

Schools Forum Meeting Agenda

Thursday, 25 September 2025 at 9.00 am
to be held in Mezzanine Room 3, Tor Hill House, Union Street, Torquay, TQ2 5QW

Membership

Stewart Biddles
Steven Hulme
Stuart Bellworthy
Clive Star
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

Jake Grinsill is stepping down
Early years rep required.

- 2. Minutes of the last meeting** (Pages 3 - 8)
- 3. Re check guidance on decision making**
- 4. 10.15 am Torbay council to Join the meeting**
- 5. Tribunal Statistics – Hannah Baker** (Pages 9 - 10)
- 6. Financial Reports- Rob Parr** (Pages 11 - 16)
- 7. Safety Valve Update- Hannah Baker**
- 8. Schools Forum Update 16th Sep 25 - Copy (1)** (Pages 17 - 20)

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

Louise Willmott,

9. AOB plus future dates

20/11/25

26/2/26

23/4/26

18/6/26

Schools Forum

19th June 2025

Minutes of the Meeting:

Attendees:

- Stewart Biddles
- Hannah Baker
- Jayne Jones
- Alex Newton
- Jake Grinsill
- Sally Banfield
- Debbie Horn
- Steve Margetts
- Louise Willmott
- Tim Stephens
- Stephen Hulme
- * Tamsin Summers

1. Apologies and Changes to Membership

- Clive Starr(resigned)
- Stuart Bellworthy
- Sarah Tomkinson
- Rob Parr
- Laurence Frewin

Stewart Biddles Chaired the Schools Forum meeting in the absence of Sarah Tomkinson.

2. Minutes of the Last Meeting

Minutes and Actions agreed and ratified.

Point 8 re number of Tribunals decreasing – Hannah to bring information to the next meeting. Sally questioned the accuracy of the reported leveling off in tribunals. Hannah clarified that while overall tribunals have decreased, specific settings like Coombe Pafford and Mayfield school are still seeing higher numbers from both Torbay and Devon LA.

Louise to send Schools Forum guidance with the minutes to members.

Members do not agree with the decision on Early Years funding and would like to escalate this to understand what methods of appeal exist. Members to discuss the powers held by Forum at the next meeting.

Jayne raised concerns about the timeliness of communication regarding the SLCN pilot. Hannah explained the support available and the need for better communication.

Rebranding the Locality Pilot – Hannah addressed that it was something that will be considered as part of the locality pilot evaluations.

3. Schools Forum Checklist

Louise to send the checklist out to all members to return in word format. Sent

4. Financial Reports

Rob Parr's figures will be rolled over to the next meeting.

5. Safety Valve Update:

- Jake enquired about the strategic approach from the SEND department in supporting PVI (Private, Voluntary, and Independent) settings with RSA (Request for Statutory Assessment) and EHC (Education, Health, and Care) plan applications. He expressed concerns about the lack of familiarity with the process in some nurseries, leading to challenges in supporting children with complex needs transitioning to primary school. ¹
- Hannah explained that there is an early years panel and a Section 23 notice panel that regularly discuss children with significant needs. The SEND team is part of this panel, and they work closely with Early Years to ensure that children who may need an EHC plan are identified early. She acknowledged that there have been a few instances where the process was not followed correctly, often due to cross-border issues or misunderstandings about the timeline. Hannah offered to look into specific cases if provided with details and emphasized the importance of communication and training for nursery staff.

Actions:

Locality Pilot Communication to Early Years Providers:

- **Hannah** to liaise with Head of Early Years to continue the communication regarding the SLCN pilot and support available.

Safety Valve Update:

- **Hannah** to provide tribunal numbers on paper for the next meeting.

Forum Powers and Membership:

Louise to send the DfE Schools Forum guidance to all members.

Stewart / Sarah to write to members to express the importance of full and regular attendance and contribution.

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Schools Forum

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Tribunal Information to date 27.08.2025

Brief of figures requested for Schools Forum:

- Number of Tribunals is projected to rise nationally.
- Torbay Tribunals have slightly declined:

Year/ cases	Concluded tribunals
2025	29
2024	33
2023	21 +1 (moved LA)
2022	12 + 1 (moved LA)
2021	8
2020	10

- Mediations have declined:

Year/ cases	Mediation requests received
2025	9
2024	19
2023	34
2022	19
2021	2
2020	6

- The biggest rises in Torbay have been the section I appeal. The section I appeals have been mainly for Non-Section41 Independent schools followed by our two local special schools Mayfield and Combe Pafford.
- We are working closely with parent / carers / young people to resolve the tribunal appeals before they get to a hearing.

