

## Schools Forum Meeting Agenda

Thursday, 19 June 2025 at 9.00 am  
to be held in Teams - Virtual

### Membership

Stewart Biddles  
Steven Hulme  
Stuart Bellworthy  
Jim Piper  
Tim Stephens  
Jayne Jones  
Steve Margetts  
Alex Newton

Tamsin Summers  
Laurence Frewin  
Jake Grinsill  
Sarah Tomkinson  
Rachel Setter  
Sally Banfield  
Hannah Baker

#### 1. **Apologies/Changes to Membership**

Please note the timings of the meetings:

School Forum Members to attend meeting at 9am

Invitees from the Local Authority to attend the meeting at 10.15am

Clive Star has resigned  
Apologies  
Stuart Bellworthy

2. **Minutes of the last meeting** (Pages 3 - 8)
3. **Schools Forum Checklist** (Pages 9 - 12)
4. **Financial Reports - Rob Parr**  
No current updates to report
5. **Safety Valve Update - Hannah Baker** (Pages 13 - 16)  
Overview of pressures and mitigation. Questions only please read

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

**Louise Willmott, [Louise.willmot@Torbay.gov.uk](mailto:Louise.willmot@Torbay.gov.uk)**

report in advance

6. **AOB**
7. **Future meeting dates**
  - 25/9/25**
  - 20/11/25**
  - 26/2/26**
  - 23/4/26**
  - 18/6/26**

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## Schools Forum Meeting Minutes

- **Date:** April 24, 2025  
**Location:** Virtual Meeting
- **Attendees:**
  - Alex Newton
  - Jayne Jones
  - Sarah Tomkinson
  - Debbie Horn
  - Stewart Biddles
  - Steve Margetts
  - Tim Stephens
  - Tamsin Summers
  - Sally Banfield
  - Rob Parr
  - Hannah Baker
  - Siobhan Grady (NHS Devon ICB)
  - Louise Willmott
- **Apologies:**
  - Stuart Bellworthy
  - Lawrence Frewin
  - Clive Star
  - Steve Hume
  - James Down
  - Daniel Hamer

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### 1. Welcome and Introductions

- **Chair:** Sarah Tomkinson welcomed all attendees and introduced Debbie Horn as the new member representing maintained schools.
- **Introductions:** Each member introduced themselves, stating their role and representation.

### 2. Minutes of the Last Meeting

- **Review:** The minutes from the previous meeting were reviewed and approved without any amendments.

### 3. Actions from Previous Meeting

- **Terms of Reference:** Discussed and agreed upon.

- **Primary Academy Governor:** Debbie Horn appointed.
- **Early Years Figures:** Rob Parr to present figures at the next meeting.
- **High Needs Block Contribution:** Consensus to recommend to continue the £100,000 contribution from the High Needs Block to Early Years for complex cases. Hannah Baker to discuss with Nancy Meehan for final decision s this is an LA decision.

#### 4. Trade Union Facilities Time

- **Discussion:** Schools agreed to release union reps as needed without a central facilities fund. Riviera Trust to cover release time for their employed rep.
- **Concerns:** Tim Stephens raised concerns about the sustainability if the current rep leaves Riviera Trust. Alex Newton and Steve Margetts echoed the sentiment of not returning to a central facilities budget.

#### 5. Early Years Funding Agreement Response

- **Presentation:** Rob Parr and Emma Kerridge provided a response to Tim Stephens' proposal.
- **Discussion:** Tim Stephens emphasized the need for the £100,000 contribution from the High Needs Block to continue. Sally Banfield supported this, highlighting the importance of not double funding from the High Needs Block.
- **Decision:** Schools Forum recommends continuing the £100,000 contribution from the High Needs Block to Early Years. Hannah Baker to take this recommendation to Nancy Meehan.

#### 6. Speech and Language Communication Needs (SLCN) Pilot

##### Locality model link - Torbay Locality Model Pilot - Family Hub

- **Presentation:** Siobhan Grady presented data on SLCN needs in Torbay, highlighting the highest needs in the 5-9 age group.
- **Pilot Overview:** Hannah Baker outlined the SLCN pilot focusing on early identification and intervention, using the balanced system approach.
- **Discussion:** Concerns were raised about the inclusion of early years settings and the terminology of "locality model." Agreement to potentially rebrand the pilot to better reflect its focus on SLCN. The discussion also covered the need to ensure that early year's settings are included in the SLCN pilot.

#### 7. Financial Reports

- **Presentation:** Rob Parr presented the financial report, highlighting overspend in EOTAS packages and the need for re-procurement of contracts. A significant overspend in Education Other Than at School (EOTAS) packages, amounting to over £1,000,000. He highlighted the need for re-procurement of some contracts to address this overspend. The overspend is a major concern and will continue until the new way of working is implemented in September.
- **See link for decision making permissions for Schools Forum**  
Stat guidance template
- **Action:** Re-procurement of contracts to be completed by September to manage the overspend.

