inclusive and safe. Governors will not seek disclosures, question pupils about individual staff members or undertake unsupervised one-to-one interviews unless a specific lawful process requires it and appropriate safeguards have been agreed.
- Governors will not photograph pupils, staff, screens, records or pupil work containing identifiable information on a personal device. Any agreed evidence capture must follow school data-protection and safeguarding arrangements.
- Governors will treat staff courteously and thank them for their time. If a staff member raises a personal employment concern, complaint, grievance or whistleblowing issue, the governor will listen appropriately but will not investigate, promise an outcome or become an informal intermediary; the person will be signposted to the relevant procedure.
- A safeguarding concern arising during a visit will be acted on immediately in accordance with the school's Child Protection and Safeguarding Policy and KCSIE 2026. It will be reported without delay to the DSL or deputy. Where the concern relates to a person who would normally receive it, the appropriate alternative safeguarding/allegations or whistleblowing route will be used.
- Other material concerns will be raised with the Headteacher or appropriate senior leader during or immediately after the visit, unless doing so would be inappropriate because of the nature of the concern.

8. Confidentiality, information and data protection

- Governors will maintain confidentiality in accordance with the Code of Conduct, Governance Policy and data-protection requirements.
- Monitoring should normally use aggregated or anonymised information. Reports will not identify individual pupils, families or members of staff unless this is strictly necessary for a formal governance purpose and lawful to record.
- Access to the Single Central Record or other sensitive records will be limited to what is necessary for the agreed monitoring purpose and will take place with an appropriate school leader; governors will not copy or retain personal data unnecessarily.
- Confidential information will be stored only in the Board's approved secure governance system or other authorised school system and will not be transferred to personal email accounts or unsecured storage.

9. Reporting after a monitoring visit

The governor will complete the agreed Governor Monitoring Visit Record promptly, normally within ten working days and in sufficient time for the next relevant Full Governing Board meeting. The report will be concise, evidence-led and distinguish fact from interpretation.

A good monitoring report will normally record:

- the purpose and date of the visit, governor(s) involved and staff/pupils consulted;



- the evidence reviewed and how it links to the agreed objective;
- key strengths and assurance gained;
- material questions, risks, gaps or areas requiring further assurance;
- evidence of impact or progress against the relevant plan/priority;
- any agreed follow-up, owner and timescale; and
- questions or recommendations for the Full Governing Board.

The Headteacher or relevant leader will be given an opportunity to correct factual inaccuracies before the report is finalised. The report remains the governor's report and does not require management approval. Differences of interpretation may be recorded rather than removed.

The report will be shared securely with governors and considered at the next appropriate Full Governing Board meeting. The minutes will record the material assurance, challenge, decisions and actions arising. Confidential or sensitive material will be separated or restricted as appropriate. Monitoring actions will be tracked through the Board's action log and/or monitoring schedule.

10. Governor visibility and community events

Governors attending school events in their governance capacity will be welcoming and visible, normally wearing a governor badge where appropriate. They will remember that they represent the Governing Board, will not present personal views as Board policy, and will not use informal events to manage complaints or individual cases. Concerns raised by parents or others will be signposted to the appropriate school process.

11. Evaluating the impact of monitoring

At least annually, the Full Governing Board will review whether its monitoring programme is proportionate and effective. It will consider whether monitoring has improved Board understanding, strengthened challenge, identified risks early, evidenced impact against priorities and informed decisions without creating unnecessary workload.

- The Board will review Lead/Deputy allocations, skills and training needs alongside this evaluation.
- The monitoring schedule and templates will be adjusted where evidence shows that a different approach would provide better assurance.
- Themes arising from monitoring will inform governance self-evaluation and the following year's Board objectives and monitoring plan.

12. Related policies, tools and guidance

Gateway documents: Governance Policy; annual Governor Work and Meeting Schedule; annual Governor Monitoring Schedule; Governor Induction Policy; Code of Conduct; Child Protection and Safeguarding Policy; Complaints Policy; Whistleblowing Policy; Data Protection Policy. [Gateway school policies](#)

Oxfordshire resources: [Managing the Governing Board](#) | [Link governor/committee resources and monitoring template](#) | [Governor visits training](#)

National resources: [DfE maintained schools governance guide](#) | [KCSIE 2026](#) | [NGA school monitoring visits](#) | [NGA link governors and trustees](#)



Appendix 1 – Monitoring visit planning checklist

- ☐ Is the visit included in, or subsequently authorised under, the Board's monitoring schedule?
- ☐ What statutory duty, School Development Plan priority, Board objective or risk does it relate to?
- ☐ What question is the Board trying to answer?
- ☐ What evidence already exists, and is a visit necessary?
- ☐ Who needs to be involved, and how will workload be minimised?
- ☐ What documents/data should be read beforehand?
- ☐ Are there safeguarding, equality, confidentiality, data-protection or conflict-of-interest considerations?
- ☐ What evidence will demonstrate impact rather than simply activity?
- ☐ When and how will findings be reported to the Full Governing Board?
- ☐ What follow-up would be proportionate if assurance is incomplete?

Appendix 2 – Minimum monitoring report headings

Visit details

Date; governor(s); staff/leader(s); monitoring area

Purpose

Agreed objective and link to SDP/statutory duty/Board objective/risk

Evidence reviewed

Documents, data, discussions, pupil/staff voice, observations

Assurance / strengths

What the evidence supports

Impact / progress

What has changed or improved; evidence against success criteria

Risks / gaps / questions

What remains unclear, incomplete or requires challenge



Follow-up

Action, owner and timescale where agreed

For the Board

Key questions, recommendation or decision required

Factual check

Date shared with Headteacher/relevant leader; factual corrections made

