### Title
- **Governor Service Visit Guidelines**

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Governor Service Visit Guidelines

1. Background

1.1. It is recognised that visits to Trust services may be beneficial for some governors in order to provide an insight into operational service areas and to inform questions and discussions in the Council of Governors. They do not, however, represent an obligatory component of the governor role.

1.2. There is a need to ensure that these visits take place in a coordinated fashion to prevent any unintentional inconvenience being caused to staff and patients.

2. Governor Service Visit Guidelines

2.1. A set of guidelines for the arrangement of governor visits to clinical areas has been developed, based on a similar document which is employed by Northamptonshire Healthcare NHS Foundation Trust. These guidelines are attached as an Appendix.

2.2. A draft of this document has been shared with the Trust’s clinical divisions to seek comment and to check that as far as possible such visits and the arrangements for them would not cause disruption to patient care.

3. Recommendation

3.1. The Council of Governors is asked to note the attached guidance regarding the arrangements for governor visits to clinical services.
Appendix

Governor Service Visits Guidelines

1. Introduction
   1.1. These guidelines have been produced to support governors in undertaking service visits.
   1.2. The opportunity to take part in service visits is offered to governors but there is no expectation that all governors will choose to participate in them or that they represent an obligatory component of the governor role.

2. Purpose of Service Visits
   2.1. The opportunity to visit Trust services is presented to governors:
       • To provide opportunities for insight into operational service areas;
       • To provide opportunities to listen to the views of and engage with people using the Trust’s services, carers and staff; and
       • To inform questions and discussions in the Council of Governors.
   2.2. Visits should be regarded primarily as an opportunity for governors to learn more about Trust services and facilities and issues around service delivery. They should not be used to provide direction to Trust staff outside established management structures.

3. Organisation of Visits
   3.1. Visits will be arranged/coordinated through the Executive Assistant to the Non-executive Directors and Governors (linda.oliver@ouh.nhs.uk / 01865 221184) who will hold a “matrix” of service areas and recent history of visits.

4. Selection Criteria for Service Area Visits
   4.1. The Executive Assistant to the Non-executive Directors and Governors will hold information about areas which have been suggested by divisions as particularly appropriate for visits.
   4.2. Governors will also be able to suggest or request their own choice of service area to be visited. If a service has been visited by one of the following in the past 6 weeks, the FT Office will suggest that an alternative area is selected for a visit:
       • Governors
4.3. Governors and non-executive directors may choose to conduct visits together or independently of each other. The FT Office will facilitate either option at the request of governors / non-executive directors.

5. Feedback Mechanisms

5.1. For each service visit, governors are invited to produce a short note detailing key observations and comments.

5.2. The commentary should highlight both positive points and any issues of potential concern which may prompt a question to the Trust through the Council of Governors. Before finalising the note, the governor should provide an opportunity for the manager responsible for the service area (ideally during the visit itself) to respond to any issue of concern so that the note is informed and balanced.

5.3. The Executive Assistant to the Non-executive Directors and Governors will hold copies of a service visit proforma (Appendix) which governors may choose to use.

5.4. The note will be submitted to the Executive Assistant to the Non-executive Directors and Governors who will send it to the operational manager and/or director for the area, inviting responses as appropriate.

5.5. The note will be retained by the Executive Assistant to the Non-executive Directors and Governors and forwarded to the Trust’s Quality Team to allow it to be considered alongside other evidence of patient and staff feedback. The Director of Clinical Services and the Director of Nursing will also be sent a copy of the feedback.

5.6. The number and location of service area visits will be routinely reported at the Council of Governors.

6. Guidelines for Governors Visits

6.1. All service area visits must be arranged via the Executive Assistant to the Non-executive Directors and Governors. There should be NO unannounced visits to service areas.
6.2. A minimum of two people will be present at visits, one of whom will be a member of Trust staff. Governors should at no time be unaccompanied in a clinical area. This includes staff governors if they are on a governor visit.

6.3. For some service area visits it may be necessary to limit the number of governors who are able to attend in consultation with the staff responsible for the relevant area(s).

6.4. There is no formal dress code for service area visits, but all governors must dress appropriately for the service area they are visiting.

6.5. Both governors and Trust staff should wear ID badges to aid identification and formal introductions will be made at the start of the visit.

6.6. When entering a patient area governors should adhere to the infection control procedures appropriate to that area, which may include hand washing and having arms ‘bare below the elbows’.

6.7. If an unannounced inspection takes place by an external agency (e.g. CQC) during a visit, the governor visit will be immediately suspended and may be re-arranged for another time.

6.8. Where clinically appropriate, governors should be able to visit all parts of the service area they are visiting. This will be guided by Trust staff on the day of the visit.

6.9. Where this does not interrupt the delivery of care, governors will be given the opportunity to meet and talk with both patients and staff during the service area visit.

6.10. If governors are visiting a service area not on governor business they should not be wearing their Trust ID badge, unless they are a staff governor.

6.11. A document has been produced on the role of governors that can be provided to the service area prior to the visit by way of briefing.

Neil Scotchmer
Foundation Trust Programme Manager

October 2015
Appendix

Visits to Service Areas by Governors: Feedback Form

Service Area visited: ________________________________________________

Location: _________________________________________________________

Date and time of visit: ____/____/201_ ____:____ AM / PM

Visit undertaken by: _________________________________________________

Short description of visit:


Key observations and comments:


Signed: _______________________________ Date: ________________