

## Schools Forum Meeting Agenda

Thursday, 23 April 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. **Forum members meet for preparatory discussions:**
  1. Membership update
  2. Annual workplan and approach
  3. Agenda preparation
2. **Attendance**
3. **Welcoming new members and confirm membership - Consultation**
4. **Minutes and actions** (Pages 3 - 10)
5. **Adopting an annual workplan for Schools Forum - consultation**  
Please see attached on email
6. **White paper discussion - Hannah Baker - Consultation**  
The paper will be shared when available.
7. **Pupil place planning update - Hannah Baker - Information** (Pages 11 - 16)
8. **Items for next meeting**

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

**Louise Willmott,**

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## **Schools Forum – Minutes of Meeting**

**Date:** 26 February 2026

**Time:** 08:55–10:40

**Location:** Microsoft Teams

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### **Attendance**

- Alex Newton (Chair)
  - Hannah Baker (LA)
  - Rob Parr (Finance, LA)
  - Tim Stephens
  - Matt Burrell
  - Steven Hulme
  - Stuart Bellworthy
  - Nikki O’Dwyer
  - Stuart Heron
  - Sally Banfield
  - Louise Willmott
  - Katy Burns
  - Gina Powell
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### **Apologies**

- Steve Margetts
  - Dan Hamer
  - Tamsin Summers
  - Nik Salter
  - Sarah Tomkinson
  - Laurence Frewin
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**LA joined the meeting at 09.30, the first 30 minutes of the meeting are not minuted as per Alex Newton (chair)**

### **4. Membership (Document to be shared)**

#### **Summary**

- Updated membership list attached. Confirmed that all Headteachers have been sent the updated membership and no objections were raised. New members therefore appointed to Forum and thanked for their participation.
- September meeting will include the formal annual membership review (Chair, Vice Chair, membership confirmation).

- Clarification required regarding the **Clerk** to Schools Forum:
    - Historically held by Mike Freeman.
    - Currently undertaken informally by Louise due to PA role.
    - Given the reported **£38k costing**, Forum expressed strong need for clarity and formal designation.
  - Terms of Reference: Deputisation confirmed as permitted, provided the Clerk is informed in advance.
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## 5. Minutes & Action Tracker of the Last Meeting

### Minutes

- Minutes were reviewed and agreed as accurate.

### Action Tracker Review

- **Virement/ Block Transfer:** Should be an **October only** annual agenda item.
  - **Early Years 12/13/14 weeks → 14/30/14/13/11 model:**
    - Transition in progress; being discussed in Early Years Forum.
  - **Access to High Needs Block:**
    - Previously to be escalated by Sarah; unclear if action completed.
  - **Element 3 Funding / SEND Reforms:**
    - Pending national guidance; to remain open.
  - **Pupil Place Planning:**
    - Forum requested:
      - A baseline set of forecasts
      - Locality-level breakdown
      - Annual update in **Summer Term** following national allocation days
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## 6. ISEP and Tribunals – Hannah Baker

*(Part 2 held as confidential; not included in published minutes)*

### Overview (non-confidential)

- Tribunal appeals increased significantly from **38 (2024)** to **89 (2025)**.

- Only **3** progressed to hearing due to improved sufficiency (e.g., additional Mayfield places).
  - Sharp rise in parent requests for **Independent Special Schools (ISEPs)**,
  - Legal context:
    - LA must rely on **best use of resources** defence—rarely upheld.
    - Parents increasingly represented by legal counsel.
  - ISEP costs (approx.):
    - Phoenix Bay: **~£55k**
    - Preston Bridge: **£61k**
    - On Track: **~£68k**
  - Contract monitoring shows concerns around attendance and outcomes at certain providers.
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## 7. Closure of the Safety Valve – Hannah Baker

### Summary

- National direction: **Safety Valve programme ends 31 March 2026** (one year early).
  - Expected: **90% of Torbay’s accumulated deficit to be written off.**
  - Estimated Torbay liability after reset: **£734k.**
  - LA has allocated **£1.7m** in reserves to cover its 10% obligation over next three years.
  - Will be replaced with **High Needs Stability Grant** (Autumn 2026).
  - New **SEND Reform Plan**, including a financial plan, will be required.
  - LA awaiting clarity on:
    - Whether Safety Valve restrictions on places are lifted.
    - Timescales for new statutory requirements.
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## 8. Update re Finance – Rob Parr (verbal)

