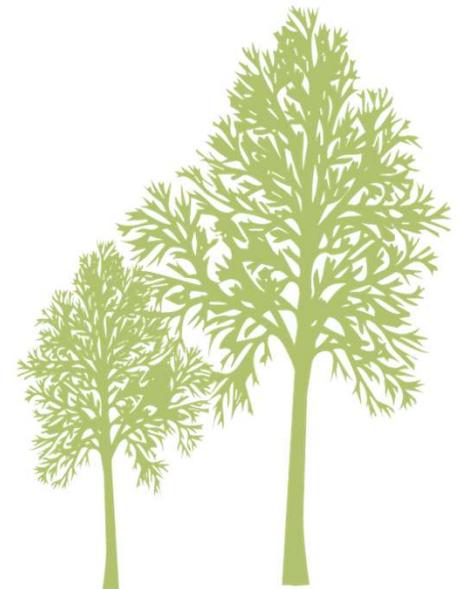




Developing an effective monitoring plan

September 2025



Aims of the session

To equip local governors with the knowledge, skills, and tools to monitor school improvement priorities effectively

Clarify the strategic nature of the monitoring role

Demystify what effective monitoring looks like

Provide practical strategies and templates to support local governors in fulfilling their delegated responsibilities

How can we help?

What's going well so far
and what do you need
support with?



Group activity

Why is monitoring so important for local governors?

What happens when it's done well — or not at all?

**Does your LGB
currently have a
monitoring plan
in place?**



- The Trust Board is the strategic decision-making body of the Trust – it delegates certain responsibilities to the Trust’s executive leadership and local governing boards via the scheme of delegation.
- LGBs should focus on local provision and the school contextually.
- The Trust Board remains responsible and accountable for the performance of all schools.

Monitoring is the process by which local governors strategically check that the school is enabling all to flourish within the framework of the Trust's priorities and the scheme of delegation



Monitoring is:

- Focused on school priorities
 - Strategic and evidence-based
 - Conducted through planned activities (visits, discussions, reviewing reports, analysing data)
 - A key part of holding school leaders to account
 - Being professionally curious
-



Monitoring is not:

- Day-to-day management
 - Staff performance review
 - Making operational decisions
 - A checklist activity
 - Knowing information about individual staff members, children or families
-



Local governors must stay strategic. This means:

- Asking questions about impact, not how the job is done
 - Focusing on what is being achieved, not how it's delivered
 - Monitoring outcomes and compliance, not managing people
-

Strategic – local governor role	Operational – School leader role
Monitors the impact of policies	Implements policies
Monitors the school improvement plan	Delivers the improvement plan
Analyses impact and outcomes	Decides teaching strategies
Reviews safeguarding compliance	Manages daily safeguarding procedures
Monitors the school’s risk register	Identifies and manages risk

Group activity

Which of these activities do you think are sometimes mistakenly done by local governors and why?

Have you ever found yourself crossing from strategic into operational? What caused it? How could it be avoided?



Features of an effective local governor monitoring plan

- Aligned to the School Development Plan (SDP)
 - The monitoring plan should directly reflect the priorities identified in the school's improvement plan
 - Every monitoring activity should be linked to an SDP objective or key area of school performance (e.g., attendance, reading, behaviour, SEND, disadvantaged pupils)
-



Features of an effective local governor monitoring plan

Monitoring activities should be SMART:

- Specific – focused on a clearly defined area
 - Measurable – tied to data or outcomes
 - Achievable – realistic within the time and capacity available
 - Relevant – connected to school/trust priorities
 - Time-bound – planned within specific timeframes
-



Features of an effective local governor monitoring plan

Clear roles and responsibilities

Named local governors should be assigned to specific areas (e.g., safeguarding, Pupil Premium, SEND)

Structured timeline

Monitoring should be scheduled across the academic year to avoid clustering or gaps

Activities should align with key milestones (e.g., data drops, audits, pupil progress reviews)

A termly or half-termly view allows governors to build momentum and revisit progress

The plan should identify who is responsible for each activity (e.g., link governor, chair, committee lead)



