

## **Schools Forum Meeting Agenda**

Thursday, 15 January 2026 at 9.00 am  
to be held in Teams

### **Membership**

Stewart Biddles  
Steven Hulme  
Stuart Bellworthy  
Tim Stephens  
Steve Margetts  
Alex Newton  
Tamsin Summers

Laurence Frewin  
Jake Grinsill  
Nik Salter  
Sarah Tomkinson  
Rachel Setter  
Sally Banfield  
Hannah Baker

1. **Apologies**
2. **Minutes & Actions - Chair** (Pages 3 - 10)
3. **Changes to Membership - Chair**
4. **Financial Reports - Rob Parr**
  - Potential hourly rates for Early Years 26/27
  - Comparison between 25/26 & 26/27 DSG
  - National Funding Formula - unit values 26/27
  - % increase in funding for Special Schools 26/27
  - Centrally retained functions for 26/27
  - De-delegation decisions for 26/27
  - Verbal update regarding having to amend the NFF values by less than 0.5% to make the school allocations affordable within the Schools Block.

Reports to be submitted to Board by Monday 12<sup>th</sup> January due to ILACS
5. **Financial Verbal Update - Rob Parr**
6. **Possible future changes to the Virement for 27/28 - Chair**

For information relating to this meeting or to request a copy in another format or language please contact:

**Louise Willmott,**

7. **Element 3 funding update - Hannah Baker**

8. **AOB**

Next meeting 26<sup>th</sup> February 2026

## Schools Forum Meeting Minutes

**Date:** 25 September 2025

**Time:** From 10.15

**Location:** Virtual (Teams)

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### 1. Attendance and Apologies

- **Chair:** Sarah Tomkinson
- **Vice Chair:** Stuart Biddles
- **Minute Taker:** Louise Willmott
- Attendees
- Sarah Tomkinson, Stuart Bellworthy, Alex Newton, Tim Stephens, Laurence Frewin, Sally Banfield, Stewart Biddles, Steven Hulme and Steve Margetts
- Hannah Baker, Rob Parr, Gina Powell
- Apologies from Nancy Meehan, Dan Hamer,
- Noted resignations: Jake Grinsall and Jane Jones, Debbie Horn  
**Action:** Minute formal thanks to both for their service and impact on children in Torbay.

### Membership Gaps

- Noted resignation of Debbie Horn and other vacancies: primary maintained governor, primary academy leader, secondary maintained governor, secondary academy governor, and Early Years PVI representative.
  - **Action:** Louise Willmott to email all stakeholders to seek nominations and minute the current gaps.
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### Election of Chair and Vice Chair

- Sarah Tomkinson confirmed as Chair for the academic year.
  - Stewart Biddles confirmed as Vice Chair.
  - **Decision:** Both appointments ratified for the 2025/26 academic year.
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### 2. Minutes of Previous Meeting

- No amendments were proposed.

- **Decision:** Minutes of the previous meeting were approved as a true record.
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## 5. Tribunal Statistics

- Hannah Baker presented data indicating a slight decline in concluded tribunals and mediations, attributed to improved early resolution processes.
- Noted increased requests for special school places from Devon and Plymouth authorities.
- **Action:** Hannah Baker to provide further data at the next meeting, including:
  - Mediation trends
  - Tribunal requests resolved prior to hearing
  - Direction to take statistics
- **Decision:** Forum to receive a more detailed breakdown at the next meeting.

### Discussion Points:

- Cost implications: Tribunal outcomes impact the Schools Forum budget, particularly for independent sector placements (approx. £75,000 per annum per placement).
  - Difficulty in returning pupils from independent to LA provision after tribunal order.
  - **Decision:** Forum to monitor budgetary impact and sufficiency of provision.
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## 6. Financial Reports – Early Years Budget (Rob Parr)

### Early Years Budget Detail

- The Early Years budget lines have been adjusted due to movement from deprivation funding to the ALFE (Additional Learning Funding for Early Years) line.
- The retained element of the Early Years budget is now focused solely on staffing and licensing costs, with no buffer remaining after reductions agreed at the previous Forum.
- The Synergy license cost has increased by approximately £15,000–£20,000.
- The retained element was underspent by over £100,000 in the previous year, but the current year's budget reflects increased staffing and licensing costs.

