

Schools Forum Meeting Agenda

Thursday, 24 September 2026 at 9.00 am
to be held in Teams - Virtual

Membership

Steven Hulme
Stuart Bellworthy
Tim Stephens
Steve Margetts
Alex Newton
Tamsin Summers
Laurence Frewin
Nik Salter

Sarah Tomkinson
Sally Banfield
Maria Beer
Nikki O'Dwyer
Katy Burns
Matt Burrell
Stuart Heron

1. **Apologies/Changes to Membership**
2. **Minutes of the last meeting** (Pages 3 - 10)
3. **Actions from June Meeting**
4. **Confirm Membership and Representation**
5. **Elect Chair and Vice-Chair**
6. **Review Terms of Reference** (Pages 11 - 18)
7. **Overview of DSG Blocks** (Pages 19 - 22)
8. **Updated budget monitoring, including High Needs pressures** (Pages 23 - 28)
9. **SEND Reform**
10. **Upfront SEND Funding**
11. **Early signals for modelling of formula options** (Pages 29 - 30)

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

MIke Freeman

12. **Early discussion of de-delegation and central retention** (Pages 31 - 34)
13. **Reminder of dates for the year**
- 12th November '26
 - 14th January '27
 - 18th March '27
 - 10th June '27
14. **Items for next meeting** (Pages 35 - 36)

Schools Forum – Formal Minutes

11th June 2026

1. Welcome, Apologies and Governance

The meeting commenced with a formal welcome and confirmation of apologies, which were recorded in advance.

Attendees

Alex Newton
Maria Beer
Sarah Tomkinson
Matt Burrell
Tim Stephens
Sam Poston
Hannah Baker
Rob Parr
Nik Salter
Steve Hulme
Gina Powell
Stuart Heron
Nikki O'Dwyer
Tamisin Summers

Apologies

Katy Burns
Sally Banfield
Laurence Frewin
Stuart Bellworthy
Clare Talbot
Steve Margetts

In line with the statutory remit of the Schools Forum, members fulfilled their responsibility to review financial matters relating to the Dedicated Schools Grant (DSG), provide scrutiny and advice to the Local Authority, and ensure transparency in decision-making affecting education funding across all sectors.

2. The minutes of the previous meeting were reviewed and approved as an accurate record, with no amendments required.

3. Review of Previous Actions

Members reviewed progress against previous actions. It was confirmed that the Schools Forum membership list has been updated and published in accordance with governance requirements.

The Local Authority confirmed that work had been undertaken to improve the presentation of place planning data, with a revised approach that reflects pupil numbers at class level to support clearer interpretation and more informed decision-making. Hannah Baker confirmed that, following Schools Forum feedback, a revised methodology for presenting place planning data has been developed. This approach will provide more granular information and will be brought back to the Schools Forum in September to support planning discussions, including the consideration of published admission numbers (PANs). [\[Schools Fo...Recording | Video\]](#)

In relation to grammar school admissions, Hannah Baker reported an increase in out-of-area pupils accessing places. She confirmed that further analytical work is underway to understand the drivers of this trend, including geographical patterns and parental preferences. A detailed update, including trend analysis, will be presented to Schools Forum in September to inform future planning and funding considerations. [\[Schools Fo...Recording | Video\]](#)

4. DSG Outturn and High Needs Pressures – Hannah Baker

Hannah Baker provided a detailed update on high needs pressures within the DSG, including Education Otherwise Than at School (EOTAS) and Alternative Provision (AP).

She confirmed that a comprehensive review of the EOTAS offer had been completed and a revised, fully compliant model has been implemented. As a result, the number of pupils accessing EOTAS provision has reduced from 74 to 55. [\[Schools Fo...Recording | Video\]](#)

She explained that the revised model provides a more structured and robust offer, including improved safeguarding oversight, regular contract management, and a stronger focus on academic outcomes. The increase in associated costs reflects the improved quality and compliance of provision rather than an increase in pupil numbers. [\[Schools Fo...Recording | Video\]](#)

In relation to Alternative Provision, Hannah Baker reported a sustained and increasing pressure across the system, with notable growth in demand from primary-aged pupils. She confirmed that this demand is linked to rising complexity of need, particularly in relation to social, emotional and mental health (SEMH).

