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Abbey Multi Academy Trust

POLICIES & PROCEDURES

School Visits Policy for Governors & Trustees

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School Visits Policy for Governors and Trustees

1. Purpose and Scope

This policy sets out guidelines for governors and trustees when visiting Abbey MAT academies. Visits are vital to maintaining robust accountability, transparency, and engagement while aligning with the relevant board's strategic priorities. This policy ensures visits are productive, non-intrusive, and contribute to continuous improvement.

Governors and trustees visit as invited guests; they are observers, not inspectors, and visits must always align with the school development plan and strategic goals.

2. Principles for Visits

Visits aim to:

- Observe policy and strategic plan implementation
- Gather insights into the school environment and community
- Support strategic priorities without interfering in operational matters

Visits must not:

- Assess teaching quality
- Interfere with management of the school
- Serve personal agendas

Governors and trustees are required to act in the best interests of the school and trust as a whole.

Governors and trustees will not use visits as an opportunity to:

- ***Check on the progress of their own children:*** It is recommended that governors and trustees do not visit classes in which they have children or family members.
- ***Pursue a personal agenda or that of a particular group:*** All governors and trustees serve on behalf of the board as a whole and are not representatives for any group of individuals (e.g. staff, parents), regardless of the category of their appointment.

For those governors and trustees who wish to spend time in a classroom, they will make it clear about their purpose in doing so.

3. Visit Types

Governors and trustees will carry out regular school visits to meet the board's statutory obligation to monitor the school's effectiveness.

There are 2 types of visit:

1. Formal Monitoring Visits

Focused discussions on specific areas with designated staff.

Example: Monitoring progress on safeguarding or SEND priorities.

2. 'On the Ground' Visits

General observation to gain a sense of the school's environment.

Example: Touring the school with a staff member to assess the atmosphere and interaction among staff, pupils, and resources.

Virtual Visits

In cases where in-person visits are not feasible, virtual visits can be arranged. These must:

- Comply with data protection (UK GDPR) requirements when sharing documents for review
- Use secure telephone or video conferencing tools
- Be arranged at a time which is mutually convenient for the governor/trustee and member of staff
- Follow safeguarding protocols

4. Visit Programme

Governors and trustees will conduct school visits based on the following annual schedule:

Role	Activity	Frequency
Health & Safety Lead	Monitoring visit with staff lead	Termly
	Submit Annual Review Report to Trustees	Annual Review in Autumn term
Safeguarding Lead	Monitoring visit with staff lead	Termly
	Submit Annual Review Report to Trustees	Annual Review in Autumn term
Improvement Priority Leads	At least 2 visits to monitor strategic goals	Twice per academic year
All Governors and Trustees	At least one 'On the Ground' visit and participation in a school assembly or activity	Annually
Chairs	'Keep in Touch' meetings with the relevant school/trust leader	Half-termly

5. Pre-Visit Guidelines

Governors and trustees must:

- **Notify Relevant Parties:** Inform the chair and the trust/school leader before scheduling a visit, even if they will not be involved in the visit. They should be made aware as a matter of courtesy
- **Schedule the Visit:** Schedule an appointment with relevant members of staff to ensure visits are scheduled for times that are mutually convenient, being

sensitive to the numerous demands staff have on their time. Generally, visits are more productive when conducted during a school day

- **Clarify the Purpose:** Define how the visit links to strategic goals and share this purpose with the chair, the trust/academy leader, and relevant member of staff ahead of the visit. If the governor/trustee wishes to visit a classroom, this should be agreed with the academy leader so that all parties can be clear about the purpose of the visit.
- **Prepare:** Ask for specific information required in advance of the visit and undertake any other pre-reading required, such as reviewing related policy documents or guidance material.
- **Share the Agenda:** Send a list of questions and the report template with the person to be visited in advance so everyone can feel properly prepared. (Part 1 must be completed to include the focus of the visit and any questions to be raised).

Pre-Visit Checklist:

- Confirm logistics (time, location, staff availability)
- Review safeguarding policies and procedures
- Ensure no conflicts of interest, particularly regarding personal relationships

6. During the Visit

Governors and trustees must:

- Arrive on time, wearing their identity badge and lanyard and dressed appropriately, bearing in mind the standards of dress set for teachers and pupils
- Follow the agreed schedule and remain professional but friendly
- Ask open-ended, non-judgmental questions such as "What's working well?" or "What challenges are you facing?"
- Check with teachers before speaking to pupils
- Pass on any concerns raised by those they speak with to the relevant people
- Respect confidentiality and follow safeguarding policies and procedures

Governors and trustees must not:

- Pass comment on individual staff or student performance, classroom practice, or any specific incidents that occur; this includes critiquing teaching styles or classroom management
- Interfere with the day-to-day running of the school, or engage in operational management
- Behave in a manner that would make staff feel that they are there to inspect, e.g. sit at the back of the classroom with a clipboard
- Raise concerns in the moment. Governors and trustees should note down any concerns they may have and raise them with the chair or trust/academy leader after the visit

