

Director/Governor Visit Policy

Status	Statutory
Version	7
Responsible Directors' Board	Full Board of Directors
Responsible Persons	Director of Governance and Corporate Affairs
Date Policy Reviewed	July 2026
Next Review Date	September 2027
Academy to implement without Amendment, using appendix when required	

Summary of Changes from Previous Version

Version	Date	Author	Summary of Updates
V1	November 2020	B Nixon/J Tuke	New Policy
V2	September 2021	A Hibbitt	Update made to Annex B - Record for a governor's school visit to reflect Governor and Director
V3	September 2022	A Hibbitt	Review Completed, no changes
V4	September 2024	HOGPC	Review Completed, no changes
V5	August 2024	HOGP	• Transfer to new template and reformat • Academy Improvement Plan renamed to Academy Development Plan • Removed reference to Headteacher and updated to Principal/Head of School • Updated section relating to annual governor visit plan to indicate the plan is a requirement rather than just being 'helpful' to have. • Updated Governor Visit template to include section to document observations relating to Academy Leadership.
V6	July 2025	HOGP	• Updated Appendix with link to Monitoring forms on Governance Hub and copies of templates • Added Review Section - The Head of Governance and Policy will review the frequency, breadth, and quality of director/governor visits annually to ensure alignment with Trust strategic objectives. Findings will be shared with the Audit and Risk Committee.
V7	July 2026	Director of Governance and Corporate Affairs	• Updated to reflect new governor monitoring Forms



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1. Introduction

The Trust Board and the Local Governing Boards of Exceed Learning Partnership have three main roles. These are strategic direction, critical friend and accountability. Visiting the academy/school in session helps to develop and understand the roles and is the best way to learn how the academy functions so that you can increase the governing board's first-hand knowledge and inform strategic decision making.

Through visits Directors/Governors will have the opportunity to observe policies and plans being implemented, which will help make well-informed judgements about progress being made towards the priorities and targets in the Academy Development Plan. The number and frequency of visits will vary.

Visits should generally relate to the priorities determined by the Academy Development Plan and cover a wide range of activities. Each visit should be agreed in advance and have a clear purpose. Directors/governors should arrange these visits with the Executive Principal/Principal/Head of School who has the responsibility for the day-to-day management of the academy.

This policy is to be used as part of Governor and Director Induction and throughout the academic year by all Governors and Directors.

2. Potential Benefits

To Directors/Governors:

- Recognise and celebrate success
- Develop relationships with staff
- Get to know the children
- Recognise different teaching styles
- Understand the environment in which teachers teach
- Monitor policies in action
- Find out what resources are needed and prioritise them
- Deepen understanding and increase confidence and knowledge
- Inform decision making

To Teachers:

- Ensure directors/governors understand the reality of the classroom
- Get to know directors/governors
- Understand better their director/governor roles and responsibilities
- Have an opportunity to reflect on practice through discussion
- Highlight the need for particular resources

Governor visits are not:

- A form of inspection to make judgements about professional expertise of the teacher
- An opportunity to check on the progress of own children



- An opportunity to pursue a personal agenda
- The chance to monopolise academy/teacher time

3. Roles and Responsibilities of Directors/Governors, Principal and other Staff

The governing board should, with the help of the Principal/Head of School and staff, organise an annual schedule of school visits throughout the year. The Principal/Head of School will guide the governing board on the areas of the curriculum, policies and Academy Development Plan priorities and targets to be covered each term.

Individual director/governors or pairs of directors/governors will, with the guidance of the whole governing board, identify an aspect of the school's work to focus on in order to deepen their understanding.

4. Guidelines

Preparing for a visit

- Clarify the purpose of the visit. Is it linked to the Academy Development Plan? What are the relevant Trust Policies? How does this determine the activities I am interested in?
- Discuss an agenda with the Principal/Head of School well in advance. Make sure that the date chosen is mutually agreed and convenient.
- Use the school visits pro forma – see Appendix B
- The Principal/Head of School will share the agenda with staff involved. Will directors/governors visit a class, undertake a learning walk. Will it be helpful to see relevant documents beforehand?

During the Visit

- Remember you are making the visit on behalf of the governing board.
- Directors/governors do not make judgements or promises - it is a visit not an inspection.
- Be punctual, courteous and considerate at all times, respecting the professional roles of the Principal/Head of School and staff.
- If visiting a class, agree with the teacher how you will be introduced and what your role in the class will be and what involvement you will have with children.
- Observe discretely - don't distract the teacher during the lesson but be prepared to talk and show interest.
- Interact, don't interrupt - listen to staff and pupils.

Teachers and support staff will at all times be courteous and considerate, recognising the contribution made by the governing board to the academy.



They may make practical suggestions on the focus for director/governor visits to ensure that they are productive and enjoyable for all concerned. This could include specifying the evidence that could be shared with directors/governors. See Appendix A for a list of things which directors/governors could examine/explore. Whenever practical they will invite their link/curriculum directors/governors to relevant staff meetings and training sessions. Questions will be invited from directors/governors, while being sensitive to issues of confidentiality. See annex B for examples of questions which could be asked. Although these focus on literacy, numeracy and SEND, many of the questions can easily be adapted to other areas of the curriculum.