Hannah Baker advised that, in line with Department for Education (DFE) expectations within SEND reform guidance, demand pressures are likely to continue over the short to medium term. The Local Authority is therefore planning on the basis

of a three-year trajectory, consistent with national assumptions that improvements in demand will not be realised until later phases of reform.

She confirmed that the strategic intention remains to reduce reliance on EOTAS through improved sufficiency of specialist placements and reintegration into mainstream settings, particularly for younger cohorts.

5. In-year budget monitoring

Rob Parr presented the budget for the 26-27 financial year. Forum noted that a £4.4 million deficit is set for the DSG and a discussion was held regarding the causes of this and possible mitigations.

6. SEND Reform Plan – Hannah Baker

Hannah Baker provided an update on the development of the SEND Reform Plan and associated DFE requirements.

She confirmed that the Local Authority is required to submit its SEND Reform Plan to the DFE by 19 June, with an outcome expected by 1 September. Approval of the plan is a necessary condition for accessing associated grant funding and financial support arrangements.

She highlighted that the SEND Reform Plan must align with national DFE guidance, including financial trajectories, data reporting requirements and workforce development expectations. Quarterly reporting to the DFE on both financial performance and outcomes will be mandatory under the new arrangements.

SEND Reform Plan attached.

Experts at Hand

Hannah Baker confirmed that funding has been allocated through the “Experts at Hand” programme, with approximately £971,000 available for the initial period from September to March.

She explained that the use of this funding is tightly prescribed by the DFE and must be used to deploy qualified professionals, including educational psychologists, speech and language therapists and occupational therapists, into educational settings.

In line with DFE expectations, the purpose of this programme is to build workforce capacity, improve early intervention and reduce reliance on statutory plans over time.

Hannah stressed the requirement for this to be an expansion of the offer: existing provision cannot be included. The local authority intend to co-produce a plan for what is needed alongside mainstream providers.

Specialist and Support Bases

Hannah Baker noted that national guidance relating to specialist and support base provision remains unclear, with only limited information available. She confirmed that local planning is therefore ongoing but subject to further DFE clarification before implementation decisions can be finalised. Planning is based on an assumption that 'support base' relates to a school's in-house provision and 'specialist base' can be interpreted as the new term for an ERP.

Governance and Schools Forum Role

Hannah Baker confirmed that new DFE guidance requires Schools Forum representation within the SEND governance structure (SEND Local Area Partnership Board).

She advised that Schools Forum members are required to determine the most appropriate representation model before the summer, ensuring that the Forum continues to fulfil its advisory role in relation to DSG governance and SEND reform oversight.

Action: Hannah Baker to share the paper containing the options for the representation model with the Chair, who will share with SF members. SF to hold an extraordinary meeting in July to agree the most appropriate model. The Chair will relay the decision to Hannah Baker in due course.

7. .

7. MACPT Funding Discussion – Stuart Heron

Stuart Heron presented a discussion on the introduction of the Multi-Agency Child Protection Team (MACPT), a national DfE-led initiative under the Family First programme.

He explained that the new model requires a multi-agency approach to child protection, involving police, health, social care, and education. For the first time, education is expected to contribute financially to a strategic post responsible for coordinating child protection processes, including case conferences and strategy meetings.

The estimated cost of the education contribution was outlined as approximately £90,000 per annum, based on equivalent roles in partner agencies.

