

A guide to school visits

For governors and trustees

April 2021



The expert organisation for school
governors, trustees, clerks and
other governance professionals

Contents

This guide covers four areas:

<u>1. The focus for school visits</u>	<u>4</u>
<u>2. Planning and preparation</u>	<u>4</u>
<u>3. During and after visits</u>	<u>7</u>
<u>4. Reviewing your visits policy</u>	<u>8</u>

National Governance Association

The National Governance Association (NGA) is the membership organisation for governors, trustees and clerks of state schools in England.

We are an independent, not-for-profit charity that aims to improve the educational standards and wellbeing of young people by increasing the effectiveness of governing boards and promoting high standards. We are expert leaders in school and trust governance, providing information, advice and guidance, professional development and e-learning.

We represent the views of governors, trustees and clerks at a national level and work closely with, and lobby, UK government and educational bodies.

Introduction

Monitoring visits provide governing boards with essential information about how their strategy is being implemented and how issues discussed at board level translate into the everyday life of the school.

Visiting school on a planned, regular basis allows governors and trustees to:

- better understand their school's strengths and areas for development
- determine if agreed policies and procedures are working in practice
- identify how resources are being used
- show staff and pupils that they are interested in school life, work and achievements
- experience the culture and ethos of the school

School visits can cover several activities, such as:

- meeting staff with leadership responsibility for specific areas, such as safeguarding or SEND
- talking to staff and pupils
- experiencing a lesson being taught (as part of getting to know the school, rather than making judgements about quality of teaching)
- seeing examples of pupil work

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. The NGA Knowledge Centre provides more information and advice about the [role of link governors and trustees](#).

Purpose of this guide

This guide explains the purpose of school visits and includes advice on what to do before, during and after visits. This guide should help all governors and trustees to:

- ensure your visits are well planned and focused on school or trust priorities
- make the most of visits and ensure they have a positive impact

Useful school visits resources

NGA members can [visit the Knowledge Centre](#) to download a model school visits policy, template visits report and template visits schedule. These documents should be adapted to meet the needs of your school.

1. The focus for school visits

Monitoring visits should have a strategic rather than operational focus. In practice, this means visits should focus on:

- Strategic priorities and key policies agreed by the governing board.
- The evaluation of progress: are the things people say are happening actually happening?
- Seeking assurance that the needs of pupils are being met (such as safeguarding and SEND).

There may be opportunities to visit your school on an informal basis, such as attending performances or events. Whilst these visits are valuable, they are not a substitute for scheduled visits with a clear focus linked to strategic priorities.

Understanding strategic and operational roles

The respective roles of strategic governance and operational management are explained in our guidance [What Governing Boards and School Leaders Should Expect from Each Other](#).

Our guide to [Being Strategic](#) helps boards develop an annual cycle for creating, monitoring and reviewing their strategy.

2. Planning and preparation

2.1 Scheduling visits

Governing boards should plan a schedule of visits for each academic year – our [template visits schedule](#) can be adapted for this purpose. When making these plans, boards should consider:

- Strategic milestones (things that the board expects to have happened) – these should be outlined in the school improvement plan or trust strategy document.
- How the visits schedule fits with the schedule of board and committee meetings, to allow for timely feedback and discussion.
- How to avoid visits clashing with important events and/or busy periods in school life.
- The workload implications for staff who are likely to be involved in the visits.
- The board's own capacity to fulfil the schedule: is it manageable?

The schedule of visits should be agreed between the governing board, school leaders and relevant staff. This will help ensure that the timing of visits allows governors/trustees to see relevant activities.

2.2 School visits policy

The governing board should adopt a policy which sets out how visits are to be conducted and explains what you should do prior to, during, and after a visit. NGA's [model school visits policy](#) can be adapted to suit your needs.

2.3 Pre-visit planning

Visits are more effective when governors and trustees prepare in advance. This preparation might include:

- Reading and familiarising yourself with your governing board's policy for visits and the expected conduct.
- Reading and familiarising yourself with your school's policy for visitors (this is different from the governor/trustee visits policy) that includes relevant health, safety and safeguarding instructions.
- Reading background information relating to the focus of the visit, such as relevant section(s) of the strategic plan, performance data, policies, stakeholder information.
- Clarifying the purpose of the visit with the head teacher and or relevant member of staff.
- Confirming the visit schedule and activities.

Questions to ask on school visits

NGA has developed suggested [questions for governors and trustees to ask](#) – you may wish to refer to these examples when constructing your own questions, specific to your context and the issue you are discussing.

2.4 Virtual visits

School visits are an opportunity for you to meet with staff, pupils and other stakeholders, helping you get to know your school and build relationships.