After the visit

- Discuss what you have observed with the teacher. Use the opportunity to clarify any issue you are unclear about.
- Refer to the purpose of the visit. Consider together whether it has been achieved
- Thank the teacher for supporting you in your role as a governor. Be open, honest & positive.
- Make notes as soon as possible after your observation while it is still fresh in your mind and share the report with the Principal/Head of School for agreement that it is a true reflection of the visit.
- Reflect on the visit, for example: how did that go? Has the visit enhanced relationships? Have I learnt more about the academy? Have I gained more confidence in my role as director/governor?
- All observations and reports must be treated as confidential and handled in line with the Trust's Data Protection and GDPR Policy

Reporting your visit

- All director/governor visits should be recorded and shared. This helps demonstrate the involvement directors/governors have in the life of the school and how they support their own learning.
- Write a short summary of what you learned during the visit and the overall impression that was made. This will be easier if the visit had a focus. See Appendix B for a report format.
- You must circulate a draft to the Principal/Head of School and staff involved for them to check the accuracy and clarity. Be prepared to amend it. Aim to achieve a report that is agreed by all those involved.
- Have the report added to the next available agenda of the Governing Board and be prepared to answer questions from other directors/governors.
- Templates for recording these visits are listed within the Appendices of this Policy.

Visit Focus

Although not an exhaustive list visits may focus on:



- Particular subjects, key stages or classes
- Academy leadership
- The use made of the building or the site
- The condition and maintenance of the premises
- Special educational needs
- Literacy and numeracy
- The use of ICT equipment
- The impact on the academy of any changes e.g. reduced classes in key stage
- Impact of specific targets identified in the Academy Improvement Plan
- Impact of Staff Professional Learning
- Health and Safety
- Triangulation through parent voice where appropriate, especially for pupils receiving Pupil Premium and those with SEND.

Review

The Director of Governance and Corporate Affairs will review the frequency, breadth, and quality of director/governor visits annually to ensure alignment with Trust strategic objectives. Findings will be shared with the Audit and Risk Committee.

Policy Agreed November 2020 and reviewed July 2026

Signed CEO: *B.A. Nixon*

Signed: Chair of Directors: *Pat Hogan*

Policy to be reviewed in September 2027



Appendix A: Monitoring and Questions

Governor Monitoring can take several forms:

- Meeting with subject leaders/head of year/house/support staff
- Snapshot of a lesson
- Discussions with pupils
- Walk around the academy

Aims:

- To know and understand the level of enjoyment pupils have for a subject
- Understand what pupils like best/least in the school
- Know the standards of achievement in a subject area
- Know what steps are being taken to improve standards
- Know how well strategic policies approved by directors/governors are working
- To report main findings back to the full governing board

Observations to make when visiting a classroom

- Relationship between all staff in the classroom and pupils
- Relationship between pupils
- Variety of teaching styles
- Availability and role of support staff
- Behaviour and attitude of pupils – are they attentive, motivated, listening, questioning, responding
- Enjoyment and enthusiasm of both staff and pupils
- How pupils are grouped? How different abilities are catered for?
- Children's work & Displays
- Ethos – the atmosphere and values that are evident (are expectations high, encouragement, praise, equality of opportunity apparent?)
- Use of space, quality and quantity of equipment and resources
- Health and safety regulations practiced i.e. fire exits kept clear

Governor Monitoring form templates are available via [Governance Hub](#)

Questions

To ask pupils:

- Tell me about what you are learning today
- Do you like (select curriculum area being monitored)
- Tell me what you most like doing in (select curriculum area being monitored)
- Is there anything you don't like in (select curriculum area being monitored)

To ask subject leaders/co-ordinators:

- What is your vision for the subject?
- What were the Ofsted findings about the subject?
- What are the strengths of the subject and areas for development? How do you know?



- How do you keep a track of standards and progress across the school in this subject?
- What improvements have you made/planned for this year in the subject?
- What resources does the school have for the subject and how are these organised?
- How do you help develop other teachers' skills in teaching this subject?

In the classroom

Question	Possible features of answer	Notes of answer
Help me to understand how you plan your lessons: how do you get from the National Curriculum to deciding what pupils will be doing in Science today?	National Curriculum Key stage plan Scheme of Work Year/termly/weekly/daily plans Individual plans	
How do you judge how well pupils are learning and making progress?	Questioning in lessons Marking Assessments Target-setting and achieving Value-added data	
What learning resources are available to your pupils and how do they learn effectively?	ICT – access to equipment Use of library Use of basics like pens and pencils. Good labelling Borrowed resources	
How do you cope with the needs of different pupils?	Boys/girls Most able/ SEN D English as an additional Lang Behavioural Disabled	
How do you decide to seat children and arrange the classroom? Does it ever vary and why?	Ability groups Mixed or single age groups Boy-girl patterns Different for different activities	
How do you encourage parents to be involved in their children's learning?	Regular contact Reports Parent evenings Letters Diaries	

Communication

- How are parents kept informed of progress?
- How do you gather parent's views? Has action been taken on their views?
- What steps are taken to encourage parents to support their children in reading/writing at home?