Members discussed the challenges associated with funding this role, including:

- The absence of an existing funding mechanism spanning all education providers

- The administrative burden of collecting contributions across a large number of settings
- The need to ensure equity across all education sectors, including early years and post-16

Hannah Baker clarified that, in line with DfE expectations, this cost cannot be funded through the DSG or High Needs Block, as it is considered a mainstream, non-SEND responsibility.

The Schools Forum recognised that its role is advisory and not decision-making in this context but agreed to provide strategic input to inform discussions at the Transformation Board, where final decisions will be made.

There was agreement that any proposed funding mechanism must minimise administrative burden and ensure proportionality across providers.

8. Early Years sufficiency trends

No update on this area yet available.

9. Element 3 Funding Review – Hannah Baker

Hannah Baker presented an update on the review of Element 3 (top-up) funding arrangements.

She confirmed that the needs-led matrix approach, introduced in 2023, has now been fully implemented and evaluated through audit and feedback from Special Educational Needs Coordinators (SENCOs).

The review has identified areas for improvement to ensure greater equity across need types. In particular:

- Speech and language needs are currently underweighted and will be adjusted to reflect local demand.
- Restrictions on funding for certain needs (including cognition and SEMH) will be reviewed to ensure fairness.
- Greater flexibility will be introduced to reflect age-related differences and levels of required support.

Forum asked several questions about this paper. SF queried whether they were being asked to make a decision or if this was for information only. Hannah Baker confirmed it was for information only; SFG are not being asked to agree to this policy change.

Concerns were raised about the consultation process: the absence of a working funding matrix means members and education leaders cannot assess the impact of the proposed changes. Hannah Baker explained that this was not yet written as the local authority wanted to propose the changes first. It will be shared once complete.

Hannah Baker confirmed that these adjustments will apply to new Education, Health and Care Plans from September and to future phase transfers, while existing plans will remain unchanged.

She further confirmed that this approach aligns with current DFE expectations, while recognising that national reforms may introduce a standardised funding model in future years.

In response to a question about the potential risks of making the proposed age-related changes, Hannah confirmed that the change was to allow the flexibility for this to happen as *necessary*, rather than as standard. She explained that the plan writer would judge needs against the banding and a senior manager would moderate.

Forum raised concerns about the impact of these changes being made after providers have set budgets. It was agreed that any future changes would be considered earlier in the year to prevent reoccurrence.

10. Agreement of Priorities

As per annual work plan.

Actions Completed

- The Schools Forum membership list has been updated and published in accordance with governance requirements.
- The Local Authority has implemented improvements to place planning data reporting.
- The EOTAS review has been completed and a revised, compliant model implemented.
- The SEND Reform Plan has been developed and presented to Cabinet.

Actions to Do

- The Local Authority (Hannah Baker) will present **detailed place planning data** at the September meeting.

- The Local Authority (Hannah Baker) will provide a **full analysis of grammar school admission trends**.
- The Local Authority will provide **trend data on EOTAS and Alternative Provision** for Schools Forum oversight.
- Schools Forum members will determine and agree **representation on the SEND governance board** prior to the summer.
- The Local Authority will continue to provide **regular SEND reform updates**, including financial monitoring in line with DFE requirements.
- Rob Parr will explore and report back on a **proportionate funding mechanism for MACPT**, recognising the need to minimise administrative burden.
- The Element 3 funding review will be scheduled as a **standing annual item** on the Schools Forum work plan.

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TORBAY SCHOOLS' FORUM

Terms of Reference **February 2025**

Remit of the Torbay Schools Forum

1. By virtue of section 47A of the School Standards and Framework Act 1998 (as amended by the Education Act 2002), Torbay Council was required to establish a schools forum. These standing orders should be read in conjunction with appropriate legislation and relevant guidance.

