



Abbey Multi Academy Trust **Policies & Procedures**

School Visits Policy for Governors and Trustees

Practical guidance for governor and trustee visits

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Approved by	Abbey MAT Board of Trustees
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School Visits Policy for Governors and Trustees

1. Purpose and scope

This policy sets out the expectations for governors and trustees when visiting Abbey Multi Academy Trust (the Trust) academies. Visits help governors and trustees understand the work and life of the school, see how agreed priorities and policies are being implemented, and bring informed strategic discussion back to the relevant board or committee.

Governors and trustees visit as invited guests and as representatives of the relevant board, not as individuals. Their role is to observe, ask appropriate questions and gather information for strategic oversight. They are not inspectors and must not become involved in the day-to-day management of the school.

Visits should normally link to the school development plan, trust priorities, statutory responsibilities or an agreed area of governance focus. This policy applies to planned governance monitoring visits, focused context visits, remote governance visits, and school event or community visits where appropriate.

2. Principles for visits

Governor and trustee visits should be purposeful, proportionate and supportive. They should strengthen relationships between governance, leadership, staff and pupils, while protecting staff time and maintaining clear professional boundaries.

Visits should help governors and trustees to:

- understand the strengths, context and priorities of the academy
- see policies, improvement priorities and agreed actions in practice
- hear appropriate staff and pupil voice
- recognise and celebrate success
- identify questions or themes for board-level discussion
- support effective accountability without interfering in operational decisions

Visits must not be used to:

- assess the quality of teaching or judge classroom practice
- comment on the performance of individual staff or pupils
- pursue a personal agenda, complaint or interest
- check on a governor's or trustee's own child or family member
- raise concerns publicly or in the moment in a way that undermines staff authority

- form part of any staff performance management process

Where a governor or trustee has a relevant conflict of interest, including a close personal or family connection, this should be declared and managed before the visit is agreed.

3. Types of visit

Governor and trustee visits normally fall into one of the following categories. The type of visit should be agreed in advance so that everyone is clear whether the visit is for governance monitoring, contextual understanding, remote discussion, or attendance at a school event.

Type of visit	Purpose	Examples
Governance monitoring visit	A planned meeting or discussion with a relevant leader or member of staff about an agreed governance priority, statutory duty or area of responsibility.	Safeguarding, SEND, health and safety, curriculum, attendance, behaviour or school development priorities.
Focused context visit	A planned visit around part of the school, accompanied by a member of staff, to help governors or trustees understand how an agreed priority, policy or approach is reflected in practice.	Visiting agreed areas of school, seeing learning environments, understanding routines, or hearing appropriate staff and pupil voice.
Remote governance visit	A planned telephone or video discussion where an in-person visit is not necessary or practical.	Review discussion with a staff lead, follow-up conversation, document review, or preparation for a future visit.
School event or community visit	Attendance at a school event or activity. This is not usually treated as a governance monitoring visit unless a specific governance purpose has been agreed in advance.	Assemblies, performances, celebrations, services, school fairs, volunteering, or events attended as a parent/carer.

4. Visit programme

Governors and trustees will carry out visits in line with the annual governance monitoring programme. The programme should be agreed by the relevant board

or committee and should reflect trust priorities, academy priorities and statutory responsibilities.

Role / focus	Activity	Frequency
Safeguarding link governor/trustee	Monitoring visit with relevant safeguarding lead and annual report to the relevant board or committee.	Termly, with annual review
SEND / inclusion link governor/trustee	Monitoring visit with relevant staff lead, linked to agreed priorities.	At least termly or as agreed
Health and safety lead	Monitoring visit with relevant staff lead and reporting to trustees/board as agreed.	Termly, with annual review
Priority / curriculum / link governors	Visits linked to school development priorities or agreed board focus.	As set out in the annual programme
All governors and trustees	At least one appropriate focused context visit, assembly, school activity or agreed school event.	Annually
Chairs	Keep-in-touch meetings with the relevant school or trust leader.	Half-termly or as agreed

This schedule may be adapted to suit the academy context, the board's agreed monitoring priorities and leadership capacity. Additional visits may be agreed where there is a clear governance purpose.

Examples of annual governance visit programmes from schools can be obtained from the Trust governance team.