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Agenda Item 6

Forecast Year End Position 2025/26 – Schools Forum 25/9/25

Dedicated Schools Grant (DSG) funded activities are currently forecast to **overspend by £1.588m**.

The following table details the main areas of both over and under spend. Many of these budgets are demand led and will be monitored during 25/26 and revisions reported accordingly.

Budget Heading	Budget	Actuals to date	Forecast Year End	Over / (Under) Spend
Early Years – under 2's and 2, 3 & 4 yr old payments – PVI's, Schools & Academies	£13.627m	£5.506m	£13.627m	£0k
EY - Offset as we aren't reporting any unspent balances on ALFI, Deprivation, PP & DAF				£16k
Early Years – ALFI	£485k	£198k	£550k	£65k
Early Years – Deprivation (IDACI)	£270k	£260k	£260k	(£10k)
Early Years – Pupil Premium	£172k	£55k	£165k	(£7k)
Early Years – Disability Access Fund	£114k	£13k	£50k	(£64k)
Early Years – Retained element	£437k	£196k	£437k	£0k
Joint Funded Placements	£200k	£88k	£143k	(£57k)
Recovery of funding from schools for Excluded Pupils, MTS and Elective Home Education	(£150k)	(£68k)	(£130k)	£20k
Contribution from Health towards EHCP's	(£150k)	£0k	£0k	£150k
South Devon College Placements	£1.200m	£478k	£1.275m	£75k
Independent Special School Placements	£2.392m	£834k	£3,040m	£648k
EOTAS packages for EHCP pupils	£1.857m	£1.312m	£2.600m	£743k
SEND personal budgets	£20k	£36k	£100k	£80k
Payments to / recoupment from other authorities for mainstream and Special School places	(£405k)	(£91k)	(£315k)	£90k
Medical Tuition Service	£970k	£442k	£620k	(£350k)
Virtual School / Hospital Tuition / Vulnerable Students Team	£755k	£284k	£683k	(£72k)
School contingencies (Planned pupil growth)	£95k	£101k	£105k	£10k
EHCP in-year adjustments (see separate paper for details)	£650k	£483k	£800k	£150k
Special Schools / High Needs in-year adjustments (see separate paper for details)	£700k	£790k	£875k	£175k
School Intervention / Commissioning	£3k	£10k	£3k	£0k
Business Support / Business Intelligence	£271k	£101k	£271k	£0k
Senior Management, Central Recharges, Admissions, EAL / Travellers, SACRE	£593k	£115k	£519k	(£74k)
Visually impaired / Hearing impaired / Advisory Teachers	£193k	£79k	£193k	£0k
Total – Forecast Year End Position 25/26				£1.588m

Cumulative overspend before Safety Valve payments C/Fwd from 24/25 £14.469m

Cumulative forecast overspend before SV payments at end of 25/26 £16.057m

Safety Valve payments received up to end of 24/25 from DfE (£8.260m)

Forecast 25/26 in-year Safety Valve payments from DfE (£1.550m)

Total Forecast Safety Valve payments by end of 25/26 (£9.810m)

Forecast net overspend at end of 25/26 after Safety Valve payments £6.247m

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Special School and other High Needs funding adjustments for 25/26

	Combe Pafford	Combe Pafford	Mayfield School	Mayfield Chestnut	Mayfield Total	Brunel SEMH	Brunel SEMH	Lodestar AP	Lodestar AP	Totals	Totals £
Number of places - January 25	265		231	32	263	55		55		638.00	
Number of pupils - January 25	257		227	31	258	48		47		610.00	
Number of places - September 25	240		256	40	296	63		55		654.00	
		£			£		£		£		
Initial Place led funding		2,504,167			2,822,500		596,667		550,000		6,473,334
Initial Pupil led funding		1,779,377			3,147,243		902,160		645,404		6,474,184
Initial pupil specific additional funding		106,462			58,731		0		0		165,193
To mirror 3.4% increase in mainstream schools additional grant		140,484			206,889		56,862		43,450		447,685
Previously Teachers Pay & Pension Grants		169,282			190,801		40,335		37,180		437,598
Other funding - Outreach / 6th day provision / rent					332,698		0		0		332,698
Pupil Premium		161,440			182,150		39,900		30,450		413,940
Total initial funding		4,861,212			6,941,012		1,635,924		1,306,484		14,744,632
In-Year adjustments	Pupils	Funding £	Mayfield Pupils	Chestnut Pupils	Funding £	SEMH Pupils	Funding £	AP Pupils	Funding £	Pupils	Funding £
April	252	(10,772)	231	33	75,631	55	131,565	50	41,196	621	237,620
May	251	(3,093)	231	32	(14,768)	56	20,562	50	0	620	2,701
June	251	0	231	30	(26,850)	57	18,163	50	0	619	(8,687)
July	251	0	231	31	12,083	56	(14,096)	49	(10,299)	618	(12,312)
August	251	0	231	31	0	56	0	49	0	618	0
September	239	41,481	256	41	296,599	62	80,261	42	(56,072)	640	362,269
October										0	0
November										0	0
December										0	0
January										0	0
February										0	0
March										0	0
Total In - year pupil / place led adjustments		27,616			342,695		236,455		(25,175)		581,591
Enhanced Provision (in-year changes in pupil top-ups)											(3,093)
Enhanced Provision (in-year increases in place numbers)											0
Excluded Pupils / 6th Day Provision - Mayfield (Sept - Mar)											73,380
In-year pupil specific additional funding		(14,066)			125,433		26,875				138,242
Total - In-Year adjustments		13,550			468,128		263,330		(25,175)		790,120
Special School / High Needs contingency budget											700,000
Current balance (under) / over											90,120