Appendix B – Governor Monitoring Forms

Academy Development Plan (ADP) Governor Monitoring Form

Academy:	Date:	Name/Area of Responsibility:	Governor Name:				
Reason for Visit: To review leaders actions and progress in relation to the Academy Development Plan							
Area of session focus: <i>Insert Academy Priority</i>							
Discussions / Outcomes:							
Context to be discussed with Academy Leaders							
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Priority</td> <td style="width: 50%;">KPI</td> </tr> <tr> <td style="height: 30px;"></td> <td></td> </tr> </table>				Priority	KPI		
Priority	KPI						
Agenda (Below are a list of potential activities- delete as appropriate) - Discussion with leaders regarding progress - Review of data - Discussions with staff - Discussions with pupils - Pupil work scrutiny - Lesson visits - Review of interventions - Observation of new approach being implemented							
Discussion Questions		Yes/No/To an extent	Evidence/commentary				
Have leaders taken specific actions to meet ADP objectives?							
Have elements of the ADP been achieved so far?							
Has professional development been put in place in terms of ensuring understanding of the ADP?							
Were staff prepared for this CPD?							
Is progress being effectively monitored?							
Has pupil voice been effectively captured?							
Are leaders able to identify strengths of ADP delivery?							
Are leaders able to identify difficulties in ADP delivery?							



Have leaders identified any unforeseen risks, such as financial or staffing implications?		
Are the challenges facing this priority explicitly captured on the Academy Risk Register, and are mitigating actions properly resourced?		
Are leaders still confident that this is the right approach?		
Have leaders appropriately considered and supported staff wellbeing and workload?		
Have leaders been able to capture the impact that the ADP has had on vulnerable children (disadvantaged, SEND and pupils under or previously under social care)?		
Does the Academy require any additional support?		
Comments arising from discussions and activities:		
Next Steps / Further Action required:		
Evaluation of Visit:		
Signed Leader		
Signed (Academy Principal/Head of School):	Signed (Governor):	



Attendance Governor Monitoring Form

Academy:	Date:	Area of Responsibility: Attendance	Governor Name:							
Reason for visit: Provide strategic oversight of attendance processes in the academy. Ensure accountability of the academy leadership in delivering effective attendance practice and reducing persistent absence.										
Academy context to be discussed with the Attendance Leader Review timeframe (e.g. YTD)										
Whole school % (Stat age only)	Whole school % (inc. non-stat age)	School PA % (below 90%)	Number of PA pupils	School SA % (below 50%)	Number of SA pupils	Number of 'at risk' pupils (90-4.9%)	Number of referrals to LA (e.g. FPN)	FSM attendance %	EHCP attendance %	SEND support attendance %

Discussion Questions

Question	Yes/No/To an extent	Evidence / Commentary
Policy and Compliance		
Is the academy's Attendance Policy up to date and compliant with DfE guidance?		
How is the Attendance Policy shared with staff, parents, and pupils?		
Are statutory attendance registers completed accurately and on time?		
How are updates or changes to attendance legislation/guidance cascaded to relevant staff?		
Interventions and Support		
What is the threshold for triggering formal attendance concerns (e.g. letters home, meetings)?		
Do staff (e.g. class teachers) know the process for referring attendance concerns internally?		



What early intervention strategies are used to tackle emerging attendance issues (e.g. phone calls, home visits, pastoral support, pupil surveys)?		
What specific support is offered to Persistent Absentee (PA) and Severe Absentee (SA) pupils and their families?		
What specific support is offered to At Risk of PA (ARPA) (90-94.9%) pupils and their families?		
How is the impact of attendance interventions reviewed and measured?		
What are the prevailing local barriers to attendance this term, and how effectively are external local authority pathways being leveraged?		
Culture and Pupil Voice		
How does the academy promote a culture where good attendance is valued and celebrated?		
How do we know that pupils feel motivated to attend school regularly?		
Which pupil groups (e.g. year groups, SEND, PP) have the lowest attendance, and what targeted support is in place?		
Leadership and Management		
Who is the Attendance Lead? How is their role supported and structured?		
How is attendance data discussed and analysed at leadership and governor meetings?		
What systems are in place for the Attendance Lead/Team to track daily attendance and follow up on absences?		



What support has been received from the Trust or Local Authority regarding attendance improvement?		
Statutory Procedures		
How are leaders assured that statutory attendance referrals (e.g., legal action) are followed up effectively?		
What procedures are in place to monitor the attendance of pupils on Alternative Provision (AP)?		