7. After a Visit

Governors and trustees will complete the appropriate visit report template promptly:

- Monitoring Visit (Appendix A)
- 'On the Ground' Visit (Appendix B)

In completing the report, governors and trustees will ensure to:

- Use neutral language at all times
- Remain observational, and describe only what they see
- Focus closely on the agreed reasons for the visit, and its strategic role

Once complete, governors and trustees will submit the report for feedback and approval in the following order:

1. A more experienced governor for feedback - if they've been in place for less than 1 year
2. The relevant staff member, both as a courtesy and to check for accuracy
3. The relevant trust/academy leader, as a courtesy
4. The chair of the relevant board or committee, copying in the clerk and the Trust's governance team (governance@abbeytrust.org) for upload to the Governors' Virtual Office (GVO)

Copies of reports will be stored in the Visits section of the Governors' Virtual Office and shared with the papers at the relevant board's next meeting for review.

8. Measuring Effectiveness

Governors and trustees will:

- Evaluate the impact of visits through regular feedback sessions with leaders
- Use visit outcomes to inform board discussions and strategic planning
- Review the visit program annually to ensure alignment with governance goals

9. Training and Preparation

New governors and trustees will receive:

- A copy of this guidance
 - A mandatory induction on visit protocols from the chair before undertaking their first visit
- Access to copies of previous visit reports to understand best practice

Appendix 1: Monitoring Visit Report

Formal monitoring visits are where you discuss the progress of the school/trust in a particular area with the relevant staff member.

PART 1 – Visit Plan:

Name and role of governor/trustee and academy visited:	
Staff (names and roles):	
Date and time of visit:	
Agreed focus of visit:	
Relevant objective or priority: <i>Link to strategic plan / school development plan / vision</i>	
Questions to ask: <i>Note specific questions you want to ask based on the objective or priority, or points to follow up on from a previous visit. Share these questions with the staff member you are visiting in advance, so they can prepare.</i>	

PART 2 – Visit Record:

Summary of activities undertaken:

What have I learned about what the school/trust is doing in relation to this area?

Tips:

- *In the meeting, ask open questions beginning with 'what', 'how', 'when', 'how often', 'why', 'who' and 'where'*
- *Do not be afraid to clarify any terms or acronyms you're not familiar with*
- *Remember you are not there to pass judgement on staff or inspect them – you remain an observer*
- *When writing the report, use neutral language and do not name individual teachers and pupils*

How do I know the school's actions are having an impact in this area? (Link this back to focus of visit and objective/priority given above)

Remember:

- *Include specific evidence that demonstrates the positive impact the school is having in this area*
- *Where a positive impact has not been made yet, note down why that is and what steps are being taken to make progress*
- *Add any further evidence you would like to see to help you make a better assessment of the impact*

Aspects I would like clarified / questions I have:

Actions for the governing board to consider:

Any other comments/ideas for future visits:

Signed: _____ (Governor / Trustee)

Following completion of this form, including accuracy/courtesy checks with relevant staff, please send this form to the Clerk (please CC governance@abbeytrust.org into the email) for publication via the GVO.

Appendix 2: 'On the Ground' Visit Report

'On the Ground' visits are where you will go around the school with the relevant staff member to get a feel for a particular area. You are likely to talk to a range of staff members and pupils.

PART 1 – Visit Plan:

Name and role of governor/trustee and academy visited:	
Staff (names and roles):	
Date and time of visit:	
Agreed focus of visit:	
Relevant objective or priority: <i>Link to the school development plan / strategic plan / vision</i>	
Questions to ask: <i>Note specific questions you want to ask based on the objective or priority, or points to follow up on from a previous visit. Share these questions with the staff member you are visiting in advance, so they can prepare.</i>	

PART 2 – Visit Record:

General notes from discussions with staff: <i>Tips:</i> • On the visit, ask open questions beginning with 'what', 'how', 'when', 'how often', 'why', 'who', 'where', and 'can you show me...' • Do not be afraid to clarify any terms or acronyms you're not familiar with • Remember you are not there to pass judgement on staff or inspect them – you remain an observer • When writing the report, use neutral language and do not name individual teachers and pupils

General notes from discussions with pupils: <i>Remember:</i> • Ask teachers before asking a pupil questions • Do not ask them for views on a specific member of staff • Do not record pupil names
General notes on the school environment and atmosphere <i>Note:</i> • Whether the governors'/trustees' vision of the school is replicated on the ground • Any issues with the school site you see e.g. broken equipment or lack of resources
What successes stood out on the visit and why?
Aspects I would like clarified / questions I have:
Actions for the governing board to consider:
Any other comments/ideas for future visits:

Signed: _____ (Governor / Trustee)

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