- **Safety Valve:** Hannah Baker provided an update, noting that the high level of requests for statutory assessments and new plans is impacting the figures. The Department for Education (DfE) has asked for a three-year projection due to concerns about not achieving a balanced position by 2026-27.

## 8. Safety Valve Update

- **Statistics:** Hannah Baker shared statistics on the high level of requests for statutory assessments and new plans.
- **Discussion:** Jake Grinsill inquired about the increase in plans and tribunals. Hannah Baker noted a levelling off in tribunals and highlighted the ongoing challenge with SLCN needs.

## 9. Any Other Business

- **No additional items were raised.**

## 10. Next Meeting

- **Date:** June 19, 2025
- **Time:** 09:00 AM
- **Location:** Virtual Meeting

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## Actions:

1. **Hannah Baker:** Discuss the continuation of the £100,000 High Needs Block contribution with Nancy Meehan.
2. **Rob Parr:** Present early years figures at the next meeting.
3. **Emma Kerridge:** Ensure early years settings are included in the SLCN pilot.
4. **Hannah Baker:** Consider rebranding the Locality pilot to better reflect its focus.

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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 Govenor				Done
	16.1.25	Alex will ask for a Govenor 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 Govenor - email address required	Sarah Tompkinson			
	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 Tompkinson 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	Contributions to Early Years from the High Needs Block	Emma Kerridge			Done
	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 Miller 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.				



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## Schools forum self-assessment toolkit

This toolkit provides local authority officers and elected members with a framework for assessing the strengths and weaknesses of their schools forum. The toolkit is designed as a set of questions which can be considered by individuals or the forum as a whole.

Question	Yes / No	Notes
1. Are meeting dates set in well advance and details (including time and venue) published in an accessible manner to enable interested parties to plan their attendance?		
2. Are meetings timed to coincide with key dates? (for example, reporting of funding formula)		
3. Are meetings held in an accessible venue to enable observers to attend easily?		
4. Is there a dedicated website link for schools forum, is it current and regularly updated?		
5. Are the agenda and papers publicly available on the authority's website at least 6 working days in advance of the meeting?		
6. Are the papers published as a single document, so that users can download easily?		
7. If papers are tabled at the meeting, are they published on the website promptly after the meeting?		
8. Are draft minutes published a reasonable time (for example, within 2 to 3 weeks) after the meeting, rather than waiting until the following meeting?		

Question	Yes / No	Notes
9. Are the minutes clear and unambiguous, with sufficient detail to illustrate the discussions, without reporting verbatim every point made?		
10. Is the constitution clear and appropriate? Including for example: <ul style="list-style-type: none"> <li>- a clear process for ensuring proportional representation</li> <li>- the process for electing members and their tenure</li> <li>- the timescale for review is clearly set out</li> <li>- the process for dealing with repetitive non attenders</li> </ul>		
11. Is there an induction pack or training programme available for new members?		
12. Is the election process clear and transparent? Representatives are elected only by the group they are representing, whether phase-specific for maintained schools, or by the proprietors of academies for academy members.		
13. Do the papers contain clear recommendations and indicate in a consistent manner whether the item is for information, consultation or decision?		
14. Is it clear to observers who attendees at the forum are representing? (for example, by use of name plates, indicating sector)		
15. Does the chair manage the meeting well, ensuring that all are able to contribute to the agenda items, that no bias towards any sector is evident and that no single person or organisation is able to dominate the discussion?		
16. Is there inclusive participation in discussions for all phases and types of members?		

Question	Yes / No	Notes
17. Do members actively canvass views and objectively represent their whole peer group at the forum and provide feedback after meetings?		
18. Where votes are required, is it clear who is eligible to vote for different items?		
19. Where votes are required, are the arrangements for recording the votes clear and unambiguous?		
20. Is there a system in place for a decision if votes are tied?		
21. Is the operational & good practice guide used to regularly review the forum's adherence to good practice?		

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## Torbay Schools Forum Update – June 2025

**Report Title: Update on Torbay Safety Valve Position**

**Agenda item:**

<b>Prepared By:</b>	<b>Strategic Lead Education and SEND – Hannah Baker</b>	<b>Contributors:</b>	<b>Principal Accountant - Rob Parr</b>
<b>Partner Organisation:</b>	<b>N/A</b>		
<b>Date Prepared:</b>	<b>10<sup>th</sup> June 2025</b>	<b>Date of Meeting:</b>	<b>19<sup>th</sup> June 2025</b>

### 1. Purpose

This paper has been prepared to update Schools Forum members on the current position with Torbays Safety Valve Agreement.