The Schools Forum will be consulted on matters set out in the Schools Forums (England) Regulations 2012, that is:

- Amendments to the school funding formula
 - Arrangements for the education of pupils with special educational needs
 - Arrangements for the use of pupil referral units and the education of children otherwise than at school
 - Arrangements for early years provision
 - Administrative arrangements for the allocation of central government grants paid to schools via the local authority
2. Consultation must also take place when a local authority is proposing a contract for supplies and services which is to be funded from the Schools Budget and is in excess of the EU procurement thresholds. The consultation must cover the terms of the contract at least one month prior to the issue of invitations to tender.
 3. Specific delegated powers as outlined in guidance on matters such as the de-delegation of funding.

Membership of the Schools Forum

4. The majority of forum members must be “school and academy members” (see paragraph 5). Up to 33% of the forum’s total membership may be appointed from other organisations.
5. School and academy members must be Headteachers (or deputy Headteacher or bursar elected on behalf of a Headteacher) or governors. They must represent nursery, primary and secondary schools and the relative number representing each should take account of the relative numbers of pupils in those sectors. Membership of the secondary sector should include one representative from selective schools. There must be representation of special schools and the PRU.

The membership of the Torbay Schools Forum will comprise 13 school members and 2 non-school members, as set out below:

School Members		
Sector	Headteacher	Governor
Primary*	1	1
Primary Academy*	3	1
Secondary	1	1
Secondary Academy	2	1

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Special Schools	1	0
PRU	1	0
<i>* at least one primary school member will also be a representative with a nursery</i>		
Non-School Members		
Sector	Representative	
Early Years PVI	1	
14-19 Provider	1	

6. No Academy shall be represented by more than one person on the Forum, unless there are no other nominations from that particular sector, or it is as a result of substitution.
7. Schools members will be elected by that group according to an agreed process.
8. Academy members will be elected by the proprietary bodies of the academies in the local authority's area.
9. In relation to the non-school members, the 16-19 representative will be elected by 16-19 education providers. The early years' representatives will be appointed by the local authority after consultation with the Early Years Advisory Board.
10. If a group is unable to provide an elected representative the LA, in consultation with the chair of Schools Forum, will appoint an appropriate representative.
11. The term of office for members of the Schools Forum will be a maximum of three years, subject to their eligibility. At the end of their term of office, individuals may stand down or the group they represent may replace them. Should an individual wish to stand down upon expiry of their term of office, the clerk should be notified of this in writing before the Local Authority seeks nominations from within the relevant sector. There is no limit to the number of consecutive terms of office an individual may serve, subject to their eligibility, however any individuals wishing to remain a Forum member must notify the Local Authority.
12. The Local Authority may end the appointment of any Forum member before the expiry of his or her term of office if the member concerned ceases to hold the office by virtue of which he or she became eligible for appointment to the Forum.
13. Any resignations must be given in writing to the Clerk of the Forum.
14. The EFA will be entitled to nominate an observer who will be entitled to attend all meetings of the Forum.

Quorum

15. The Forum will be quorate when 40% of the members (excluding vacancies) are present.
16. The Forum can continue to meet if it is not quorate, but any advice given to the Local Authority as a result of such a meeting would not have to be taken into account by the

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Authority.

Non-attendance at Meetings and Substitute Members

17. Any member who is unable to attend a meeting may send an eligible substitute (who will have voting rights, as appropriate) on their behalf provided that the Clerk (or the Clerk) is notified in writing prior to the commencement of the meeting. For the avoidance of doubt, a Headteacher who has chosen to be a governor may not act as a substitute for an absent governor.
18. Any member who fails to attend two consecutive meetings of the Forum in a six month period may be asked to resign unless the Forum determines that the absences were authorised. This Standing Order applies even if the member has opted to send a substitute on their behalf.