### Key Points

- School **allocations released today**; members instructed to check email inboxes.
- National funding formula **scale-back remains unchanged (0.38%)**.
- DSG 2026–27:

- Will be set **realistically** with deficit recorded explicitly (post SafetyValve).
  - Additional spend (3-month period) likely to worsen deficit slightly but within manageable parameters.
  - **Virement / Block Transfer (national context):**
    - 96 of 151 local authorities enacted a block transfer this year:
      - 26 authorities: 0–0.49%
      - 52 authorities: full 0.5%
      - 18 authorities: above 0.5%
    - Torbay to consider any virement decision at the **October** meeting annually.
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## 9. Annual Meeting Plan

### Summary

- Forum to adopt a structured annual work plan.
  - Proposed timeline:
    - **September** – Membership review
    - **October** – Environment/Virement decision; early financial decisions
    - **December / January** – Cluster of statutory financial decisions
    - **Spring Term** – Pupil place planning overview
  - April meeting date (23 April) retained for 2026 due to conflicts (year-end, appeals, SATs).
  - Paper circulation schedule: **two weeks prior** wherever possible.
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## 10. Items for Next Meeting

- Safety Valve / SEND Reform update
  - Pupil number projections (baseline + locality detail)
  - Draft annual work plan for approval
  - Induction and training framework
  - Tribunal / ISEP monitoring (if materially changed)
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## 11. Any Other Business (AOB)

None raised.

Meeting ended with thanks from the Chair.

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## **Actions**

### **Membership & Governance**

- **Louise** – Update membership list (remove outdated names).
- **Louise** – Add September membership review to future agendas.
- **Hannah** – Confirm formal Schools Forum Clerk role.

### **Work Plan**

- **Alex** – Draft annual work plan and circulate.
- **Work Plan** – Schedule environment/virement decision for **October** only.
- **Work Plan** – Add two-week paper release deadline.

### **Agenda & Communications**

- **Louise** – Revise agenda format to include Info / Consult / Decision.
- **LA Comms + Louise** – Establish method to circulate minutes to *all* settings.
- **Rob** – Input on meeting date planning aligned to financial cycles.

### **Induction**

- **Hannah** – Contact Devon Education Services re induction training.
- **Work Plan** – Add induction framework + deputisation reminder.

### **Action Tracker Follow up**

- **Alex** – Follow up with Sarah on Access to High Needs Block escalation.
- **Admissions / Claire Talbot** – Provide annual pupil place planning update.
- **Hannah** – Bring SEND/Element 3 information once issued nationally.

### **Tribunals / ISEPs**

- **Forum** – Continue monitoring; add to agenda if trends escalate.

### **Safety Valve**

- **Agenda** – Add Safety Valve/SEND Reform update to next meeting.
- **Hannah & Rob** – Provide updates once DfE releases detail.

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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 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			Done. Meeting held 22/1/2025.
	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 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.	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			Agreed with Chair to share with Chair & Tim, supplied information in emails dated 30/9/25 & 2/10/25. Also followed up with additional email 15/1/26 and left up to chair if it needed to be forwarded to all members
	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			Workplan for October
	25.9.25	Membership to be re addressed	Sarah Tompkinson			



