ZENITH
MULTI ACADEMY
TRUST

GOVERNOR MONITORING VISITS & GOVERNOR/MEMBER & TRUSTEE ALLOWANCES POLICY

Approved by:	Board of Trustees
Date:	September 2025
Last reviewed on:	September 2025
Next review due by:	September 2027

1. Introduction

1.1 The function of school governance at all levels can be broken down into 3 key areas:

i. Holding the Headteacher and leaders to account for school performance.
ii. Wider strategic decisions.
iii. Finances.

1.2 At Zenith, we are incredibly grateful to everyone who gives up their valuable time to support our schools and the Trust in its important work. Without this willingness to volunteer and contribute to the greater good our schools simply could not function, and your engagement both in terms of challenge and support is greatly appreciated.

1.3 More specifically in relation to providing challenge and support personal observations made on school visits are a major source of information. The experience involves teamwork, directed towards a common goal, founded upon good relationships with staff.

1.4 Visiting increases understanding and assists informed judgement in order to improve the quality of decision making, and ultimately the overall effectiveness of a school. Rightly, Ofsted expect regular visits to triangulate policy, understand strengths and weaknesses of the school, and ascertain the quality of the lived experience for pupils/students and staff in school.

2. Purpose of Visits

2.1 All visits need a clear purpose, which forms part of this policy. The purposes of a visit may include:

- Knowing more about the work and organisation of the school in practice.
- Getting a feel for the ethos of the school.
- Keeping up-to-date with developments.
- Offering visible support.
- Implementation of the school development plan and reviewing its success.
- Enabling Governors & Trustees to form a view on the performance of the school and how that fits together with the school's improvement priorities.
- Meeting with groups of pupils/students to understand their lived experiences in school.

2.2 Two key mechanisms at Zenith for discharging governance responsibilities involve visits to look at school logs, and also the school/Trust data dashboard, which is produced on a monthly basis. To support this work, especially for new Governors or those without an education background, resources are distributed to Chairs of Governors and webinars are also uploaded to Zenith Institute to explain these systems. Most notably, the webinar entitled "Providing Professional Challenge".

2.3 It is crucially important to make clear in advance the status of a visit to school, when undertaken on behalf of the Local Governing Body/Local Advisory Group/Trust Board.

2.4 Governors & Trustees are not inspectors or advisers: it is not their job to assess the professional competence of individual teachers.

3. Guidelines

3.1 Our practice in schools is:

- Governors & Trustees will be asked to align themselves with individual areas or priorities at the first Local Governing Body/Local Advisory Group/Trust meeting in the Autumn term.
- Clear objectives and intentions will be shared and agreed before any visit with the link member of the senior leadership team and or Headteacher.
- To take into consideration that a visitor's presence may affect proceedings.

4. Visit report

4.1 It is vital that a record is kept of any visit, and Ofsted rightly expect to see a selection of such visits to ensure Governors & Trustees are discharging their responsibilities.

4.2 Following a visit, Governors/Trustees should therefore complete a pro-forma report (see appendix A as a model example). Schools are free to adapt or amend the form to best suit their needs, as long as there is always a clear focus for any visit.

4.3 Governors/Trustees should share their report with their link member of the senior leadership team and/or the Headteacher/CEO and return it to the clerk for distribution to the next Local Governing Body/Local Advisory Group/Trust Board meeting.

4.4 It is important to take care in the use of language, and be mindful of the audience, as well as respecting confidentiality. This is especially important in relation to Parent Governors/Trustees.

4.5 Only a Governor/Trustee having had the appropriate checks and training may visit a school to undertake monitoring, including any online visits/meetings.

4.6 If, at any time, any Governor/Trustee requires any special assistance or adaptation due to a disability or impairment, they should contact the Headteacher or CEO as soon as possible.

5 Checklist for visiting the school

5.1 The Governor/Trustee should:

- Follow this policy.
- Complete the visit form as required.
- Ensure that they make at least one visit to report on their area to the Local Governing Body/Local Advisory Group/Trust Board. Re: safeguarding, there is a more structured schedule to follow.
- Agree an explicit purpose and plan for each visit which is communicated to all parties,
- Consider different styles of visit, for example paired visits where an experienced Governor/Trustee partners a less experienced one.
- Handle and co-construct sensitively meetings with pupil/student groups with the Headteacher or member of the SLT. Information on this is also available on the webinar titled "Providing Professional Challenge".