Comments arising from discussions and activities:	
Next Steps / Further Action required:	
Evaluation of Visit:	
Signed (Academy Attendance Lead):	
Signed (Academy Principal/Head of School):	
Signed (Governor):	



Careers (Secondary) Governor Monitoring Form

Academy:	Date:	Name/Area of Responsibility:	Governor Name:
Reason for Visit: Strategically monitor the academy's delivery of a world-class careers programme. Ensure statutory compliance with the DfE's Careers Guidance duty, fulfilment of all 8 Gatsby Benchmarks, and full compliance with the Provider Access Legislation.			
Name of the Designated Careers Leader: _____ Compass Tool Score (Gatsby Benchmarks fully met out of 8): _____ / 8 % of Year 11/13 pupils tracking towards positive destinations: _____ Date of the last self-assessment upload: _____			
Agenda (Suggested: 1.5 - 2 Hours) 1. Discussion with the Careers Leader reviewing the latest evaluation report. 2. Review of destination data, tracking vulnerable cohorts (SEND, Pupil Premium). 3. Review of the Provider Access Policy statement and log of encounters. 4. Quick discussion with a small panel of pupils (e.g., Key Stage 4 or 5) regarding their career tracking.			
Strategic Discussion Questions		Yes/No/To An Extent	Evidence/commentary
How are leaders actively closing gaps in any Gatsby Benchmarks where the school scored below national or Trust targets on Compass?			
Does the academy provide mandatory opportunities for a range of education and training providers (colleges, apprenticeships) to speak to pupils?			
How do leaders use careers provision to combat stereotypes and support vulnerable groups (SEND, PP, Looked After Children) into secure destinations?			
How effectively do subject teachers link classroom learning with real-world careers and industries?			
What mechanisms ensure that work experience placements or workplace encounters are high quality and directly tailored to pupil aspirations?			



Next Steps / Actions	
Signed (Academy):	Signed (Governor):

Pupil Premium Governor Monitoring Form

Academy:	Date:	Name/Area of Responsibility: Inclusion - pupil premium	Governor Name:		
Reason for Visit: - Monitor and review the impact of how Pupil Premium funding is used within the academy and contribute to the strategy for its use. - Review academy data relating to the performance of disadvantaged pupils, gaps in attainment and progress. - Support leaders in evaluating and sustaining the impact of their strategies.					
Area of session focus: Pupil Premium					
Discussions / Outcomes: Context- to be discussed with the pupil premium lead <table border="1" style="width: 100%; margin-top: 5px;"> <tr> <td style="width: 35%; padding: 5px;">Whole school PP (number and %)</td> <td style="height: 20px;"></td> </tr> </table>				Whole school PP (number and %)	
Whole school PP (number and %)					
Agenda (suggested 1.5 hours) - Discussion with pupil premium lead - Review of pupil premium strategy including evaluation of the previous year - Review of pupil premium attendance data - Review of data related to pupil premium take-up in wider experiences such as trips, after school clubs and sporting events - Review of leaders analysis of interventions and impact					
Further potential activities - Discussion with pupil premium pupils - feelings about school including sense of belonging and safety - Learning walk - Watching interventions - Discussion about provision for the first 20%					
Discussion questions		Yes/No/To an extent	Evidence/Commentary		
Is the pupil premium strategy up to date and on the academy website?					
Are leaders clear about the challenges their disadvantage pupils face? (This should be contained in their pupil premium strategy. Ensure you are satisfied that leaders <i>know</i> these are the barriers.)					



Are barriers addressed through: high-quality teaching, targeted academic support and wider strategies such as attendance initiatives?		
Is funding spent in line with conditions of the grant (here)		
Are leaders clear about the intended outcomes they are aiming for by the end of the current strategy plan?		
In deciding how to spend the funding, do leaders consider research such as the EEF toolkit?		
Have leaders effectively evaluated outcomes from the previous year? Do they know which initiatives created the biggest impact?		
Do pupil premium children achieve well compared to non-pupil premium children in the academy? (Consider all data: EYFS, phonics, end of year outcomes and attainment at the end of year 6)		
Do pupil premium children achieve well compared to pupil premium children nationally?		
Do leaders know which year groups and which pupils need more support to achieve?		
Are support staff well-trained to support quality first teaching?		
Do leaders have a clear rationale for interventions and do they know the impact?		
How well is the school using Pupil Premium funding to support pupils to develop positive attitudes to learning and a thirst for knowledge across all learning contexts?		
Where support is focused on wider issues in pupils' and their families' lives and / or to widen opportunity, is there evidence that this support is improving engagement and contributing to closing performance gaps?		
Do pupil premium children have good attendance compared to other pupils and national comparisons?		
Do pupils with pupil premium participate in: • after school clubs • breakfast club provision • trips/residential • sporting activities		
How does the PP strategy map directly against the priority areas identified in the current Academy Development Plan?		
Comments arising from discussions and activities:		



While the primary focus of the monitoring visit is not Safeguarding, Wellbeing, Health & Safety/Compliance or Leadership these areas remain important and should be taken into account during all Academy visits. Please include any observations that may require the Board's attention.	
Safeguarding:	
Wellbeing:	
Health & Safety/Compliance:	
Next Steps / Further Action required:	
Evaluation of Visit:	
Signed (Academy Pupil Premium lead)	
Signed (Academy Principal/Head of School):	Signed (Governor):