Chairman and Vice-Chairman

19. The Chairman of the Forum will be elected annually from within the membership of the Forum at the first meeting of the academic year.
20. The Vice-chairman will be appointed annually from within the membership of the Forum.
21. The term of office of the Chairman and Vice-Chairman will be one year although there is no limit on the number of consecutive terms of office that an individual may serve.
22. In the absence of the Chairman at any meeting, the Vice-chairman will preside at the meeting. In the absence of the Chairman and the Vice-chairman at any meeting, a chairman for that meeting will be elected.
23. The person presiding at any meeting of the Forum may exercise any power or duty of the Chairman.
24. The Chairman and/or Vice-chairman shall cease to hold office if they resign from, or cease to be members of, the Forum. The election/appointment of a Chairman/Vice-chairman will then take place at the next meeting of the Forum.

Clerk

25. A Clerk to the Forum will be appointed from nominations from the Local Authority.

Meetings of the Forum

26. A minimum of four meetings of the Forum must be held each year.
 27. The Local Authority must arrange for meetings to be held to enable the Forum to be
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consulted on the issues listed in the Schools Forums (England) Regulations 2012

28. Meetings of the Torbay Schools' Forum will be held in public. However, there may be occasions when it is appropriate for the Forum to consider matters without the public and the press present. The Forum may by resolution exclude the press and public if a majority of those voting on the matter consider that because of the nature of the business to be considered it is appropriate to do so.
29. In addition, the Forum may, from time-to-time, invite the attendance of people with particular expertise to meetings. These people may speak but not vote.
30. Agendas, reports and minutes of the Torbay Schools' Forum will be published on the Council's website at www.torbay.gov.uk/education/schools/schoolsforum.
31. The Clerk will convene meetings of the Forum. Whenever possible, two weeks' notice of the date of meetings will be given. An agenda (together with any supporting documents) will be circulated at least five clear working days before the meeting, as far as is practicable.
32. The duration of the meetings will be a maximum of three hours unless agreed by the Forum.

Cancellation of Meetings

33. The Clerk will inform all parties concerned of the cancellation of any meetings of the Forum.

Voting

34. Unless these Standing Orders or the law provides otherwise, any matter will be decided by a simple majority of those members voting and present in the room at the time the motion was put.
35. If there are equal votes for and against, the Chairman (whether or not he or she has voted) will have a casting vote. There will be no restriction on how the Chairman chooses to exercise a casting vote.
36. The Chairman will take the vote by show of hands unless it is agreed that a secret ballot should take place, in which case the Clerk to the Forum will circulate voting slips to all members, collect and count the votes and announce the results immediately. The numbers of those voting for, against or abstaining will be recorded in the minutes.

Urgent Decisions Taken Under the Five-day Rule

37. With the agreement of the Chairperson, if an urgent decision is required and it is not practical to call a special meeting of the Forum a paper shall be circulated via email to all Members of the Forum. The circulation of the paper will trigger a period of five working days during which members can give consideration. If before the end of the five-day period any member wishes to raise an issue regarding the content of the paper they should inform the Clerk. If the issue cannot be resolved the paper will be deferred for consideration at the next meeting

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of the Forum. If there are no objections to the proposal(s) the paper will be deemed to be approved by the Forum on the expiration of the five working days period. All decisions taken under the five-day rule will be reported to the next available meeting of the Forum.

Record of Proceedings

38. The Clerk will provide minutes of the proceedings and decisions of the Forum. A copy of the minutes will be signed by the Chairman at the next meeting in order to approve them as a correct record.

39. Roles and Responsibilities

The constituent members of the Forum will be responsible for disseminating the decisions and consultation of the forum to the members they represent. Members will additionally be expected to seek the views of the group they represent, and communicate these effectively at meetings.

Conduct of Members of the Forum

40. Members of the Schools Forum are expected to act in accordance with the seven principles of public life: selflessness, integrity, objectivity, accountability, openness, honesty and leadership.
41. Individual members of the Schools Forum should consider their own position in relation to the declaration of interests and, in exceptional circumstances, may feel it appropriate to declare an interest and possibly withdraw from the meeting.

Expenses

42. Members of the Forum will be eligible to re-claim travel and other expenses in accordance with the Scheme of Allowances appended to these Standing Orders.