	15.1.26	Review forum membership, contact potential new members, and clarify representation.	Alex Newton			
	15.1.26	Share the current membership/terms of reference document with Alex.	Sarah Tomkinson			
	15.1.26	Add governance support and membership review to the next agenda.	Louise Willmott			Devon Services
	15.1.26	Clarify and communicate the transition plan for the 12/13/14 week funding model.	Emma Kerridge			Discussing outside of this Forum in Early Years Forum
	15.1.26	Provide alternative scenarios for retained funding and more detail on central staffing roles in future papers.	Rob Parr			Yes will do this
	15.1.26	Circulate the early years staffing breakdown to all forum members.	Rob Parr			Agreed with Chair to share with Chair & Tim, supplied information in emails dated 30/9/25 & 2/10/25. Also followed up with additional email 15/1/26 and left up to chair if it needed to be forwarded to all members
	15.1.26	Sarah Tomkinson to escalate the issue of early years access to the high needs block.	Sarah Tomkinson			Alex to check with Sarah Tomkinson
	15.1.26	Hannah Baker to provide tribunal and mediation data related to high needs block funding at a future meeting.	Hannah Baker			scheduled for next meeting - data review underway
	15.1.26	Hannah Baker to bring a paper on Element 3 funding and SEND reforms after the white paper is published.	Hannah Baker	post April 2026		Requested timeline yesterday but not available yet
	15.1.26	Rob Parr to bring DfE guidance on planned pupil growth, admissions, and forum servicing to the next meeting.	Rob Parr			I met with Alex Newton 30/1/26 to discuss, Alex will be sending out an email to all members to summarise our discussion.
	15.1.26	Claire Talbot to provide an update on pupil place planning and sustainability.	Claire Talbot			
	15.1.26	Louise Willmott to keep the schools block to high needs block transfer ("Virement") as a standing agenda item.	Louise Willmott			Moved to annual October meeting
	15.1.26	Bring a paper on which LAs have made block transfers and to what levels.	Rob Parr			Will bring this to Feb 26 meeting
	15.1.26	there is any data available as to which LAs have not been able to meet the full NFF rates and by how much. And I think he gave us a date when he'd be able to confirm the exact figure by which the NFF values will be reduced (currently projected as approx. 0.38%).	Rob Parr	28 <sup>th</sup> February.		Data regarding how LA's allocate funding to schools was included in the minutes from the January 26 meeting. Schools will be informed of the exact unit values and % adjustment by 28/2/26, hopefully a couple of days before.
	26.2.26	Update membership list on agenda template (remove outdated names).	Louise Willmott			Informed Governance
	26.2.26	Add September membership review to annual cycle.	Louise Willmott			
	26.2.26	Confirm formal Clerking arrangements and report back.	Hannah Baker			Request has gone to governance team who are looking into this. Capacity is stretched so up to schools forum if they want to continue to pursue this or whether they want to seek an external clerk?
	26.2.26	Draft annual work plan and circulate to Rob and members.	Alex Newton			
	26.2.26	Move environmental/virement decision to October meeting.	Louise Willmott			
	26.2.26	Add two-week paper deadline framework.	Louise Willmott			
	26.2.26	Revise agenda format to mark decision/consultation/information items.	Louise Willmott			
	26.2.26	Determine method to distribute minutes to all settings.	Hannah Baker			DfE are facilitating a structures workshop at present. It could be added to the newsletter regularly as a link to the minutes?
	26.2.26	Provide input on date planning aligned with financial cycles.	Rob Parr			Actioned
	26.2.26	Contact Devon Education Services re: induction training offer.	Hannah Baker			Yes - Devon can accommodate this. They run a set of either general induction training for governors etc... or might be able to accommodate something more bespoke.
	26.2.26	Include induction framework and deputisation reminder.	Alex Newton			
	26.2.26	Follow up with Sarah on escalation of Early Years access to High Needs Block.	Alex Newton			
	26.2.26	Provide pupil place planning baseline and annual updates.	Claire Talbot			
	26.2.26	Add Safety Valve/SEND Reform update to next meeting.	Rob Parr			Ok
	26.2.26	Provide updates promptly once DfE issues guidance.	Hannah Baker			ongoing - awaiting send reform guidance currently