Safeguarding Governor Monitoring Form

Academy:	Date:	Name/Area of Responsibility: Safeguarding		Governor Name:				
Reason for Visit: - Provide strategic oversight of safeguarding processes in the academy - Ensure accountability of the academy leadership in delivering effective safeguarding practice								
Discussions / Outcomes:								
Context- to be discussed with the DSL								
Number of CP cases (individual children)	Number of CIN cases (individual children)	Early Help Cases where the academy is lead	Early Help Cases where the academy is not the lead	Number of MASH referrals during review window	Number of FGM cases	Number of Prevent referrals	Number of HSB referrals / incidents	Number of pupils accessing AP (Alternative Provision)
Discussion questions							Yes/No/To an extent	
Policy and compliance								
Is the academy safeguarding policy up to date and compliant with KCSIE?								
Evidence / commentary:								
How is the safeguarding policy shared with staff and parents?								
Evidence / commentary:								
When was the SCR last audited - were there any gaps?								
Evidence / commentary:								
How are safeguarding updates or changes to legislation cascaded to staff?								
Evidence / commentary:								



Training	
Have all staff completed statutory safeguarding training? When?	
Evidence / commentary:	
What arrangements are in place to assure that visitors or contractors are safe to be working with children?	
Evidence / commentary:	
Do staff know how to report concerns, including low-level concerns?	
Evidence / commentary:	
What additional training have staff received (e.g Prevent / FGM / online safety)?	
Evidence / commentary:	
How are new staff and volunteers inducted in safeguarding procedures?	
Evidence / commentary:	
Culture and Pupil Voice	
How do we know that children feel safe in school?	
Evidence / commentary:	
How is safeguarding taught throughout the curriculum?	
Evidence / commentary:	
Which pupil groups are most vulnerable - how are they supported?	
Evidence / commentary:	
What was the outcome of the latest pupil voice survey? What actions have been taken?	
Evidence / commentary:	



Leadership	
Who is the DSL? What is the structure of deputies?	
Evidence / commentary:	
How is safeguarding discussed at leadership meetings?	
Evidence / commentary:	
What is the mechanism for supervising the DSL?	
Evidence / commentary:	
What support has been received from the Trust (e.g. Assurance cycle visits)	
Evidence / commentary:	
Contextual needs	
What are the contextual safeguarding needs of the academy? How are these being met?	
Evidence / commentary:	
What systems are in place to manage online safety?	
Evidence / commentary:	
How are leaders assured that referrals to MASH are followed up effectively?	
Evidence / commentary:	
How do leaders review block/filter logs, and when was the last external SCR health check?	
Evidence / commentary:	
Comments arising from discussions and activities:	



Next Steps / Further Action required:	
Evaluation of Visit:	
Signed (Academy DSL)	
Signed (Academy Principal/Head of School):	Signed (Governor):

Accessibility Plan Monitoring Form (To be completed annually)

Academy:	Date:	Name/Area of Responsibility: SEND and disability	Governor Name:
Reason for Visit:			
Area of session focus: SEND and Disability			
Discussions / Outcomes:			
Focus of the visit: - In Year 1 of the plan: Our classrooms and buildings - In Year 2 of the plan: The curriculum- Our pupils's learning - In Year 3 of the plan: Written Resources At the end of the 3 years, the SENDCo will report to governors on how successful we have been-linked to the goals. Each year SEND reports should include a reflection about the progress against this.			
Agenda (suggested 2 hours) - Reflect on the goals identified in the accessibility document. - Discussion surrounding each target identified in the relevant section. - Discussion with pupils linked to the relevant area - Site walk (important for classrooms and buildings visit) - Sample of pupils work and newsletters			
Further potential activities			
Discussion questions		Yes/No/To an extent	Evidence/commentary
Are the goals identified in the accessibility plan still relevant? How successful has the academy been in achieving these goals? What does the academy need to do next?			
Have targets been achieved? What requires more development?			



Are leaders able to provide evidence to support their narrative regarding the progress of targets?		
Is pupil voice considered in decisions about support for those with SEN and disabilities at both individual and school level?		
Is the Accessibility Plan currently live on the website, and does it clearly show its 3-year publication cycle date and annual review log?		
How does the plan improve accessibility across digital platforms, learning management systems, and assistive technology for exams?		
Can leaders demonstrate how a completed target (e.g., physical adjustments or resource modifications) has directly increased pupil self-reliance?		
Comments arising from discussions and activities:		
Next Steps / Further Action required:		
Evaluation of Visit:		
Signed (Academy SENDCO)		
Signed (Academy Principal/Head of School):	Signed (Governor):	