Indemnification for Members

43. The Local Authority will indemnify members against reasonable legal costs and expenses arising from recommendations made in good faith.

Terms of Reference

44. A copy of the Terms of Reference of the Torbay Schools Forum will be given to each member of the Forum.

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Allowances Scheme

1. Members of the Schools Forum who are Headteachers may claim any travel and subsistence allowance in line with their terms and conditions of employment
2. Members of the Schools Forum who are Governors must register as volunteers with Torbay Council in order to claim any travel and expenses allowance. The Council has no obligation to tax any payments to volunteers and does not send any returns to the Inland Revenue in this respect. Volunteers are responsible for reporting to the Inland Revenue any income which they have received that is taxable and it is recommended that they contact their local office if they have any questions.
3. Volunteers can only be reimbursed for actual expenditure and must submit a claim form including receipts (unless claiming for mileage).
4. Volunteers can claim 40p per mile for travel to and from Forum meetings.
5. An allowance of up to £5.84 per hour may be claimed by volunteers when a carer has to be engaged to enable that volunteer to attend meetings of the Schools Forum. The allowance will cover paid care for the following who live with the volunteer:
 - Children aged 15 years and under;
 - Elderly relative requiring constant care;
 - Disabled relative requiring constant care; or
 - Relative with learning disabilities requiring constant care.

The paid carer cannot be a member of the immediate family or household.

6. Any other members of Forum who are not entitled to claim under any other scheme (i.e. from the organisation they are representing) may claim travel and expenses allowances in line with paragraphs 2-5 above.
7. If there is a financial consequence to a school by a representative attending a meeting of the Torbay Schools Forum, a claim may be made under the relevant allowances scheme.

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FINANCE & GOVERNANCE REFRESHER

Dedicated Schools Grant

The four funding blocks, statutory duties and key governance considerations

Purpose A concise refresher to support confident participation in Schools Forum, SEND governance and wider education finance discussions.

The **Dedicated Schools Grant (DSG)** is the ring-fenced grant paid by the Department for Education to local authorities to support the schools budget. It is divided into four blocks: Schools, High Needs, Early Years and Central School Services.

The four DSG blocks

Block	Primary purpose	Key points
Schools Block	Mainstream school budgets	Funds primary and secondary schools through the national and local funding arrangements. It also includes provision for growth and relevant premises factors.
High Needs Block	SEND and alternative provision	Funds provision for children and young people with high needs, including special schools, specialist provision, top-up funding and alternative provision.
Early Years Block	Early education entitlements	Funds eligible early years entitlements and is distributed to providers through the local early years funding formula.
Central School Services Block	Local authority statutory education functions	Supports specified central functions for maintained schools and academies, including elements of admissions, Schools Forum and school organisation work.

Simple explanation DSG is the whole funding pot. The High Needs Block is the SEND and high-needs section of that pot.

Statutory duties linked to each block

1. Schools Block

The local authority's wider duties include:

- Securing sufficient school places.
- Promoting high standards of education and fair access.
- Operating admissions and place-planning duties.
- Implementing a compliant local funding formula in accordance with the applicable regulations and grant arrangements.

Discussion point Schools Forum has consultative and decision-making roles over prescribed funding matters, while the local authority remains accountable for discharging its statutory duties.

2. High Needs Block

The local authority's SEND and alternative provision responsibilities include:

- Identifying and assessing children and young people who may have special educational needs.
- Undertaking ehc needs assessments where the statutory test is met.
- Issuing, maintaining and reviewing education, health and care plans.
- Securing the special educational provision specified in an ehc plan.
- Arranging suitable alternative education where statutory duties apply.

Key message High Needs expenditure is closely connected to statutory responsibilities and assessed need. It is therefore not wholly discretionary.