- **Action:** Rob Parr to provide a detailed breakdown of staffing costs and budget-setting principles for the next meeting, including full-time equivalent (FTE) data and rationale for budget projections.

#### **Discussion Points:**

- Medical Tuition Service (MTS) underspend noted; service has now been brought back in-house.
- Commissioned places versus pupil places: Sally Banfield requested clarification and correction of figures, particularly for Home School, to ensure accuracy in reporting.
- **Action:** Rob Parr to clarify and update commission places and pupil places figures for future meetings.

**Decision:** Forum to review budget-setting process and assumptions at the next meeting.

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#### **7&8. Safety Valve Position**

- Monitoring reports have been submitted; the Safety valve programme is not on track for a balanced position within the original safety valve agreement timeframe.
- Noted a sharp increase in statutory assessment requests (EHCPs) in July 2025.
- **Action:** Hannah Baker to update the Forum on value-for-money initiatives and the impact of the forthcoming national White Paper.
- **Decision:** Forum to monitor demographic changes and implications for future planning.

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#### **Summary of Actions**

1. Minute formal thanks to Jake Grinsall and Jane Jones.
2. Chair to write to Nancy regarding Early Years funding escalation.
3. Louise Willmott to email for new members and minute membership gaps.
4. Hannah Baker to provide further tribunal and mediation data at next meeting.
5. Rob Parr to provide staffing and budget breakdowns for Early Years at next meeting.
6. Forum to monitor safety valve position, demographic changes, and value-for-money initiatives.

7. Forum to consider implications of Schools Block transfer for future years.
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### **Summary of Decisions**

- Sarah Tomkinson and Stewart Biddles confirmed as Chair and Vice Chair for the year.
  - Minutes of previous meeting approved.
  - Not to pursue 0.5% Schools Block transfer for 2026–27.
  - Actions to improve attendance, membership, and data transparency agreed.
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### **Next Meeting:**

**Date:** 20 November 2025

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## **9.AOB Schools Block Transfer to High Needs Block**

### **Background**

During the meeting, the Principal Accountant (Rob Parr) mentioned that the Director of Finance (Malcolm Coe) had raised the possibility of 0.5% virement of the Schools Block to the High Needs Block in future financial years, as a means of addressing the ongoing and cumulative deficit in the High Needs budget. This option is being considered by the Director of Finance in response to significant financial pressures, including increased demand for SEND provision and insufficient Dedicated Schools Grant (DSG) settlements.

### **Discussion**

- The Forum was informed that, should the local authority wish to pursue a transfer of up to 0.5% from the Schools Block to the High Needs Block, this proposal must first be presented to the Schools Forum for approval.
- If the Schools Forum does not approve the virement, the local authority retains the right to submit a “disapplication request” to the Secretary of State for Education via the Department for Education (DfE). This process allows the DfE to adjudicate and potentially override the Forum’s decision, should the local authority demonstrate sufficient need and justification.
- It was clarified that, in order to ensure fairness across all schools, the local authority would also need to request disapplication of the .5 virement, the Minimum Funding Guarantee (MFG) and Minimum Per Pupil Funding Level (MPPL) so that the financial impact of the transfer is distributed equitably.

- For Torbay, a 0.5% transfer would equate to approximately £545,000 in additional funding for the High Needs Block, based on current figures. However, due to the prevalence of schools on minimum funding levels, less than half of Torbay schools would contribute under current arrangements unless disapplication is granted.

## Decisions and Actions

- **Decision:** The Schools Forum agreed that the 0.5% transfer will not be pursued for the 2026–27 financial year. However, the option may be revisited for 2027–28, depending on future budgetary pressures and the outcome of national policy changes (including the anticipated White Paper).
- **Action:** The Forum requested that, should the proposal be brought forward in future, all possible options and cost implications be thoroughly explored and presented for consideration. The Forum also requested early notification and full transparency regarding any intention to submit a disapplication request to the DfE.
- **Action:** The Forum will monitor developments and ensure that any future decision regarding the Schools Block transfer is made in accordance with statutory guidance and following consultation with all affected stakeholders.