Special Educational Needs and Disability (SEND) Governor Monitoring Form

Academy:	Date:	Name/Area of Responsibility: Inclusion - SEND	Governor Name:
Reason for Visit: Ensuring high quality outcomes for pupils with SEND To champion the school's support for pupils with SEND, including good practice in pupil engagement			
Area of session focus: SEND			
Discussions / Outcomes:			
Context- to discussed with the SENDCO			
Percentage of SEND support	Percentage of EHCP	Breakdown is of pupils with SEND by category of need	
Agenda (suggested 2 hours) - Discussion with the SENDCO - questions below can support the dialogue - Consider parent and pupil voice samples including surveys - Review an EHCP and discuss how funding is allocated and spent - Documentation review (see section below)			
Further potential activities - Discussion with SEND pupils- feelings about school including sense of belonging and safety - Learning walk - Visit to SEND provision (essential if academy has bespoke provision) - Discussion with staff working directly with SEND pupils - to include wellbeing and training			
Discussion questions	Yes/No/To an extent	Evidence/commentary	
Does the academy promote an inclusive culture?			
Is there effective communication and engagement between the academy and parents of pupils with SEN and disabilities?			
Are parents involved in the SEN and disability policy review?			
Is pupil voice considered in decisions about support for those with SEN and disabilities at both individual and school level?			
Are staff well-trained related to SEN and disabilities?			
Does the school have robust systems for identifying pupils with SEND?			



Is there a clear graduated approach for responding to pupil needs?		
Are pupils supported in reaching adulthood (if applicable, can link to careers curriculum).		
SENDCO - Is the SENDCO qualified? - Do they have sufficient administrative support and time to their fulfil responsibilities?		
Documentation - Is the SEND information report up to date and online? - Is there equality information? - Are equality objectives updated? - Is there an accessibility plan (setting out how the school plans to increase access for disabled pupils to the curriculum, the physical environment and to information)		
Notional SEND Budget Are leaders assuring the board that the school's Notional SEND budget is being deployed transparently and directly to improve SEND outcomes?		
Graduated Approach Quality What QA mechanisms (e.g., work drop-ins, learning walks) do leaders use to verify that teachers are actively modifying tasks for SEND support plans?		
Alternative Provision (AP) For SEND pupils accessing off-site AP, how frequently do leaders monitor their attendance, safety, and academic progress?		
Are pupils with SEND achieving well compared to national comparatives?		
Do pupils with SEND and disability have good attendance compared to other pupils and national comparisons?		
Do pupils with SEND participate in: - after school clubs - breakfast club provision - trips/residentials - sporting activities		



Comments arising from discussions and activities:

While the primary focus of the monitoring visit is not Safeguarding, Wellbeing, Health & Safety/Compliance or Leadership these areas remain important and should be taken into account during all Academy visits. Please include any observations that may require the Board's attention.

Safeguarding:

Wellbeing:

Health & Safety/Compliance:

Next Steps / Further Action required:

Evaluation of Visit:

Signed (Academy SENDCO)

**Signed (Academy
Principal/Head of School):**

Signed (Governor):



Sustainability and Climate Action Governor Monitoring Form

Academy:	Date:	Name/Area of Responsibility:	Governor Name:
Reason for Visit: - Strategically monitor the culture, workload management, and mental health provisions within the academy. - Ensure alignment with the DfE Staff Wellbeing Charter and evaluate the impact of pupil wellbeing strategies on school culture.			
Discussions / Outcomes: (Context to be discussed with the Premises Manager) Energy Efficiency Rating / Display Energy Certificate (DEC) Score: Total Energy Expenditures YTD (vs. budgeted energy allocation): Carbon Footprint Metrics: Climate Action Plan Status:			
Agenda (Below are a list of potential activities- delete as appropriate) - Review of the Academy Climate Action Plan / Sustainability Strategy. - Discussion with Premises Manager and Curriculum Lead regarding energy management and green education. - Site walk focusing on waste management systems, energy-saving infrastructure (LEDs, insulation), and green spaces. - Review of supply chain sustainability goals (e.g., catering, transport tenders).			
Potential Questions to ask leaders:			
Discussion Questions	Yes/No/To an extent	Evidence/Commentary	
Climate Action Strategy Does the academy have a clear Climate Action Plan with measurable targets for carbon reduction, waste reduction, and energy efficiency?			
Energy & Resource Efficiency			



What practical measures are being deployed to reduce energy and water consumption, and how are behavioural changes being driven across the school?		
Curriculum Integration How are sustainability, biodiversity, and climate change explicitly woven into the curriculum across different key stages?		
Procurement & Supply Chain Do local procurement decisions take environmental sustainability into account (e.g., catering reducing food miles/single-use plastics, local suppliers)?		
Estates & Biodiversity Are school grounds being utilized effectively to enhance biodiversity and connect pupils with nature?		
Additional Themes to Explore While the primary focus is Sustainability, please note any observations requiring attention: Safeguarding: Do new environmental site adaptations (e.g., solar arrays, outdoor learning zones) introduce new perimeter security risks or access issues? Health & Safety/Compliance: Are sustainability adjustments compliant with structural safety codes (e.g., weight limits for roof-mounted solar panels, legionella management in water butts)?		
Comments arising from discussions and activities:		
Next Steps / Further Action required:		
Evaluation of Visit:		
Signed Leader		



Signed (Academy Principal/Head of School):	Signed (Governor):