Features of an effective local governor monitoring plan

Strategic, not operational

The plan must keep monitoring activities at the strategic level—focused on outcomes, provision, and compliance—not day-to-day management

Monitoring should involve reviewing evidence and asking questions, not conducting inspections or making teaching decisions



Features of an effective local governor monitoring plan

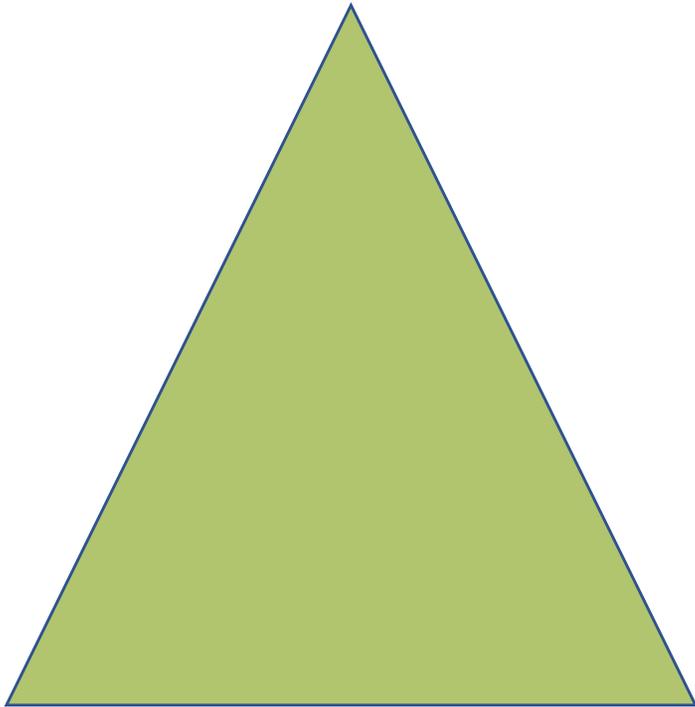
Evidence-informed activities

The plan should incorporate a variety of evidence sources, including:

- Data (e.g., attendance, progress, exclusions, budget)
- Reports from school leaders
- Pupil/staff/parent voice
- Governor visits and observations (not lesson judgements)

A strong plan will triangulate evidence, increasing accuracy and credibility.

What we are told



What we
see for
ourselves

What other
information
tells us/confirms

The most important thing to remember is why you are monitoring or being professionally curious – what is the purpose?

What are you going to be professionally curious about?



HT report to governors



**Finance and Premises
Report to LGB**



**Regional Effectiveness
Lead and Quality
Assurance Lead NoV**



Policy monitoring



Book looks



Learning walks



**Through a
committee**



**Pupil
conferencing**



**Meeting with school
staff**



**Questionnaires and
surveys**



Remember TED...

- Tell Me
- Explain
- Describe





Features of an effective local governor monitoring plan

Clear outcomes and reporting expectations

For each monitoring activity, the expected outcome or success criteria should be stated.

The plan should specify how findings will be recorded (e.g., using a visit report template) and how they will be reported back to the full local governing board or committee.

Compliance with delegated responsibilities

It should cover key delegated responsibilities such as:

- Safeguarding
 - SEND
 - Curriculum and assessment
 - Pupil Premium / disadvantaged pupils
 - Health and safety
-

**IMPACT! IMPACT!
IMPACT!**





Features of an effective local governor monitoring plan

Reviewed and adapted regularly

The plan should be a live document, reviewed each term

Activities should be adjusted based on changes to priorities, Ofsted outcomes, data trends, or emerging risks