3. Early Years Block

The local authority must operate national early years entitlements and associated funding arrangements, including:

- Securing sufficient provision to support eligible funded entitlements.
- Operating a local early years funding formula.
- Distributing funding to providers in line with national requirements.
- Collecting and returning prescribed information to the department for education.

Common discussion Provider sustainability, sufficiency of places, local funding rates and the proportion of funding passed through to providers.

4. Central School Services Block

The Central School Services Block supports specified central functions. Depending on the applicable funding regulations and local arrangements, these may include:

- School admissions.
- Schools forum administration.
- School organisation functions.
- Other permitted central or historic commitments.

Important distinction The block supports eligible central functions, but it does not define the full range of the council's statutory education responsibilities.

Governance essentials

Ring-fenced grant	DSG must support the schools budget and must not be used for unrelated council purposes. The Secretary of State may recover grant where conditions are not met.
Transfers between blocks	Transfers are governed by national rules. Depending on the type and scale of transfer, consultation, Schools Forum approval and/or Department for Education approval may be required.
Schools Forum role	Schools Forum advises on school funding matters, makes decisions where regulations prescribe and provides scrutiny and challenge. It does not set or remove the local authority's statutory duties.
Financial accountability	Local authority officers and the Chief Finance Officer retain formal responsibilities for proper deployment, reporting and assurance in relation to the grant.

Questions members often ask

Why is the High Needs Block under pressure?

Because local authorities must meet statutory SEND responsibilities and secure appropriate provision. Changes in assessed need, EHC Plan numbers, placement patterns and costs can therefore affect expenditure.

Can Schools Block funding simply be moved into High Needs?

No. Transfers are subject to the national funding framework and may require Schools Forum and/or Department for Education approval.

Can the council use DSG for other services?

No. DSG is ring-fenced for the schools budget and must be deployed in accordance with the conditions of grant.

Does Schools Forum decide whether statutory duties apply?

No. Statutory duties arise from legislation. Schools Forum's role concerns consultation, prescribed decisions, scrutiny and advice on the use of education funding.

One-sentence summary The DSG is a ring-fenced education grant divided into four blocks: Schools, High Needs, Early Years and Central School Services. Together, the blocks support mainstream school funding, statutory SEND and high-needs provision, early years entitlements and eligible central education functions.

Confident participation: a practical checklist

- Which DSG block is being discussed?
- Is the proposed expenditure linked to a statutory duty, a grant condition or a local policy choice?
- What decision is Schools Forum being asked to make: note, advise, approve or recommend?
- Are any block-transfer rules or Department for Education approvals relevant?
- What is the impact on children, settings, schools and longer-term financial sustainability?

Key reference sources

Department for Education, **Dedicated schools grant (DSG): 2025 to 2026**

<https://www.gov.uk/government/publications/dedicated-schools-grant-dsg-2025-to-2026>

Department for Education, **DSG: conditions of grant 2025 to 2026**

<https://www.gov.uk/government/publications/dedicated-schools-grant-dsg-2025-to-2026/dsg-conditions-of-grant-2025-to-2026>

Note: This is a concise governance refresher rather than legal advice. Current regulations, conditions of grant and Department for Education guidance should be checked for any live funding decision.

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Forecast Year End Position 26/27 – Schools Forum 24/9/26

Dedicated Schools Grant (DSG) has been set for 26/27 with a deficit budget of £4.4m.

Dedicated Schools Grant (DSG) funded activities in 26/27 are currently forecast to **overspend by £5.220m (before Early Years 25/26 adjustment)**.

Many of the budgets below are demand led and will be monitored during 26/27 and revisions reported accordingly.