Wellbeing Governor Monitoring Form

Academy:	Date:	Name/Area of Responsibility:	Governor Name:												
Reason for Visit: - Strategically monitor the culture, workload management, and mental health provisions within the academy. - Ensure alignment with the DfE Staff Wellbeing Charter and evaluate the impact of pupil wellbeing strategies on school culture.															
Discussions / Outcomes: (Context to be discussed with the Business Manager) Staff Attendance Rate (YTD vs. National Target): _____ Staff Turnover Rate (Current vs. Same Time Last Year): _____ Number of Pupil Suspensions / Behaviour Incidents YTD: _____ Percentage of staff completing the annual/termly survey: _____ Agenda (Below are a list of potential activities- delete as appropriate) - Discussion with the Designated Wellbeing Lead / HR representative. - Review of anonymized staff and pupil survey data trends. - Review of workload reduction strategy actions. - Short discussion with staff representatives (e.g., staff voice panel) regarding workload and support culture. Potential Questions to ask leaders: <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <thead> <tr> <th style="width: 55%; padding: 5px;">Discussion Questions</th> <th style="width: 20%; padding: 5px;">Yes/No/To an extent</th> <th style="width: 25%; padding: 5px;">Evidence/Commentary</th> </tr> </thead> <tbody> <tr> <td style="padding: 10px; vertical-align: top;"> Staff Workload & Policy Impact How have leaders actively reduced staff workload this year (e.g., streamlining marking, data drops, communication policies)? </td> <td style="width: 20%;"></td> <td style="width: 25%;"></td> </tr> <tr> <td style="padding: 10px; vertical-align: top;"> Culture & Psychological Safety Do staff feel confident reporting burnout or mental health pressures early, and what targeted support pathways (e.g., EAP) are utilised? </td> <td></td> <td></td> </tr> <tr> <td style="padding: 10px; vertical-align: top;"> Pupil Mental Health Provision Is there a clear, tiered structure for mental health interventions (e.g., ELSA, counsellors), and do leaders measure the impact of these services? </td> <td></td> <td></td> </tr> </tbody> </table>				Discussion Questions	Yes/No/To an extent	Evidence/Commentary	Staff Workload & Policy Impact How have leaders actively reduced staff workload this year (e.g., streamlining marking, data drops, communication policies)?			Culture & Psychological Safety Do staff feel confident reporting burnout or mental health pressures early, and what targeted support pathways (e.g., EAP) are utilised?			Pupil Mental Health Provision Is there a clear, tiered structure for mental health interventions (e.g., ELSA, counsellors), and do leaders measure the impact of these services?		
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Survey Actions & Feedback Loops What specific changes have been implemented by leadership in direct response to the latest staff or pupil voice surveys?			
Value for Money and Procurement Can leaders evidence that recent contract renewals or resource purchases followed Trust thresholds and delivered maximum impact?			
Additional Themes to Explore While the primary focus is Wellbeing, please note any observations requiring attention: Safeguarding: Are behavioural or workload pressures creating gaps or delays in staff logging safeguarding concerns on CPOMS? Health & Safety/Compliance: Is there an escalation in stress-related risk assessments or accidents related to staff fatigue?			
Comments arising from discussions and activities:			
Next Steps / Further Action required:			
Evaluation of Visit:			
Signed Leader			
Signed (Academy Principal/Head of School):		Signed (Governor):	



Health, Safety and Compliance Governor Monitoring Form

Academy:	Date:	Name/Area of Responsibility: Health, Safety and Compliance	Governor Name:
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Reason for Visit:
 This guide is designed to help school governors strategically monitor health, safety, and compliance within their school. Governors have a responsibility to provide assurance that the school is compliant with statutory requirements, that risks are being appropriately managed, and that the school environment supports safe teaching and learning.

The role is not to manage day-to-day health and safety but to:

- Seek assurance from leaders.
- Review evidence of compliance.
- Ask strategic questions that promote accountability.
- Ensure that statutory duties are met

Key Responsibilities of a Governor in Monitoring Health, Safety, and Compliance:

Understanding the Framework

- Be familiar with statutory requirements (e.g., Health and Safety at Work Act, DfE requirements, safeguarding links).
- Understand which policies are mandatory and how often they are reviewed.

Oversight, Not Operations

- Ensure policies are in place and applied, but do not attempt to carry out staff responsibilities.
- Focus on whether leaders have systems in place, rather than checking the systems yourself.

Monitoring in Practice

- Review reports from the Principal, Business Manager and/or Premises Manager.
- Visit the school with a strategic lens (e.g., reviewing accessibility, signage, and maintenance in general terms).
- Ensure health and safety is a regular agenda item at governing board meetings.
- Confirm that risk assessments are undertaken and reviewed appropriately.

Escalation and Assurance

- Be confident in asking leaders to evidence compliance.
- Escalate any concerns to the full governing board.
- Recognise when specialist advice is required and ensure the school has access to it.