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## SCHOOL PLACE PLANNING

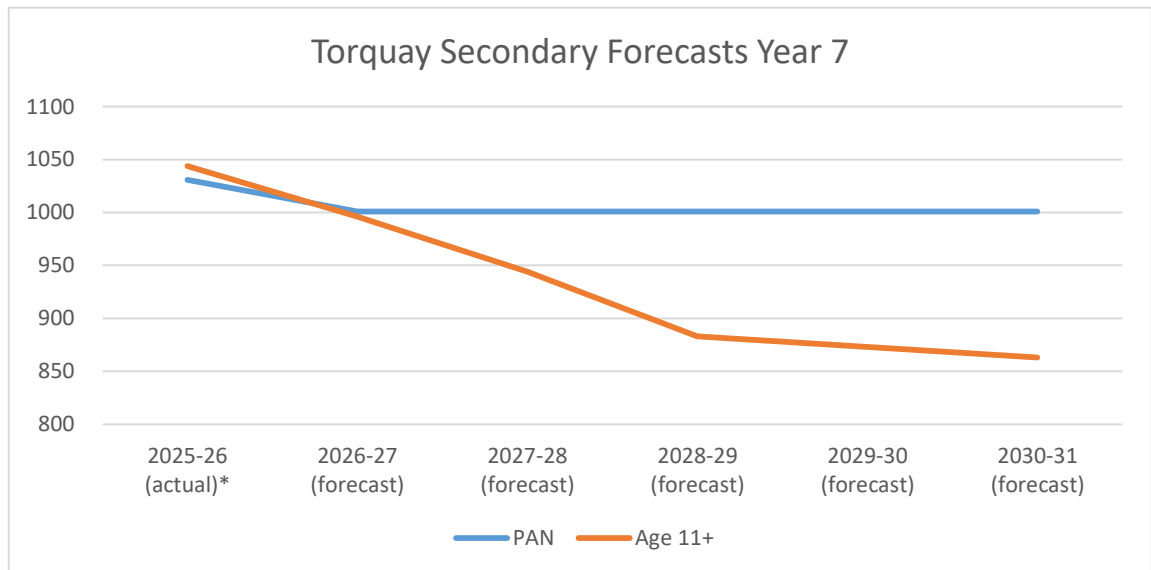
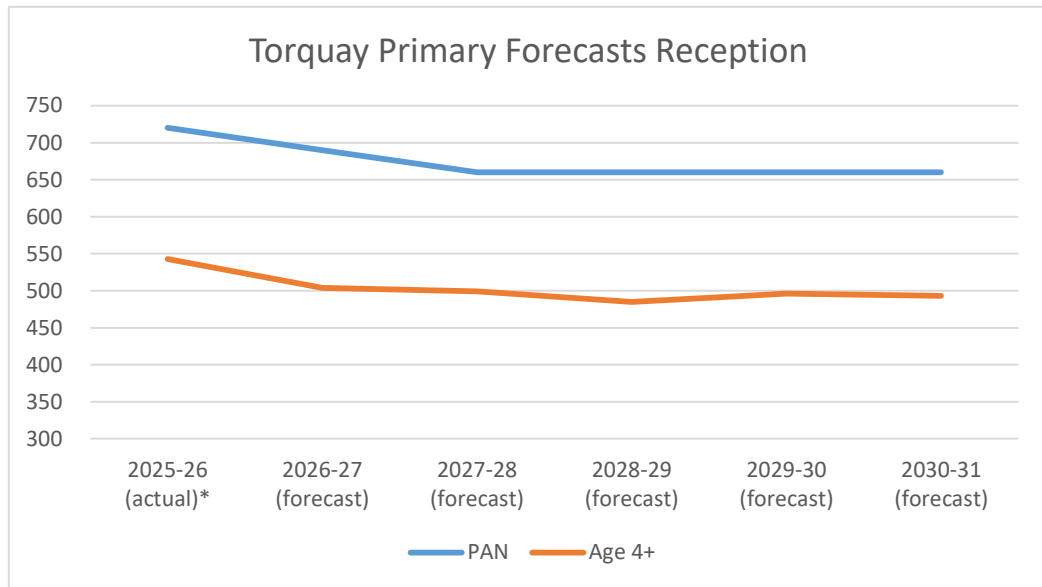
### INTRODUCTION

1. Torbay Local Authority (LA) has a statutory duty to ensure all children of school age can access education. Pupil projections enable the LA to plan and ensure it has the capacity to meet demand. By providing an indicator for the expected school population over the coming 5 years, projections enable the LA to effectively plan provision to meet demand. Projections are estimates based on historical trends; the assumption is that patterns and trends affecting current pupil numbers in the area will continue as they are. The projections are updated bi-annually to ensure they reflect the most up to date data and local intelligence.
2. This Executive Summary provides an overview of the current and projected pupil numbers for Torbay across the primary and secondary sectors. It is broken down into three Planning Areas: Torquay, Paignton and Brixham, providing an overview of the current projections, implications for school places and the LA's actions for managing future provision.
3. There are four key observations affecting Torbay's current projections:
  - Persistent low number of births across all three planning areas; consistent with national trend,
  - The reduction in population growth with a slowdown in housing and movement into the area,
  - Local secondary transfer rates remain at an all-time high as more pupils remain in area, and the increased migration at secondary level into the bays three selective schools as the local cohort size decreases and more places are offered to out of area pupils.
4. As a result, the current challenges facing the LA are managing the surplus primary capacity and planning for the future fall in demand for secondary school places as the primary surplus moves into the secondary sector.