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Education, Health & Care Plan Funding for 24/25 & 25/26

	24/25	25/26	Increase / (Decrease)
Number of FTE's with EHCP	520	562	42.00
	£	£	£
Funding above £6k (element 3) allocated as a top-up per eligible pupil	3,511,178	4,051,151	539,973
Funding for new EHCP's and other in-year adjustments	500,000	650,000	150,000
In-Year adjustments			
April	48,648	14,298	(34,350)
May	(12,827)	259,186	272,013
June	88,050	73,664	(14,386)
July	(5,872)	54,308	60,180
August	83,140	81,865	(1,275)
September	156,870		
October	125,063		
November	117,855		
December	(6,430)		
January	74,934		
February	(82,701)		
March	8,498		
Total - In-Year adjustments	595,228	483,321	
(underspend) / overspend	95,228		

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Torbay Schools Forum Update – September 2025

Report Title: Update on Torbay Safety Valve Position

Agenda item:

Prepared By:	Divisional Director Education – Hannah Baker	Contributors:	Principal Accountant - Rob Parr
Partner Organisation:	N/A		
Date Prepared:	16th September 2025	Date of Meeting:	25th September 2025

1. Purpose

This paper has been prepared to update Schools Forum members on the current position with Torbay's 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 July 2025, Torbay submitted its seventh monitoring report to the DfE Safety Valve Department. In March of this year 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 then 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 2025/26 will be £16.057 million, with Safety Valve payments received from the DfE amounting to £9.810 million, resulting in a net deficit of £6.247 million at the end of 25/26.

The remaining Safety Valve payments due from the DfE in 2026/27 are £3.100 million, leading to a projected deficit of £3.147 million at the end of the Safety Valve period, excluding forecast overspends in 26/27.

Our future projections show a gradual reduction in the cumulative deficit, with figures of £3.547 million at the end of 2026/27, £3.397 million at the end of 2027/28, £2.597 million at the end of 2028/29, £1.597 million at the end of 2029/30, and £0.797 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 will be made.

The proposed White Paper, due this Autumn, will give a direction of travel for all Local Authorities but will particularly enable Torbay (and other Authorities in the Safety Valve Programme) to consider the direction of travel for future sustainability of its resources for SEND.

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. As an example the requests for statutory assessment in July were almost double than that of any month in the 2024/5 academic year.

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. The new Priority Impact Plan targets support for schools to enhance and develop their ordinarily available provision (further details to follow once this plan has been approved by the DfE).

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. This aspect has been under continued strain with many out of area independent providers requesting pay uplifts or additionality to continue to meet a young person's needs.

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 new measures which have begun this September are:

- A Torbay EOTAS (Education Other than at School) offer.
- A special project to bring back 8 young people from independent provision to Local Authority provision by creating a satellite hub within our SEMH provision.
- An extra 16 SEMH places (8 primary and 8 secondary).
- 25 Extra SLD places which now makes Torbay more sufficient in this need area and avoids independent sector placement usage in this area.
- A post16 pathway review continues which is more focused on employment pathways. This work has already begun last academic year with our providers but will continue into the new academic year where all our specialist provision at post16 will be reviewed for value and outcomes. An example of this which has been started already is the Supported Internship pathway for 8 SEMH young people from Brunel school.

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. This will enable us to avoid seeking independent sector placements locally.

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 work to enhance and enable schools to better meet need within their ordinarily available provision should support this but will by no means completely mitigate this risk.

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