However, there are circumstances where it may be appropriate and more convenient to carry out a virtual visit. This has been a necessary approach for all boards during the COVID-19 pandemic and usually involves meeting with a member of staff and or pupils by video conference.

When planning a schedule of visits, governing boards should be aware that, whilst some areas of focus lend themselves to virtual visits, this does not allow governors and trustees to readily experience school life, culture and ethos first-hand – it is not possible to carry out effective monitoring without regular in-person visits to the school site.

Virtual visits should be planned in much the same way as in-person visits and might consist of:

- virtual meetings or phone calls with staff
- experiencing school life virtually (perhaps attending events like virtual assemblies)

Chairs should talk to school leaders about what a practical and appropriate approach to virtual visits might be. You can [read more in our guide](#) to virtual governance.

2.5 Frequency of visits

Governing boards are best placed to determine how often and when their visits should take place, with the aim of balancing board visibility and minimising disruption for the school.

In most cases, governors and trustees can expect to carry out monitoring visits at least twice a year. In large MATs, visits will likely be carried out by those governing at local level, whilst the trustees remain visible in other ways (for instance, through newsletters).

School visits e-learning

Subscribers to NGA Learning Link can access an [e-learning module on governance 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.

3. During and after visits

3.1 During a visit

Governors and trustees are usually accompanied on their visits by a relevant member of staff to help guide their monitoring, answer questions and clarify learning points or lines of enquiry. When visiting the school in a governing capacity you should:

- Arrive in good time and follow the school's procedures (such as signing in and producing identification).
- Adopt a friendly approach that puts everyone at ease.
- Be respectful of the school at work and if you wish to take notes, check that those you are with are comfortable with this.
- If you are taking notes, be clear with everyone that this is for feedback purposes and that you are not recording judgements (for example on the quality of their teaching).
- Ask relevant questions that are closely linked to the purpose of your visit.
- Acknowledge the staff and pupils you meet.

3.2 After a visit

Following a visit to school, you may wish to:

- Send a follow up message thanking everyone involved in supporting your visit for their time and assistance.
- Emphasise the positive aspects (such as the behaviour of the pupils, welcoming atmosphere) with the CEO/headteacher and or relevant member of staff who acted as your guide.

3.3 Reporting back to the board

The impact of visits is increased when the learning is shared through structured feedback to the governing board.

As soon as possible following a visit, use any notes you have taken to complete a report on your visit. Your board will likely have a template report in place – you can [download our template report here](#).

Your report should detail the key learning points, discussion points for the governing board, the follow-up required, and next steps. When writing your report, we suggest that you:

- Use neutral, collaborative language to describe what you observed (for example, *'reading attainment in key stage 1 is poor, the school needs to improve this'* could be written as *'we have discussed the school's strategy to improve reading in key stage 1'*).
- Detail the agreed reasons for the visit and focus your report around this.
- Consider asking an experienced governor for feedback on your report.
- Send a draft of your report to the relevant staff member as a courtesy and to invite feedback before circulating more widely.
- Submit your report in line with your visits policy – ask your clerk for help if you're unsure.

You may also need to give oral feedback on your visit at a future board or committee meeting.

4. Reviewing your visits policy

We recommend that governing boards review the impact of their school visits when reviewing their policy, building lessons learned into future plans and considering:

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

Thank you for reading this guide. If you have any feedback you'd like to share, please email kcfeedback@nga.org.uk.

More from NGA

Knowledge Centre: best practice guidance

NGA members get exclusive online access to best practice school governance guidance from NGA's Knowledge Centre. Go to [NGA's Knowledge Centre](#) and log in to browse and download guidance, templates, model policies, information summaries and more.

GOLDline: bespoke advice

NGA's [GOLDline advice service](#) provides independent and timely advice to governing boards with GOLD membership. Our advisers guide members through topics including governance roles and responsibilities, admissions, exclusions, complaints, and board constitution.

Find out more about [NGA GOLD membership](#) and sign up.

Don't miss out on membership benefits

If you're an NGA member, check your account details are correct by logging in at nga.org.uk and visiting the account management page. Every member of your governing board needs an up-to-date account to access benefits including our Governing Matters magazine and weekly e-newsletter. If you don't have an account or you're not sure, talk to your clerk or chair or [contact us](#).

Learning Link: e-learning anytime



NGA Learning Link provides cost-effective, comprehensive training for governors, trustees, chairs, and clerks. Learning Link subscribers can access more than 50 engaging modules 24/7.

NGA governing boards can purchase Learning Link at discounted prices. Learn more about [subscribing to Learning Link](#).