For Further Information on School Place Planning please contact:

Clare Talbot	Head of School Place Planning & Capital, Education Team, Torbay Council
	01803 208220 <a href="mailto:clare.talbot@torbay.gov.uk">clare.talbot@torbay.gov.uk</a>
Samantha Poston	Team Leader, Education Team, Torbay Council
	01803 208260 <a href="mailto:samantha.poston@torbay.gov.uk">samantha.poston@torbay.gov.uk</a>

# PLANNING AREA: TORQUAY



**Proposed housing developments in Torquay with an anticipated pupil yield above historical level:**

Edginswell	approx. 300 homes - mixture of starter and family homes; not yet started
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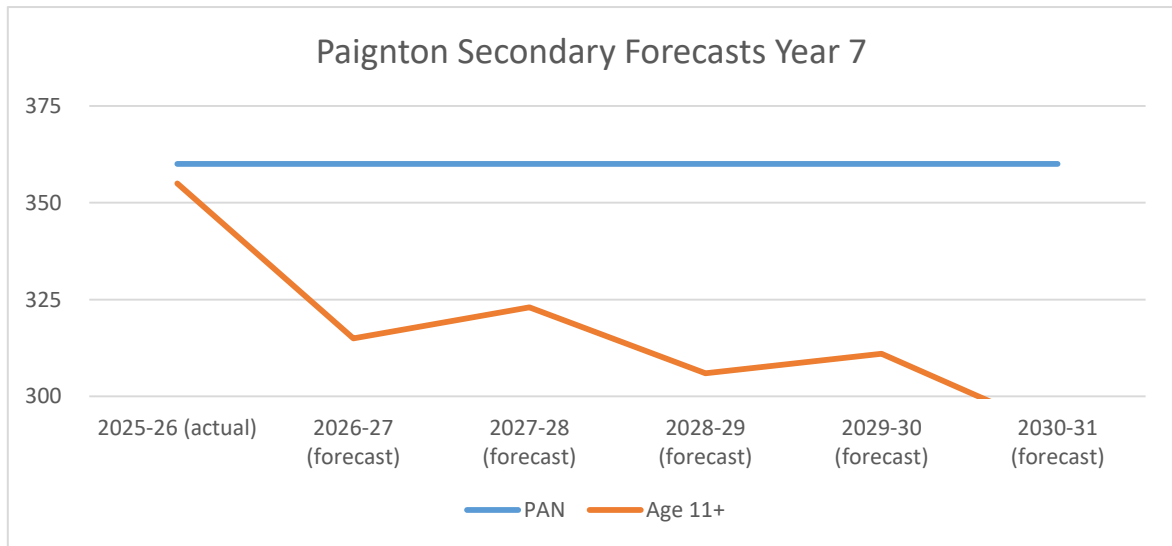
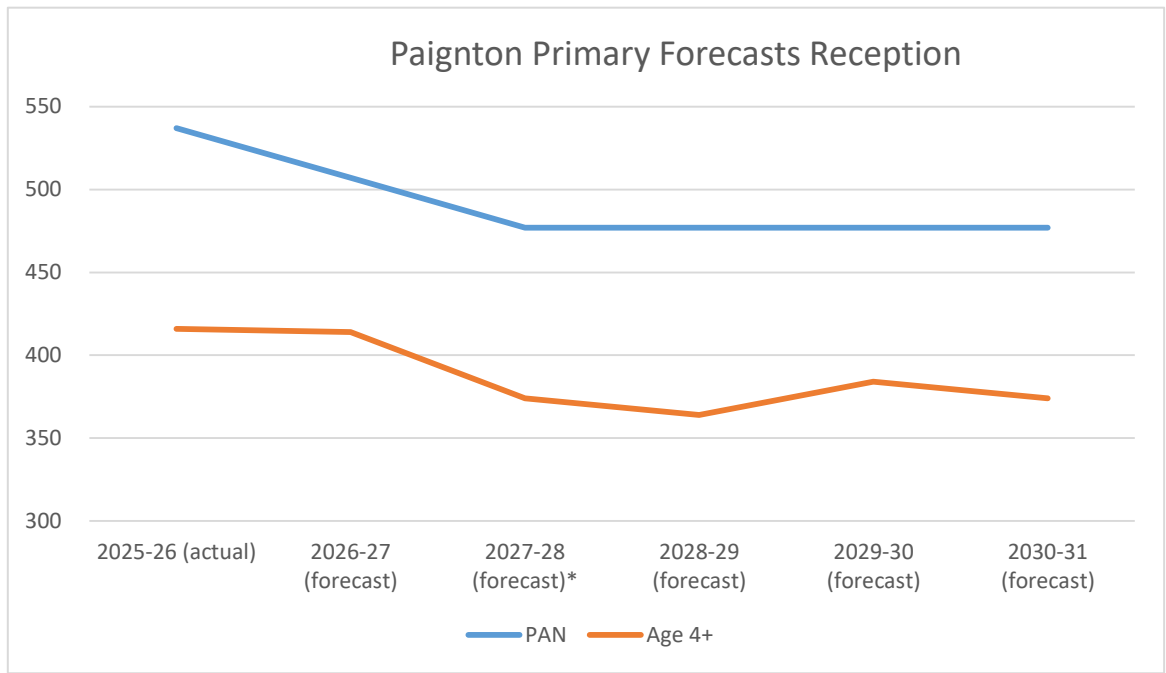
**OVERVIEW**