5.2 Individual Governors/Trustees should:

- Negotiate a mutually convenient time with the link leadership team member/Headteacher/CEO to ensure that the visit is expected.
- Introduce themselves to the relevant member of staff.
- Make a point of listening, rather than only talking.
- Be polite, tactful and sensitive.
- Ensure that positives as well as "even better ifs" or concerns are noted.
- Talk to the pupils/students and observe the learning.
- Include a debriefing session with the member of the senior leadership team/CEO which should include any concerns that have arisen during the visit. N.B. Where there are any concerns relating to a safeguarding issue these must be immediately referred to the school's designated safeguarding officer/or Headteacher/or CEO. This must happen before leaving the premises. Should neither be accessible, the relevant link member of SLT should be notified.
- Avoid stressful periods such as during or just before an Ofsted inspection.
- Visit at different times of the day, term, year.
- Discuss with the member of staff the purpose of the visit before observing their practice.
- Try to attend at least one special occasion, especially if daytime visits are difficult. Special occasions are an excellent way to support the school and experience the enjoyment that being a school Governor or Trustee can provide. Sometimes these can also provide useful insights to feedback on "even better ifs". However, it is important that the positives are not lost in such events, as these are an important part of what makes a school a good school.

5.3 Individual Governors/Trustees should not:

- Go in to the school unannounced.
- Act as an inspector.
- Interfere with the organisation of a class or activity.
- Try to talk to the teacher while they are teaching – wait until the end of the lesson.
- Criticise the performance of a teacher, even in a constructive manner during your visit.
- Make promises to staff or pupils/students on behalf of the Local Governing Body/Local Advisory Group/Trust Board, or act as an advocate after the visit.

5.4 What you can expect from the staff and pupils/students:

- To be treated courteously.
- To have your questions answered.
- To know that any staff being visited will be informed in advance.
- To be thanked for your time.

6. Monitoring and review

6.1 The Trust Board will review the policy every year in the Autumn term.

7. Expenses

7.1 Governors, Trustees and Members may claim allowances to cover expenditure necessary to enable them to perform their duties.

7.2 This does **not** include an attendance allowance, or payment to cover loss of earnings.

7.3 Governors, Trustees and Members may claim allowances by completing a claim form which can be obtained from the school/Trust and submitting it to the finance department.

7.4 Allowances can only be paid on the provision of a receipt.

7.5 Mileage claims must be accompanied by a VAT registered fuel receipt, indicating that duty has been paid on sufficient fuel for the distance covered (approximately 27% of the mileage claimed) in order for the Trust to be able to reclaim VAT.

7.6 Governors, Members and Trustees may claim for:

- Travel and subsistence costs
- Telephone charges, photocopying, postage, stationery, etc.

7.7 Claims will be paid in arrears on a case-by-case basis. Reimbursable costs (other than travel and subsistence costs) should be agreed in principle by Chair of Governors, or in the case of a Trustee and Member the CEO, in-line with financial regulations, **before** they are incurred.

7.8 The Chair of Governors (or the Vice-Chair, where appropriate), or the CEO, may investigate claims that appear excessive or inconsistent. All claims will be subject to an independent audit.

7.8 Travel expenses where a Governor, Trustee, or Member uses their own vehicle are paid at HMRC approved mileage rates.

8. Conclusion

Zenith Trust and all our schools recognise the invaluable contribution those responsible for governance make to our educational provision. We are incredibly grateful for your willingness to engage and support, and should you ever have any questions which you feel uncomfortable talking to in-school staff about, namely around expenses or procedural aspects of this policy, please contact Claire Day (Governance Professional) who can liaise with the CEO or Chair of the Trust as required.

Appendix A

GOVERNOR VISIT

Governor(s):	**Staff:**
Date:	
Purpose of Visit:	

School Development Plan/focus	**Progress**	**Evidence and further action**

Check List for Governor School Log Visits
2025/26

- **Where a parent governor is assigned to a log, great care needs to be taken re whether this is appropriate due to confidentiality/anonymity etc**
- **The LADO log must not be cross checked by a parent governor and names should be anonymised**
- **No records should be removed from the school site**
- **Schools must be mindful of GDPR**

Name of log	Frequency	Possible lines of enquiry
Accident log	x 1	Location; Type of accident; Repeated incidents; Dangerous near misses; Increases/decreases; Actions taken; Follow ups (possibly go and see one example in person); Up to date? Type of actions taken re specific incidents; General actions taken to address trends
Alternative provision log	x 2	As per new policy checklist, e.g. safeguarding checks in place; has the pupil been visited etc.; Increases/deceases; Good outcomes (qualifications/destinations etc) for students leaving AP?

