

Notes to Visit: (Non-Month End Visits)

Last Reviewed: 17th November 2023

| **School** |  |
| --- | --- |
| **Date of Visit** |  |
| **Attendees** |  |
| **Location** |  |
| **Duration** |  |

The Notes to Visit form (Non-Month End) is intended to be a simplified form to record the visit by a member(s) of the Central Finance Team with members of the School Finance Team, Head Teacher and on occasion Governors, outside of the Month End visits. It is NOT a replacement for the month end notes to visit form.

Bullet point notes are acceptable.

Details should be agreed with the school at the end of the meeting and the form then distributed to the Head Teacher, School Business Manager, Chair of Governors and Head of Finance.

Following the visit, copies should be kept and filed in the Centre and at the relevant school. Electronic filing is acceptable.

# Purpose

# Notes/Work Undertaken

# Review of Previous Meeting Actions (Date: xx/xx/xx)

# Actions Arising