- Torquay has experienced the lowest drop in birth rates; only 517 births in 2024 compared to 770 in 2015.
- Current projections show there is sufficient capacity at primary level for the foreseeable future; however, increasing concern over the level of surplus which is expected to reach 27% by 2029.
- Several primary schools have taken proactive action and reduced their PAN; other schools are considering taking the same action to manage the impact of falling rolls.
- Potential growth expected from the Edginswell development but not at sufficient level to utilise all surplus.
- Last year of pressure at secondary level as the LA manages large cohorts of pupils moving up alongside the high levels of inward migration to the selective schools; 2025 data shows that the Year 7 cohort increased by 125% through the intake of out of area pupils. This is the highest it has ever been.
- Secondary intake numbers expected to peak in 2025 before dropping to more manageable levels from 2027 onwards.

## ACTIONS

- To continue discussions with local heads and Trusts regarding utilising surplus accommodation for SEND and Early Years provision – capital funding has been made available for both options by the DfE who recognise primary falling rolls as a national issue.
- There are currently no proposals to permanently remove any accommodation; all unfit accommodation has been removed during previous periods of falling rolls pre-2010
- The LA will continue a dialogue with planners over the proposed Edginswell development to understand the size of the development and delivery dates to ensure sufficient capacity is maintained.
- Officers will continue to closely monitor applications for 2027 intake to ensure there is sufficient capacity to meet demand.
- Latest position following Secondary Allocation Day in March is that all pupils that have applied, to date, have been offered a place for this September.

# PLANNING AREA: PAIGNTON



**Proposed housing developments with an anticipated pupil yield above historical level:**

Inglewood	373 houses mixture of starter and family homes – currently being delivered
Collaton Area	Total of 539 houses; permission has been granted for phase 1