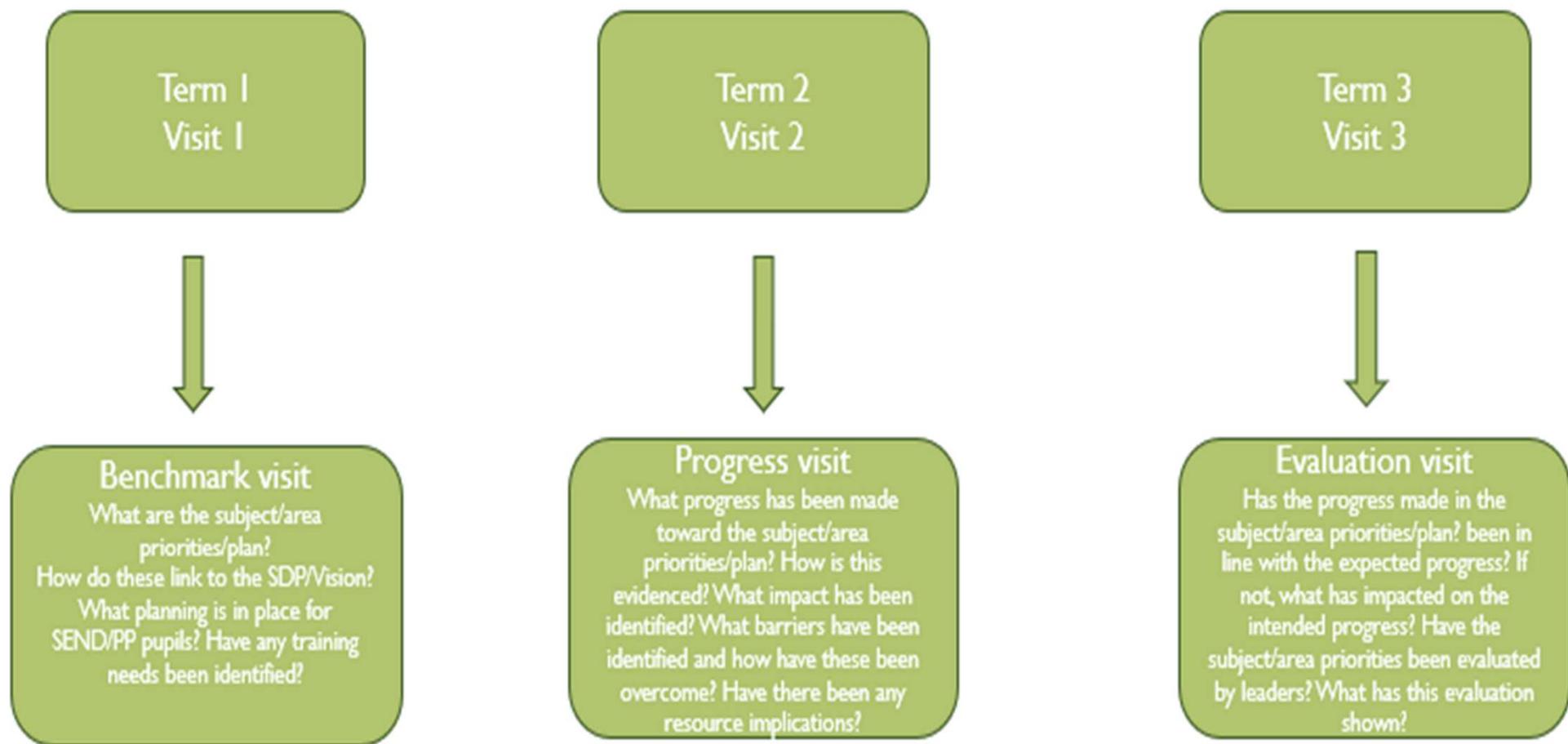
Review of monitoring plans

In breakout groups, review three sample monitoring plans

- What do you like about these plans?
- What are the even better ifs?



Suggested subject/area monitoring visit plan





Subject Leader Handbook

August 2025

Our vision is to enable all to flourish.



6: Governor report and action plan

XXXX subject summary

Strengths:

Curriculum sequencing	
Quality of teaching	
Work scrutiny	
Pupils feedback	
Assessment and outcomes	
Teachers' feedback including subject knowledge	
Impact of school's distinctive vision on the curriculum	

Weaknesses:

Curriculum sequencing	
Quality of teaching	
Work scrutiny	
Pupils feedback	
Assessment and outcomes	

The key features of an effective monitoring plan...

