



Governance: Schools Visit Policy

Review Due:	September 2029
Last Review	September 2026
Applicable to:	All Trust Schools
Reviewed By:	AC
Approved By:	Board of Trustees September 2026

Comments:

Policy updated to reflect the DfE Academy Trust Governance Guide (updated July 2026), the Academy Trust Handbook 2026 and Keeping Children Safe in Education 2026. Changes strengthen the distinction between governance assurance and operational monitoring, clarify delegated authority, safeguarding escalation, stakeholder voice, conflicts of interest and the purpose of visit reports.

Contents

1. Context.....	2
2. Governor Visits.....	2
3. Trustee's Visits.....	5
4. Safeguarding.....	6
Appendix 1: Example Template report for a monitoring visit.....	7
Appendix 2: Example Template report for a learning walk.....	8

The Board of Trustees of The Partnership Trust have agreed this policy therefore this policy applies to all schools within The Partnership Trust.

1. Context

- a. In order to be effective, Trustees need an appropriate understanding of the schools within the Multi Academy Trust (the Trust), their Local Governing Committees (LGCs), their communities and how the Trust's strategy is operating in practice.
- b. The Trust Board has collective accountability and responsibility for the Trust. It determines which governance functions, if any, are delegated to the local tier through the Trust's Governance Plan and Scheme of Delegation.
- c. Local Governors exercise only those governance functions delegated to the LGC by the Trust Board. Individual Governors and Trustees have no authority to make decisions, give instructions to staff or require changes as a result of a visit.
- d. Governors need to know their school(s) and understand the local context. Visits during the school day are one way of gaining assurance and context. Other sources include policies, data, reports from leaders, stakeholder feedback and information presented to the LGC.
- e. Monitoring visits are one source of evidence only. They provide a snapshot and must be considered alongside the wider evidence available to the LGC or Trust Board.

2. Governor Visits

2.1 Aims and definitions

This policy sets and maintains the standards of conduct expected of Governors when visiting a Trust school. Governors do not have an automatic right to enter a school; visits take place by agreement as part of the Trust's governance arrangements.

It sets out the procedure Governors are expected to follow when undertaking assurance visit activity and reporting their findings to the LGC.

The aim is to ensure visits have a clear strategic purpose, contribute appropriately to governance assurance and are productive and proportionate for Governors, staff and pupils.

2.2 Guidance and Scope

This policy takes account of the DfE Academy Trust Governance Guide, the Academy Trust Handbook, Keeping Children Safe in Education 2026, and the Trust's Governance Plan and Scheme of Delegation.

Governors are observers, not inspectors. Through pre-arranged activity with a clear focus, Governors may:

- consider how agreed policies, priorities and actions are being implemented in practice;

- seek assurance about progress against relevant school improvement priorities and delegated responsibilities;
- gather appropriate evidence and context to support discussion at LGC meetings; and
- where appropriate, hear the views of pupils and staff in relation to the agreed focus.

Governors will not:

- assess the quality of an individual teacher's teaching or make judgements about individual staff performance;
- manage the school or interfere in day-to-day operations;
- give instructions to staff or require changes during or following a visit;
- investigate complaints, personnel matters or safeguarding concerns; or
- treat evidence from a single visit as a complete or representative picture of the school.

2.3 Collective responsibility, objectivity and stakeholder voice

Governance authority rests collectively with the Trust Board and, where functions have been delegated, with its committees. An assurance visit does not confer additional authority on an individual Governor.

Governors should consider whether any personal, professional or other interest could affect, or reasonably be perceived to affect, their objectivity. Any potential conflict should be discussed with the LGC Chair and/or Governance Manager before the visit. Governors should not normally monitor provision directly involving their own child.

Where appropriate to the agreed focus, Governors may gather the views of pupils and/or staff. Discussions should be structured around the monitoring focus, handled sensitively and considered alongside other evidence. Governors must not ask pupils or staff to comment on the performance of an individual member of staff and must not record pupils' names in visit reports.

2.4 Purpose of Governor assurance activity

The purpose of Governor assurance activity is to enable the LGC to obtain assurance in relation to governance functions delegated to it by the Trust Board. Assurance activity should be planned in advance and agreed with the Headteacher, who can advise on appropriate activities, evidence and staff involvement.

Monitoring may include:

- **Formal assurance visits** – discussion with relevant leaders or staff about progress in an agreed area, supported where appropriate by evidence such as plans, data, anonymised examples of pupils' work or stakeholder feedback.
- **Learning walks** – a planned walk around the school, accompanied by an appropriate member of staff, to provide context and support understanding of an agreed priority. A learning walk is not a lesson observation or inspection.