**OVERVIEW**

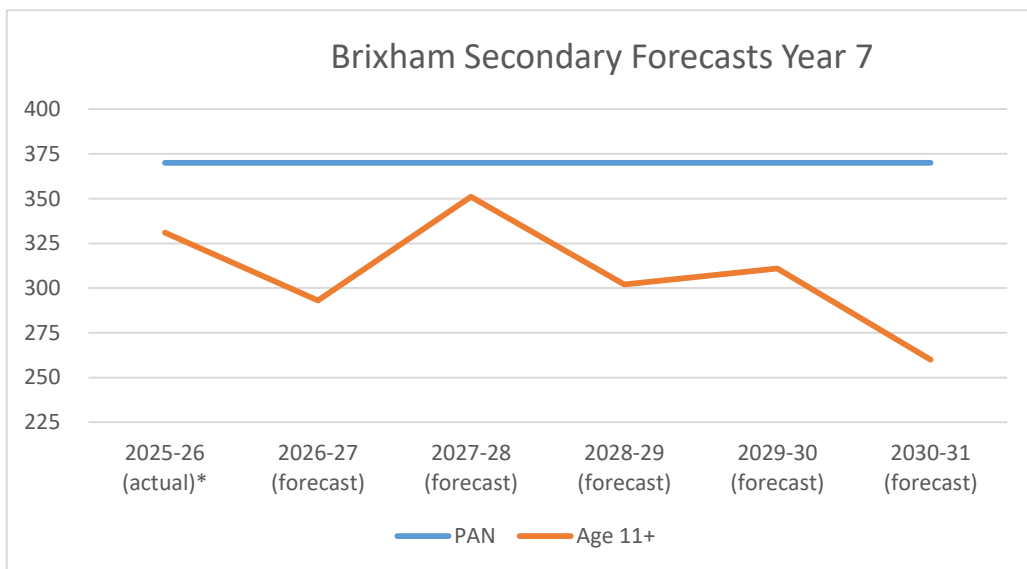
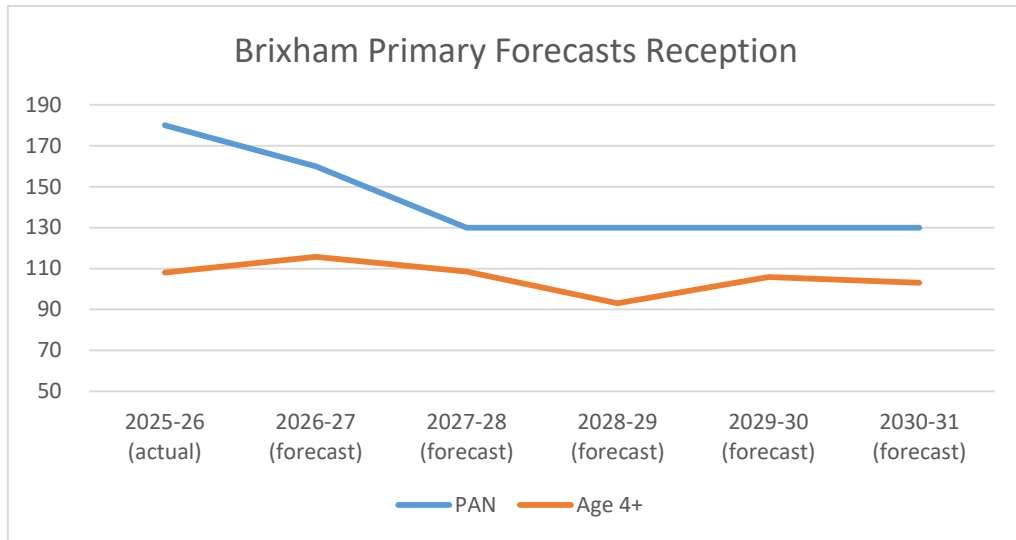
- Although Paignton continues to be an area of significant economic investment and large housing developments; the latest projections indicate that there will be a surplus of primary places for the foreseeable future.
- Any expected pupil growth from the large local housing developments has been counteracted by the low birth rate in the area. Last year, 2025, saw the lowest birth rate of 353 as opposed to 491 in 2012.
- At secondary level, demand peaks in 2025 before dropping to more manageable levels.

**ACTIONS**

- To continue discussions with local heads and Trusts regarding utilising surplus accommodation for SEND and Early Years provision – capital funding has been made available for both options by the DfE who recognise primary falling rolls as a national issue.
- There are currently no proposals to permanently remove any accommodation; all unfit accommodation has been removed during previous periods of falling rolls pre-2010

- To continue liaising closely with planners on the build out rate and local impact of above local developments. These are expected to utilise some of the surplus although challenge is often the location of the available places.
- With only one secondary school in Paignton the options for managing demand are limited and numbers are expected to drop from 2026.
- Historically, there is cross border movement between Paignton and Brixham at secondary level; projected surplus in Brixham from 2026 onwards will be available as an alternative to those on the edges of the Paignton area.
- The LA will maintain a watching brief on local transfer rates and the movement of pupils between areas.
- Latest position following Secondary Allocation Day in March is that all pupils that have applied to date have been offered a place for this September.

## PLANNING AREA: BRIXHAM



### OVERVIEW

- Brixham continues to face falling primary cohorts in line with the fall in birth rates. With no current or proposed housing developments above historical levels, this position is unlikely to change in the foreseeable future.
- Some schools have taken the proactive steps to temporarily reduce their planned admission number to better manage their roll and budgets.
- Place planning at secondary level is manageable as numbers begin to fall in line with primary numbers although worth noting the high level of inward migration to the Grammar School; in 2025 the Year 7 cohort ‘grew’ by 185% due to inward migration.

### ACTIONS

- To continue discussions with local heads and Trusts regarding utilising surplus accommodation for SEND and Early Years provision – capital funding has been made available for both options by the DfE who recognise primary falling rolls as a national issue.
- There are currently no proposals to permanently remove any accommodation; all unfit accommodation has been removed during previous periods of falling rolls pre-2010
- No further action is needed to meet demand in the area for secondary provision; it is expected that any surplus capacity will help to meet the demand from neighbouring Paignton.