- It exists!
- It is owned and developed by all local governors
- It reflects the school's development priorities
- It is purposeful
- It is time-sensitive
- It includes a range of monitoring activities
- It identifies the impact wanting to be achieved
- It is shared with all staff
- It is realistic
- It is a live document, often referred to and adapted as needed

Role of the LGB – monitoring delegations suggested activity

School Effectiveness						
Decide		Decide - Has primary responsibility for decision making related to the decision or action.				
Consulted		Consulted - Will be consulted as part of the process of completing a task. Their contribution may inform the approach or decision.				
Deliver		Deliver - Accountable for: undertaking particular tasks; following agreed policies and procedures; ensuring appropriate training of staff.				
Monitor		Monitor - Responsible for reviewing whether a task or action is being carried out satisfactorily and, where appropriate, requiring action to be taken to ensure task is delivered appropriately.				
Decision/Action	Members	Trust Board	Executive leadership team	Local governing board	Headteacher	
SE.1	Monitor, review and challenge the outcomes of groups of pupils Including SEND, pupil premium, EAL.		Decide Monitor	Monitor	Monitor	Deliver
SE.2	Ensure high quality support and provision for looked After Children and Previously Looked After Children		Monitor	Deliver Monitor	Monitor	Deliver
SE.3	Ensure a curriculum is implemented which is broad and balanced and is designed to promote educational excellence for pupils		Monitor	Monitor Consulted	Monitor	Decide Deliver Monitor

We are really confident we are doing this and can evidence doing so.

We are confident we are doing this but cannot evidence doing so.

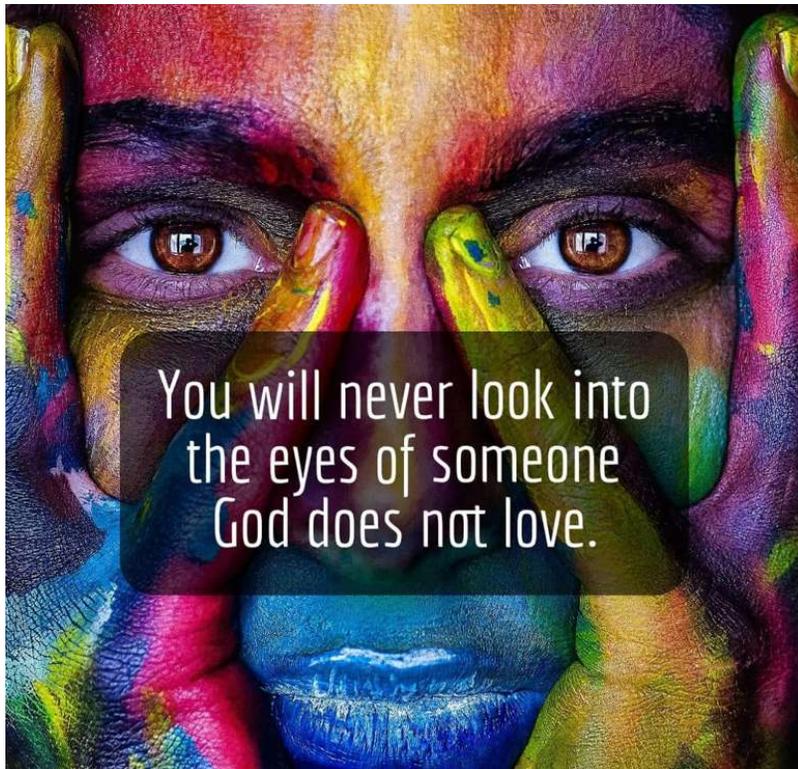
We are not doing this currently



The most important thing to remember is why you are monitoring or being professionally curious – what is the purpose?

Flourishing

#strongertogether



What more do you
need from us to
enable you to
flourish in your
monitoring role?

Any final questions?





Nicki Wadley
Chief Operating Officer
nwadley@cen.dgat.org.uk

Vicki Cowan
Governance and HR Officer
vcowan@cen.dgat.org.uk