Possible assurance visit focuses may include safeguarding; vulnerable pupils; SEND and inclusion; attendance; behaviour; quality of education; curriculum; personal development; health and safety; and priorities identified through the School Improvement Plan or Trust governance arrangements.

Visits also help Governors understand the school's ethos, context and community, and demonstrate to staff that Governors take their responsibilities seriously. They should complement, not duplicate, professional school improvement, leadership or inspection activity.

2.5 Protocols for Governor Visits to The Partnership Trust Schools:

- Governors are expected to undertake monitoring activity during the year in accordance with the LGC's agreed monitoring schedule and any link role allocated to them. The nature and frequency of activity will reflect delegated responsibilities, school priorities and the Committee's assurance needs as well as the Trust's governance model
- The LGC should review and agree its programme of assurance activity annually, ensuring that visits are proportionate, aligned to delegated responsibilities and focused on the areas of greatest strategic importance and risk.
- Governors should conduct themselves in a manner that promotes positive and professional relationships with staff, pupils and stakeholders. Assurance activities should be supportive, respectful and focused on governance responsibilities. Governors should be mindful of the time demands placed on school leaders and staff and seek to minimise unnecessary burden
- Visits must have a clear, agreed focus and should be arranged in consultation with the Headteacher and, where relevant, other appropriate staff.
- Governors undertaking assurance activity must have completed appropriate induction and safeguarding training before carrying out assurance activity independently.
- If a Governor will spend time in a classroom or learning environment, the purpose, timing and nature of the activity must be clear to the member of staff in advance.
- Governors must follow the school's visitor, confidentiality, data protection and safeguarding procedures, sign in and wear the required identification.
- Information obtained during visits must be treated confidentially and used only for legitimate governance purposes. Governors must not discuss information obtained through visits outside appropriate governance forums unless authorised by the school's Headteacher or Trust Governance Manager to do so
- Governors should prepare by reading relevant information and agreeing appropriate questions in advance where helpful.
- Governors should be friendly and professional, minimise disruption and remain focused on the agreed purpose.
- Photographs, video or audio recording should not be taken
- Any ordinary monitoring queries or concerns should be discussed with the Headteacher after the visit. Governors should not challenge or raise concerns with individual staff in the moment, unless immediate action is required to protect a child or another person from harm.
- Governors must not pursue concerns directly with individual members of staff after the visit.

2.6 Reporting and follow-up

Governors should complete a brief written report as soon as reasonably practicable using the agreed Trust template. The report should:

- use neutral, factual and observational language;
- focus on the agreed purpose and its strategic relevance;
- record the evidence shared or observed and how it contributes to the LGC's assurance;
- avoid naming pupils or making judgements about individual members of staff;
- identify where further information or evidence may be required; and
- record agreed follow-up actions or questions for clarification.

The draft report should be shared with the relevant staff member and Headteacher to check factual accuracy, then with the Chair as appropriate, before being submitted to the governance professional for circulation or inclusion in the LGC papers.

Where the LGC requires further assurance, this should be pursued collectively through the LGC and the Trust's agreed governance arrangements rather than by an individual Governor acting independently.

3. Trustee's Visits to Schools

3.1 Context and Purpose

The Trust Board operates at a strategic level and has collective accountability and responsibility for The Partnership Trust as a whole. The Trust Board delegates specified governance functions to Local Governing Committees through the Trust's Governance Plan and Scheme of Delegation.

Trustees are not paired with individual schools and there is no expectation that Trustees routinely undertake school assurance visits. The Trust's governance model seeks to maintain an appropriate distinction between the strategic role of the Trust Board, the role of the Executive Team and the monitoring and assurance responsibilities delegated to Local Governing Committees.

Trustees obtain assurance about the performance and operation of the Trust through a range of sources, including Board and committee reports, Trust-wide data, Executive Team reports, internal and external assurance, Local Governing Committee reporting and other information presented to the Board.

3.2 Trustee visits to Trust Schools

There may be occasions when Trustees visit a Trust school. This may include:

- attending a Trust Board or committee meeting held on school premises;
- attending a Trust event, celebration, conference or other organised activity;
- participating in a specific visit or activity agreed by the Trust Board, Chair or Chief Executive;
- gaining appropriate contextual understanding of an aspect of the Trust's work; or
- visiting as part of Trustee induction or development.

Such visits are not formal assurance visits and should not be used by individual Trustees to inspect, evaluate or hold individual schools or school leaders to account.