5. Before a visit

Before arranging a visit, governors and trustees must:

- notify the chair and the relevant trust or academy leader before scheduling the visit
- agree the purpose, focus and intended outcome of the visit in advance
- make sure the visit links to an agreed priority, statutory responsibility or board responsibility
- arrange the date, time and duration with the relevant member of staff, being mindful of staff workload

- share any proposed questions and the visit record form in advance
- complete any relevant pre-reading, including previous reports, policies or school development information
- be familiar with the school's safeguarding, confidentiality and visitor procedures
- declare and manage any conflict of interest before the visit takes place

6. During a visit

During the visit, governors and trustees must act in a way that is professional, courteous and proportionate. They should:

- arrive on time, sign in and follow all visitor, security and safeguarding procedures
- wear the appropriate visitor badge or identity lanyard
- follow the agreed schedule and remain focused on the agreed purpose of the visit
- be friendly, professional and respectful of the working school environment
- ask open, non-judgemental questions such as "What is working well?", "How do you know?" and "What are the next steps?"
- check with the teacher or member of staff before speaking with pupils
- capture pupil voice only where this has been agreed and is appropriate to the focus of the visit
- avoid recording pupil names or asking pupils to comment on individual members of staff
- be present in a way that does not distract staff or pupils from their primary role
- thank staff and pupils for their time

Governors and trustees must not:

- comment on individual lessons, teaching styles, classroom management or specific incidents
- judge the performance of staff or pupils
- interfere with the day-to-day running of the academy
- raise concerns in the moment unless there is an immediate safeguarding or health and safety concern
- become involved in personal, parental, staff or pupil grievances
- behave in a way that could make staff feel inspected, for example observing from the back of a classroom with a clipboard without an agreed purpose

Any immediate safeguarding or health and safety concern must be reported at once in line with the academy's procedures. Other questions or concerns should be recorded and discussed with the relevant leader, chair or governance professional after the visit.

7. After a visit

After the visit, the governor or trustee should briefly reflect on what was learned, whether the visit met its agreed purpose and what should be taken back to the relevant board or committee.

The visit record should be completed as soon as reasonably practicable while the visit is fresh. It should:

- use neutral, factual and observational language
- focus on the agreed purpose of the visit and its strategic relevance
- record themes, examples and questions rather than naming individual pupils or making judgements about staff
- include relevant staff voice and pupil voice where appropriate
- identify any points for clarification or future board discussion
- avoid including confidential or personal information unless there is a clear governance need and it is handled appropriately

Once complete, the report should normally be shared in the following order:

1. a more experienced governor or trustee for feedback, where the visitor has been in post for less than one year
2. the relevant staff member, as a courtesy and to check factual accuracy
3. the relevant trust or academy leader, as a courtesy
4. the chair of the relevant board or committee, copying the clerk and the Trust governance team for storage in the agreed governance records system

Reports should be considered by the relevant board or committee as part of its normal monitoring cycle. They should support strategic discussion, triangulation and assurance, rather than operational decision-making.

8. Monitoring, review and training

The Trust Board will review and approve this policy annually. The Trust Governance Professional will be responsible for drafting the policy, coordinating the annual review process and making any amendments required during the year.

The Trust's Chairs' Group will be consulted during the year to provide feedback on how the policy is working in practice and to suggest amendments where needed.

Any proposed changes will be considered as part of the Trust's normal governance review arrangements.

The effectiveness of the visit programme will be reviewed regularly by the relevant board or committee. Boards and committees should consider whether visits are purposeful, proportionate and useful, and whether they are helping governors and trustees to understand academy strengths, risks and priorities.

When reviewing the policy and the visit programme, governors and trustees may consider:

- Are visits linked clearly to the school development plan, trust priorities or statutory responsibilities?
- Are reports helping the board or committee ask better strategic questions?
- Are staff clear about the purpose of visits?
- Is appropriate pupil voice being captured safely and usefully?
- Are visits supportive and manageable for staff?
- Are any changes needed to the schedule, visit forms or guidance?

New governors and trustees should receive this policy as part of induction and should discuss visit expectations with the chair before undertaking their first visit. They should also be given access to appropriate previous visit reports as examples of good practice.

