

# School monitoring visits

## Guidance and checklist for governing boards

Updated October 2025

Monitoring visits help governing boards to see how their plans are being put into action and how board decisions affect daily school life.

They are different to informal visits, like attending events, which, although can be a valuable form of stakeholder engagement and means for governors and trustees to learn more about their school or trust, do not have a strategic purpose.

## Visit focus

Monitoring visits should focus on strategy, not day-to-day operations. In practice, this means:

- looking at how strategic priorities and key policies agreed by the board are implemented
- evaluating progress and checking that planned actions are happening
- gaining assurance that pupils' needs are being met, including in safeguarding and SEND

In many cases, school visits are carried out by a [link governor or trustee](#) given responsibility for monitoring a strategic priority or area of compliance.

Monitoring visits often involve:

- meeting staff responsible for key areas
- talking with staff and pupils
- observing a lesson to better understand the school (not to judge teaching quality)
- looking at examples of pupils' work

There are circumstances where it may be appropriate and more convenient to carry out a virtual visit (virtual meetings or phone calls with staff). However, this cannot replace in-person visits where school life and culture can be experienced first-hand.

### Tips for effective school visits

- If you're new to governance, it may be useful to shadow another visit first or bring an experienced governor/trustee with you for support.
- If you're talking to pupils during your visit, try to make sure this doesn't exclusively favour 'articulate', 'confident' or 'well behaved' pupils. See our [pupil voice guidance](#) for more on this topic.
- Be mindful of school operations – avoid interrupting normal teaching and learning routines if possible.

## Scheduling visits

Work with school leaders and relevant staff to plan your visits around:

- strategic milestones featured in your strategy document and/or school development plan
- timely feedback to board and committee meetings
- avoiding busy periods in school life
- staff and governor/trustee availability and workload

Use our [schedule template](#) to plan well-timed, purposeful visits.

Your board can decide how often governors/trustees visit, balancing monitoring and visibility with minimising disruption. In our view, governors and trustees can expect to carry out monitoring visits two or three times a year.

### Monitoring for MAT trustees

The approach to monitoring activity may be different for trustees in a MAT. Aside from the mandatory link trustee roles, boards may consider assigning trustees:

- to individual schools for monitoring
- specific (link) areas to monitor for all schools

Depending on the MAT's context, trust boards should also consider how it will:

- balance individual school visits with trust-wide monitoring
- coordinate monitoring activity between the relevant trustee and local governors, including sharing information with each other through reports and/or meetings

## Reviewing your approach

We recommend that governing boards review the impact of their school visits, building lessons learned into future plans. Consider:

- Are our visits proving useful?
- What benefits, particularly unexpected benefits, have come from our visits?
- Are we better informed and enabled to make decisions?
- Is there anything we need to change about how visits are conducted, taking into account feedback from school staff?

### School visits e-learning

Subscribers to NGA Learning Link can access an [e-learning module on monitoring visits](#). The module includes an interview with an experienced governor and will help you apply the themes and principles of this guidance to a real-world context.

# Checklist for a successful school visit

To do	Complete?
<b>Before your visit</b>	
<b>Confirm the purpose of the visit, schedule and activities</b> with the headteacher and/or relevant member of staff.	
<b>Review your board's code of conduct</b> as well as the school's policy for visitors (or equivalent).	
<b>Read relevant background information</b> such as the board's strategy, school performance data, policies and stakeholder feedback.	
<b>Think about questions you might ask</b> that are relevant to the focus of your visit – see our <a href="#">example questions</a> .	
<b>During the visit</b>	
<b>Follow the school's procedures</b> such as signing in and producing identification.	
<b>Ask relevant questions</b> that you have prepared and also in response to information learned and observations made on the visit.	
<b>Take notes</b> , making sure everyone's comfortable with this – explain that your notes are for board feedback only, not for judging teaching quality.	
<b>After the visit</b>	
<b>Send a follow up message</b> thanking everyone who supported your visit. You might like to mention a highlight such as excellent pupil behaviour.	
<b>Write a report</b> (see below) detailing what you've learned on the visit and any follow-up required – we have a <a href="#">report template</a> that boards can use.	
<b>Feed back to the board</b> at the next meeting when the report is circulated, briefly summarising your visit and taking any questions from other members.	

When writing the report, we suggest that you:

- set out the agreed reasons for the visit and focus your report on this
- use collaborative language, for example, 'reading attainment in key stage 1 is poor, the school needs to improve this' could be written as 'we discussed the school's strategy to improve reading in key stage 1'
- consider asking an experienced governor/trustee on your board for feedback on your visit report if it's the first time you've written one
- share a draft with the relevant staff member as a courtesy and to get their feedback before sending it to the board