Name of log	Frequency	Possible lines of enquiry
Anti-bullying log	x 2	Patterns re location of bullying; Time e.g. start of term; Patterns re student population of victim/perpetrator e.g. SEND/age/gender/MA/PP etc; Type of bullying e.g. cyber/transphobic; Repeat offenders; Is follow up recorded? Increases/decreases; Type of actions taken re specific incidents; General actions taken to address school trends; Possible cross check one student/pupil file to follow through a thread.
Anti-racist log	x 1	Patterns re location of racism; Time e.g. start of term; Patterns re student population of victim/perpetrator e.g. SEND/age/girls/ethnicity/MA/PP; Type of racism e.g. cyber/transphobic; Repeat offenders; Is follow up recorded? Increases/decreases; Type of actions taken re specific incidents; General actions taken to address school trends; Possible cross check one student/pupil file to follow through a thread.

Name of log	Frequency	Possible lines of enquiry
Complaints log	x 1	Patterns e.g. type/subject area/age etc; Increases/decreases; Follow up; Number of complaints; Escalated or recurring complaints.
Suspension/isolation log	x 1	Patterns re student population of student/pupil e.g. SEND/age/gender/MA/PP; Any over represented groups e.g PP? Individual actions and the general actions taken re cohorts; Repeat offenders; Compare suspension rates to national figures on school IDSR; Type e.g. sexual violence and harassment, racism etc.
LADO referral log	x 1	Is it up to date? Have follow up actions been noted; Any patterns? (this is likely to be a very small log and therefore the primary check is that it exists and actions noted); Has notification occurred within 24 hours? Does the school have a low-level referral log in addition?

Name of log	Frequency	Possible lines of enquiry
Pupil movement log (previously called off-roll log)	x 2	Up to date? Reasons for home ed and actions taken to prevent; If home ed - has LA been notified re safeguarding duty of care? Patterns e.g. reason, year groups times of year; Are students/pupils being taken off-roll to attend an alt provision (**this is not allowed, they must remain dual registered**); If moving to a new school - has the new school been contacted to check they have arrived? If student/pupil is on child protection register - has that file been sent separately to the main file, and within 5 working days?
School trips	x 1	Not a log but a periodic check if an audit trail for a school trip would be of value: Are all policy requirements evident; Have relevant trips been approved on EVOLVE? Are risk assessments in place etc
Sexual violence & harassment log	x 1	Patterns re location; Patterns re student population of victim/perpetrator e.g. SEND/age/gender/MA/PP; Type of incident (e.g. verbal, sexting etc); Repeat offenders; Actions taken e.g. was alleged perpetrator removed from alleged victims lessons; Are none being recorded (why? DfE is clear this happens in all schools); Type of actions taken re specific incidents; General actions taken to address school trends; Possible cross check one student/pupil file to follow through a thread.

Name of log	Frequency	Possible lines of enquiry
Single central record	x 3	This can usefully be done with the school HR lead; Any gaps in any column? Are all groups of staff included e.g. ; contractors/supply/full time/part time/volunteers etc; Has the school got written confirmation of alternative provision DBS checks and teacher training confirmation. Trainees have their own section on the SCR. Normally the training provider will provide DBS information in advance and schools sight the certificate and ID etc prior to commencement. No staff starting without all checks complete or relevant risk assessment in place Section 128 checks done All checks are dated and name/initials of the person who conducted the check is noted
Restraint log	x 1	Patterns re: lessons/year groups/SEND, etc. Evidence of follow up in pupil files Were parents informed?
Reduced provision log	x 2	Has LA been notified for each timetable reduction? Have parents agreed? Have the reductions been reviewed? Patterns re: SEND, PPG, year groups, etc. Is the provision being used to manage behaviour? **(It should not)**
Referral to Hub/Police log	x 1	Patterns re: increases/decreases/year groups Taking one referral – does it follow through to the CP files? Are actions followed up/timely?