Appendix 1 – Governor/Trustee Visit Record Form

Use this form for governance monitoring visits, focused context visits, remote governance visits, and school event or community visits where there is an agreed governance purpose. Attendance at a school event, celebration, performance, service, assembly or community activity will not always require a full visit record; however, this form should be used where the visit is intended to provide assurance, inform board or committee discussion, or capture relevant learning linked to the board's agreed priorities. Keep the report concise, factual and linked to the agreed purpose of the visit.

Name and role of governor/trustee	
Academy visited	
Staff member(s) involved	
Date and time of visit	
Type of visit	☐ Governance monitoring visit ☐ Focused context visit ☐ Remote governance visit ☐ School event or community visit ☐ Other
Agreed focus of visit	
Link to school development plan / trust priority / statutory duty	
Relevant follow-up from previous visit or board discussion	
Questions shared in advance	
Summary of activities / areas visited	
Staff voice / discussion themes <i>Record themes only. Do not name individual staff unless needed for factual accuracy. Keep separate from evidence seen or reviewed.</i>	
Pupil voice – key themes from discussion <i>Record themes only. Do not name pupils. Do not ask pupils to comment on individual staff.</i>	
What did I learn about this area? <i>Link back to the agreed focus of the visit.</i>	
Evidence seen or reviewed, and evidence of impact / strengths <i>Separate what was seen or reviewed from themes discussed. Include positive examples and how the school knows its actions are making a difference.</i>	

What evidence from this visit demonstrates the school is living up to its vision? <i>For all schools, explain how the evidence shows the school's stated vision and values in practice. For Church of England schools, include reflection on how the evidence shows the school living out its Christian vision. Keep comments evidence-based and linked to what was seen, heard or reviewed during the visit.</i>	
Questions or points for clarification	
Points or actions for board or committee consideration, if any <i>Keep this strategic, not operational. If no action is required, state "no action required".</i>	
Points or actions for board or committee consideration, if any <i>If yes, summarise the point briefly.</i>	
Did the visit meet its agreed purpose? <i>Briefly note what worked well and what, if anything, would improve future visits.</i>	
Confidentiality and safeguarding check <i>Confirm that the report does not include pupil names, unnecessary personal information, or comments on individual staff or pupil performance.</i> ☐ Confirmed	
Any suggested focus for a future visit	
Leader / staff factual accuracy comments, if any <i>This section may be used to record factual corrections or clarifications. It is not intended to change the governor's or trustee's independent record of the visit.</i>	
Signed by governor/trustee	Date
Shared with staff member / leader for factual accuracy	Date
Received by clerk / governance team	Date

Reminder: Once completed, the visit record should be shared with the relevant staff member for factual accuracy and must always be sent to the relevant trust or academy leader. It should then be sent to the chair of the relevant board or committee, copying the clerk and the Trust governance team (governance@abbeytrust.org), so that it can be stored in the agreed governance records system and used to inform strategic discussion at the next appropriate meeting.

Appendix 2 – Exemplar completed Governor/Trustee Visit Record

This exemplar shows the level of detail and tone expected in a completed visit record. It uses neutral, factual and evidence-informed language. It is intended as an example only and should be adapted to the agreed purpose, context and focus of each visit.

Name and role of governor/trustee	A. Example, Safeguarding and Inclusion Link Governor
Academy visited	Example Academy
Staff member(s) involved	Senior leader for inclusion; designated safeguarding lead; attendance lead
Date and time of visit	15 October 2026, 9.30am to 11.00am
Type of visit	☒ Governance monitoring visit ☐ Focused context visit ☐ Remote governance visit ☐ School event or community visit
Agreed focus of visit	To understand how leaders identify and support pupils who are persistently absent or at risk of persistent absence, including pupils with SEND and pupils who may be vulnerable.
Link to school development plan / trust priority / statutory duty	School development priority: improving attendance and reducing persistent absence. Trust priority: inclusive practice and early identification of barriers to learning. Statutory link: safeguarding and attendance duties.
Relevant follow-up from previous visit or board discussion	At the previous board meeting, governors asked how leaders know whether attendance interventions are timely and whether families understand the support available.
Questions shared in advance	How do leaders identify pupils whose attendance is declining? How are barriers understood, particularly for pupils with SEND or known vulnerabilities? What evidence do leaders use to evaluate whether interventions are improving attendance? How is information shared with governors without identifying individual pupils unnecessarily?
Summary of activities / areas visited I met with the senior leader for inclusion, the designated safeguarding lead and the attendance lead. We discussed the school's graduated approach to attendance, how pupils are identified for support, and how leaders use attendance information alongside safeguarding, SEND and pastoral information. I reviewed anonymised attendance tracking information and examples of the school's attendance intervention records.	