Where a Board or committee meeting is held at a school, there may be an opportunity for Trustees to meet school leaders, staff or pupils or to have a short tour of the school. This is intended to support Trustees' contextual understanding of the Trust and its schools and should not be regarded as a monitoring or inspection activity.

3.3 Protocol for Trustee Visits

Where Trustees visit a school in their capacity as a Trustee:

- arrangements should normally be made through the Chief Executive or Trust Governance Manager;
- Trustees must follow the school's safeguarding, confidentiality and visitor procedures;
- Trustees should maintain an appropriate strategic perspective and should not become involved in the operational management of the school;
- Trustees should not make judgements about the performance of individual members of staff or the quality of teaching on the basis of a visit;
- Trustees should not give instructions to school staff or seek to resolve operational matters directly;
- any significant concern arising from a visit should be raised with the Chief Executive and/or Chair of Trustees, as appropriate; and
- any safeguarding concern or disclosure must be dealt with immediately in accordance with section 4 of this policy.

Trustees should remain mindful that any individual visit provides only a snapshot of a school and is not, in itself, a source of formal assurance about the effectiveness or performance of that school.

4. Safeguarding.

The Partnership Trust is committed to safeguarding and promoting the welfare of children and young people. Trustees and Governors must follow the school's safeguarding and visitor procedures at all times.

Any safeguarding concern or disclosure arising during a visit must be reported immediately to the school's Designated Safeguarding Lead (DSL), or a Deputy DSL, in accordance with the school's safeguarding procedures. Where a Governor does not consider it appropriate to report a safeguarding concern to the school's DSL or DDSL they must report the concern to the Trust's Director of School Improvement (Safeguarding and Inclusion). Trustees and Governors must not investigate the concern themselves.

All Trustees and Governors must have the appropriate enhanced DBS certificate in accordance with current requirements. An enhanced DBS certificate for a Trustee or Governor does not include a barred list check unless the individual is also engaging in regulated activity.

This section should be read alongside Keeping Children Safe in Education 2026 and the Trust's safeguarding policies and procedures.

5. Related guidance and documents

- [DfE Academy Trust Governance Guide](#) (updated July 2026)
- [Academy Trust Handbook 2026](#) (effective 1 October 2026)
- [Keeping Children Safe in Education 2026](#) (effective 1 September 2026)
- The Partnership Trust Governance Plan and Scheme of Delegation
- The Partnership Trust safeguarding and visitor procedures

Appendix 1: Template report for assurance visit

Governor's Monitoring Report : School Assurance Visit	
Name and role of governor(s)	
Name and role of staff member(s)	
Date and time of visit	
Agreed focus	<i>Keep closely to the agreed reason for the visit and its strategic purpose.</i>
Relevant school objective, priority or delegated responsibility	<i>Reference the School Improvement Plan, Trust priority, policy or relevant delegated function.</i>
Questions to explore	<i>To help prepare you may wish to note specific questions you want to ask based on the SIP, or points to follow up on from a previous visit and share these questions with the staff member you are visiting in advance so that they can prepare</i>
Summary of monitoring activities	<i>What have you covered during your assurance visit, what have you seen and who have you spoken to?</i>
Assurance and key observations	<i>Record the evidence shared or observed and how it contributes to the LGC's understanding and assurance regarding implementation and impact. Do not make judgements about individual staff.</i>
Further assurance requires/agreed actions	<i>Record any further information or evidence the LGC may require and any agreed follow-up.</i>
Question/Clarifications to follow up with Headteacher or Chair of Governors	

Appendix 2: Template report for a learning walk

Governor's Assurance Report : Learning Walk	
Name and role of governor(s)	
Name and role of staff member(s)	
Date and time of visit	
Agreed focus	<i>Keep closely to the agreed reason for the learning walk.</i>
Relevant school objective, priority or delegated responsibility	<i>Taken from the school improvement plan (SIP) or the school's overarching vision.</i>
Questions to explore	<i>Share planned questions in advance where appropriate</i>
General notes from discussions with staff	<i>Remain observational. Do not inspect or make judgements about individual staff.</i>
General notes from discussions with pupils	<i>Do not ask pupils to comment on a specific teacher or member of staff. Do not record pupils' names.</i>
School environment and overall atmosphere	<i>Record relevant observations linked to the agreed focus, including how the school's vision or priorities are evident in practice.</i>
Evidence contributing to assurance	<i>What relevant evidence or context was seen or heard? What does the LGC understand better as a result?</i>
Further assurance required/questions for clarification	