Discussions / Outcomes:
Context- to be pre-populated by the Premises Manager/Business Manager/Principal

Audit Type/Statutory Drill	Date of last audit/run	External or internal?	Number of outstanding actions	Timescales and commentary to resolve
Trust-Commissioned H&S Audit				
Fire Safety Audit				
Fire Alarm Drill (Termly)				
Lockdown Drill (Annual)				



Accident Tracking Dashboard	YTD Total	Tracked in line with Policy?	Summary of Trends and RIDDOR Reportable Incidents
Trust-Commissioned H&S Audit		Y/N	
Fire Safety Audit		Y/N	

Number of accidents YTD and summary of trends	
Training Compliance Rate and summary of reasoning if below 100%	

Agenda (suggested 2 hours)

- Discussion with Premises Manager/Business Manager/Principal (guided by questions below)
- Review recent risk assessments and accident logs and check the Fire Log Book and Accident Recording System to ensure compliance with policy timescales.
- Check completion rates of statutory training
- Review action plans following last Trust-commissioned inspections
- Documentation review (see section below)
- Site walk focusing on condition, compliance signage, emergency procedures

Further potential activities

- Talk with staff regarding H&S awareness and training
- Observe a fire drill/lockdown procedure (if scheduled)
- Review first aid provision and signage around school
- Walk-through check of compliance notices and equipment (fire extinguishers, alarms, etc.)

Discussion questions –	Evidence/commentary
Governors should listen carefully for vagueness, lack of evidence, or delays in compliance . These are red flags that require follow-up, either by asking for written assurance or escalating to the full governing board.	
Leadership and accountability • How do leaders ensure that the actions and recommendations from Trust-commissioned audits are assigned to specific owners and monitored for completion before the deadline? • In what way does the Senior Leadership Team (SLT) review accident trends and drill performance logs before these metrics are presented to the local governing board?" • How are middle leaders held accountable for localized health and safety compliance and risk assessments in their areas of responsibility?	



What mechanisms are in place to ensure that when a key compliance staff member is absent, their statutory checking responsibilities are seamlessly covered?	
Risk and compliance What progress has been made against the actions identified in our last Trust-commissioned H&S audit, and are any items past their target completion deadline?	
Training and culture - How do leaders ensure that all minor and major accidents are recorded strictly in line with Trust policy timescales, and how is this data checked for accuracy before escalating to RIDDOR? - How are staff trained to recognize what constitutes a reportable accident under Trust policy, and how do leaders monitor that logs are completed within required timescales? - Following the latest Trust-commissioned H&S audit, what specific training gaps were identified for staff, and how quickly were those addressed? - How do leaders ensure that temporary, supply, or newly appointed staff are immediately inducted into localized emergency drill procedures (Fire and Lockdown) before they teach their first lesson? - What mechanisms exist for staff to raise H&S or near-miss concerns without fear of recrimination, and how are those concerns tracked to resolution?	
Premises and Accessibility - How did the outcome of our recent Fire and Lockdown drills impact our Premises and Accessibility strategies (e.g., physical escape route modifications or emergency signage visibility)? - Can leaders demonstrate that any physical defects contributing to recent accidents on the school estate have been formally logged, prioritized, and repaired in line with policy? - How regularly do leaders review the physical accessibility of emergency escape routes for pupils with complex SEND or limited mobility (e.g., PEEPs - Personal Emergency Evacuation Plans)? - What is the current backlog of 'Category 1' (urgent safety/compliance) maintenance tasks, and how are local or Trust capital funds being leveraged to clear them?	
Emergencies and safeguarding - Can leaders present the physical or digital evacuation logs for the most recent Fire and Lockdown drills? What specific actions were taken to fix any recorded delays or issues? - How do our emergency evacuation and lockdown plans explicitly account for the safeguarding and physical protection of vulnerable or SEND pupils during an active incident?	



• If a serious accident occurs on site, what is the clear operational line of escalation between the H&S reporting system and the Safeguarding/DSL team? • When was our Critical Incident / Emergency Management Plan last updated, and does it align with the latest feedback from Trust compliance teams?	
Asset Management • Did the recent Trust-commissioned audit flag any statutory compliance failures regarding high-risk assets (e.g., boiler plants, extraction systems, or server networks), and what is the remediation plan? • How do leaders ensure that specialized assets associated with physical safety (such as fire doors, alarm panels, and automated gates) receive scheduled statutory testing in line with policy? • What system prevents unapproved or untested electrical equipment (brought in by staff or contractors) from compromising the safety of the academy's infrastructure? • How are asset replacement lifecycles managed so that aging infrastructure is replaced before it fails a health and safety or compliance inspection?	
Comments arising from discussions and activities:	
While the primary focus of the monitoring visit is not Safeguarding, Wellbeing, Health & Safety/Compliance or Leadership these areas remain important and should be taken into account during all Academy visits. Please include any observations that may require the Board's attention. Safeguarding: Wellbeing: Health & Safety/Compliance:	
Next Steps / Further Action required:	
Evaluation of Visit:	
Signed (Academy Premises Manager)	
Signed (Academy Principal/Head of School):	Signed (Governor):