Staff voice / discussion themes

Leaders described a clear process for reviewing attendance patterns and considering the wider context for pupils and families. Staff explained that attendance is discussed regularly alongside pastoral, safeguarding and SEND information so that support is not considered in isolation. Leaders were able to describe how they distinguish between general attendance concerns and cases where absence may indicate wider vulnerability or unmet need. Staff also described the importance of building trust with families and using supportive conversations before escalation where appropriate.

Pupil voice – key themes from discussion

Pupil voice was not included in this visit because it was not part of the agreed purpose. Leaders explained that pupil voice is gathered through existing pastoral and inclusion processes where appropriate and is considered alongside other information when identifying barriers to attendance.

What did I learn about this area?

The school has systems to identify attendance concerns early and leaders are using professional conversations and first-hand knowledge of pupils to understand context. The approach appeared proportionate and inclusive, with leaders considering whether attendance barriers relate to SEND, safeguarding, wellbeing, family circumstances or wider school engagement. Leaders were clear that improving attendance is not only a compliance issue but is linked to pupils' access to the curriculum, personal development and wellbeing.

Evidence seen or reviewed, and evidence of impact / strengths

I reviewed anonymised attendance tracking information, an example intervention timeline and the school's summary of attendance actions for the current term. These showed that leaders monitor attendance regularly, identify pupils whose attendance is declining, and record actions taken. Leaders could explain why different approaches are used for different pupils, rather than applying a single response to all cases. A strength was the link between attendance, inclusion and safeguarding oversight, which supports leaders to consider barriers and risk together. Further evidence over time would help governors understand whether interventions are consistently improving attendance for different groups of pupils.

What evidence from this visit demonstrates the school is living up to its vision?

The visit provided evidence that the school's theologically rooted Christian vision is shaping its culture, decisions and daily practice. Leaders described attendance as part of the school's wider commitment to enabling all pupils to flourish, rather than simply as a compliance measure. The joined-up work between attendance, safeguarding, SEND and inclusion showed that leaders are attentive to pupils' individual contexts and are seeking to remove barriers to learning, belonging and wellbeing. The evidence reviewed suggested that the school's Christian vision is being lived out through inclusive and compassionate practice, where pupils and families are treated with dignity and support is adapted in response to need. This provides evidence of the vision having practical impact on the life of the school and on the way leaders seek to serve their community.

Questions or points for clarification

For the next report to governors, it would be helpful to clarify how leaders evaluate whether specific interventions have made a difference and whether any groups of pupils require a different or more targeted response. Governors may also wish to understand how family engagement is reviewed where attendance remains a concern despite support.

Points or actions for board or committee consideration, if any

The board should continue to receive attendance information that helps it understand patterns, context and impact, not just headline percentages. It may be useful for a future report to show how leaders evaluate attendance interventions over time and how this links to safeguarding, SEND and inclusion oversight.

Is there anything that should be highlighted verbally at the next board or committee meeting? Yes. Governors should note the strength of the joined-up approach between attendance, inclusion and safeguarding. The board may also wish to ask how leaders will evidence the impact of interventions over the academic year.	
Did the visit meet its agreed purpose? Yes. The visit provided useful assurance that leaders have systems for identifying and supporting pupils with attendance concerns and that they are considering pupil context when deciding next steps. Future visits could usefully include a review of impact over time, once more data is available.	
Confidentiality and safeguarding check ☒ Confirmed.	
Any suggested focus for a future visit A future visit could consider whether attendance interventions are having a sustained impact for pupils who have previously been persistently absent, and whether leaders can identify any groups for whom additional support may be needed.	
Leader / staff factual accuracy comments, if any Example comment: Factual accuracy confirmed. Leaders noted that the next attendance report to governors will include a short section on intervention impact and follow-up actions.	
Signed by governor/trustee	Date
A. Example	16 October 2026
Shared with staff member / leader for factual accuracy	Date
Senior leader for inclusion and academy leader	17 October 2026
Received by clerk / governance team	Date
Trust governance team	18 October 2026