## Reference to DfE

- The process for referring the matter to the DfE is as follows:
  1. The local authority proposes the transfer and seeks Schools Forum approval.
  2. If the Forum does not approve, the local authority may submit a formal disapplication request to the Secretary of State for Education.
  3. The DfE will review the request, consider the rationale and supporting evidence, and make a final determination.
  4. The outcome will be communicated to both the local authority and the Schools Forum, and implemented as directed.

## Next Steps

- The Schools Forum will continue to monitor the financial position of both the Schools Block and High Needs Block and will revisit the transfer proposal as necessary in future meetings.
- Any future proposal to transfer funds will be subject to full consultation, impact assessment, and compliance with DfE procedures.

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## Schools Forum

Ref	Date	Action/Decision	Assigned to	Deadline Date	RAG Status (Red/Amber/Green)	Update (incl. reasoning and decision making if applicable)
	16.1.25	Need Primary Academy Governor				Done
	16.1.25	Alex will ask for a Governor if James is a no. Louise to email James				Query is this james.down@stcm.torbay.sch.uk - email sent. James will confirm week of 17th February
	16.1.25	Debbie Horn will be the new Primary maintained Governor - email address required	Sarah Tomkinson			
	16.1.25	Early Years Figures to be brought to next meeting for last 5 years underspend	Rob Parr			
	16.1.25	Meeting to held out of Schools Forum to discuss the budget for Early Years Sarah Tomkinson to agree	Sarah Tomkinson			
	16.1.25	Laurence Frewin and Graham Pirt to meet to discuss post 16 Locality Model	Graham Pirt			
	16.1.25	Powepoint presentation to be shared from Hannah Baker	Louise Willmott			Sent to chair
	16.1.25	outcome provided in writing to schools forum members.	Emma Kerridge			Schools wish to appeal decision
	16.1.25	Children's Services will be writing to all schools to ask if they would like to come on board.	Hannah Baker			Action completed
	16.1.25	Safety Valve powerpoint to be shared	Hannah Baker			Sent to chair
	16.1.25	Invite Sarah Pirt to Schools Forum re mapping work by ward and how they have overlaid SLCN need against deprivation THIS ROLE IS NO LONGER OPERATIONAL	Hannah Baker			Siobhan Grady presented and will share slides
	16.1.25	Principal & CEO of South Devon Collage would like to see the evidence that drives the Locality Model.	Hannah Baker			Hannah to share data at the meeting.
	6.5.25	Letter to SF members re decision for the removal of the 100k HNB contribution to Early Years SEND funding will remain in place.	Nancy Meehan			
	19.6.25	send the DfE Schools Forum guidance to all members.	Louise Willmott			
	19.6.25	write to members to express the importance of full and regular attendance and contribution	Sarah Tomkinson/Stewart Biddles			
	19.6.25	Schools forum methods check guidance regarding decision making.	Forum			
	19.6.25	liaise with Head of Early Years to continue the communication regarding the SLCN pilot and support available.	Hannah Baker			
	19.6.25	tribunal numbers on paper for the next meeting.	Hannah Baker			
	19.6.25	to send the DfE Schools Forum guidance to all members.	Louise Willmott			
	25.9.25	Further data required on Tribunal Statistics to board	Hannah Baker			schools forum deferred until Jan. Statistics not within remit of schools forum
	25.9.25	Chair to write to Nancy re escalation of Early Years funding	Sarah Tomkinson			
	25.9.25	Budget breakdowns for Early Years to next meeting	Rob Parr			due for January
	25.9.25	Forum to monitor safety valve position, demographic changes, and value-for-money initiatives.	All			
	25.9.25	Forum to consider implications of Schools Block transfer for future years	All			
	25.9.25	Membership to be re addressed	Sarah Tomkinson			