This paper is designed to give members an overview of the progress and risk levels of this agreement, which will also include an update on the financial implications of the SEND Sufficiency transformation work which has begun this academic year (and will now continue annually as a business as usual event).

### Status of the Current Safety Valve Programme and what this means for Torbay:

In March 2025, Torbay submitted its sixth monitoring report to the DfE Safety Valve Department. For the first time, Torbay needed to report that it would not meet its Safety Valve target by the end of the 2026/27 financial year and would still be in deficit. The DfE has requested further information on when a balanced position will be reached.

The financial position of Torbay's Safety Valve Programme indicates that the cumulative deficit before Safety Valve payments at the end of 2024/25 was £14.469 million, with Safety Valve payments received from the DfE amounting to £8.260 million, resulting in a net deficit of £6.209 million.

The remaining Safety Valve payments due from the DfE in 2025/26 and 2026/27 are £4.650 million, leading to a projected deficit of £1.559 million at the end of the Safety Valve period, excluding forecast overspends.

Our future projections show a gradual reduction in the cumulative deficit, with figures of £2.802 million at the end of 2026/27, £2.702 million at the end of 2027/28, £2.052 million at the end of 2028/29, £1.202 million at the end of 2029/30, and £0.602 million at the end of 2030/31, therefore now not reaching a breakeven point by the end of 2031/32.

We understand that the national Safety Valve Programme will not be extended beyond its

original end date of March 2027 and no new authorities will be joining this programme. This poses a significant risk to Torbay if we fail to meet our targets and our payments are halted.

However, we have received confirmation that the most recent payment from the March monitoring report will be made.

### **Key Risks for Torbay**

Schools Forum should be aware of the ongoing and heightened risks associated with pressures on the Higher Needs Block. National challenges, such as National Insurance contributions and teachers' pay rises, are making educational budgets increasingly difficult to manage. Additionally, a sharp decline in birth rates locally means our primary school settings in particular are seeing reduced funding, which in turn means many of their 'universal' services they would offer to support SEND need (at SEN Support) are being strained and diminished forcing parents to seek statutory support (through a request for a Statutory Assessment) leading to more requests for EHCPs. The continued high level of Requests for Statutory Assessment offers a key explanation as to why it is proving to be extremely challenging to meet our financial targets within the desired timeframe.

Although a new national plan for SEND is expected imminently (and certainly by January 2026) this is unlikely to be in time to make any differences to our current position.

### **Mitigations**

Over the past two years Torbay has been working on a plan to mitigate the number of RSAs being requested by launching a new Graduated Response toolkit. Despite this, and due to the continued demand surrounding the national and local context, this has failed to reduce the level of statutory assessment requests. Much of this demand is also fuelled by the continued extraordinary demand for health assessments (especially in Autism and Speech and Language) where long waits are again encouraging parents and schools to seek statutory support through a plan.

Torbay have been strategically targeting the aspects of the spend on the Higher Needs Block which are causing the most strain. These areas include the independent sector places, the high costs of individual packages when a child or young person cannot attend school or is excluded and post16 places.

The LA SEND and commissioning team have been working on a transformative programme for SEND sufficiency. Better sufficiency will mean we have enough Local Authority places to meet need meaning we don't need to seek placements in the independent sector or via an individualised programme.

Some of the measures we have taken this academic year are:

- A Torbay EOTAS (Education Other than at School) offer which will provide a high quality and consistent offer for young people will also reduce per head costs via a block purchased offer.
- A special project to bring back 8 young people from independent provision to Local Authority provision by providing local special school places which meet the current need.

- Changes to the deployment of specialist Enhanced Resource Provision places, ensuring we have the right specialist places where we need them. All ERP settings have been revised with some changes to entry/exit criteria, age range and offer.
- A post16 pathway review which is more focused on employment pathways. This work has already begin this year with our providers but will continue into the new academic year.
- Changes to the commissioned numbers of special school places. Additional SLD and SEMH places were desperately in need this year to avoid a large spike in tribunal applications and independent sector requests. Torbay commissioned numbers (of ERPs and special schools) had not been reviewed for more than ten years; this will now be an annual review and analysis of need led by our revised Joint Strategic Needs Analysis.

## **Conclusion**

It is essential that we continue to work on our special school sufficiency providing the right places as indicated by our JSNA. Next year we will need to make further changes to our specialist places in order to meet need within our Local Authority resource.

The largest sustained risk to the Safety Valve agreement is the continued high level of Requests for Statutory Assessment. The Element 3 costs have increased this academic year due to the number of EHCPs being issued, with our rates of cessation not able to impact a balanced net position.

The place-based work being piloted this year has no financial impact but we hope that a stronger partnership approach will be able to raise parental confidence that need can be met without the need for statutory services.

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