Budget Heading	Current Budget £	Spend to date £	Forecast year end £	Over / (Under) £
Early Years – Under 2's and 2, 3 & 4 yr old payments – PVI's, Schools & Academies	16,774,900	7,389,800	16,895,500	120,600
Early Years – ALFI	486,600	189,500	450,000	(36,600)
Early Years – Deprivation (IDACI)	303,000	303,000	303,000	0
Early Years – Pupil Premium	210,900	78,100	200,000	(10,900)
Early Years – Disability Access Fund	125,800	17,600	52,700	(73,100)
Early Years – Retained element (2.6%)	463,400	202,900	435,400	(28,000)
Joint Funded Placements	175,000	61,400	85,000	(90,000)
Recovery of funding from schools for Excluded Pupils	(125,000)	0	(125,000)	0
Contribution from Health towards EHCP's	(150,000)	0	0	150,000
South Devon College Placements	1,675,000	562,000	1,675,000	0
Independent Special School Placements	3,400,000	1,332,400	3,535,000	135,000
Education other than at School (EOTAS)	1,888,100	650,000	1,865,100	(23,000)
SEND personal budgets	125,000	86,800	150,000	25,000
Alternative Provision	1,175,000	367,800	1,150,000	(25,000)
Supported Internships	10,000	0	10,000	0
Payments to / recoupment from other LA's for mainstream and Special School pupils	(540,000)	8,400	(540,000)	0
Medical Tuition Service	438,700	192,600	438,700	0
Virtual School / Hospital Tuition / Vulnerable Students Team	675,100	234,800	644,100	(31,000)
EHCP in-year adjustments for Primary & Secondary Schools (see additional breakdown)	1,000,000	1,179,700	1,650,000	650,000
Special Schools / High Needs in-year adjustments (see additional breakdown)	650,000	569,600	750,000	100,000
School Intervention / Commissioning / Parent Penalty Notices	(6,300)	4,800	(6,300)	0
Business Support / Business Intelligence	238,200	89,200	219,200	(19,000)
Senior Management, Central Recharges, Admissions, EAL / Travellers, SACRE	547,200	253,000	533,200	(14,000)
Visually impaired / Hearing impaired / Advisory Teachers	200,100	84,100	190,100	(10,000)
DSG set with a deficit budget for 26/27				4,400,000
Total - Forecast (in-year) year end position 26/27				5,220,000

Early Years termly pupil count error during 25/26 due to stretched offer miscalculation	583,000
Overall - Forecast year end position 26/27	5,803,000

Estimated 90% deficit write off by DfE of 26/27 DSG forecast year end position	5,222,700
Estimated 10% deficit remaining from 26/27 after DfE write off (to be met from Council Reserves)	580,300

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Special School and other High Needs funding adjustments for 26/27

	Combe Pafford	Combe Pafford	Mayfield School	Mayfield Chestnut	Mayfield Total	Brunel SEMH	Brunel SEMH	Lodestar AP	Lodestar AP	Totals	Totals £
Number of places - January 26	244		256	40	296	63		55		658.00	
Number of pupils - January 26	244		256	40	296	63		53		656.00	
Number of places - September 26	244		258	40	298	63		55		660.00	
		£			£		£		£		
Initial Place led funding		2,440,000			2,971,666		630,000		550,000		6,591,666
Initial Pupil led funding		1,853,668			3,921,994		1,240,935		749,791		7,766,388
Initial pupil specific additional funding		44,980			115,371		190,575		0		350,926
To mirror 3.4% increase in mainstream schools additional grant		139,080			221,389		60,984		44,165		465,618
Previously Core Schools Budget Grant		743,712			905,764		192,024		167,640		2,009,140
Historic funding previously paid as grant for Teachers Pay & Pensions		167,628			204,154		43,281		37,785		452,848
Other funding - Outreach / 6th day provision / rent		0			337,988		0		0		337,988
Pupil Premium		176,650			181,420		40,580		29,700		428,350
Total initial funding		5,565,718			8,859,746		2,398,379		1,579,081		18,402,924
In-Year adjustments	Pupils	Funding £	Mayfield Pupils	Chestnut Pupils	Funding £	SEMH Pupils	Funding £	AP Pupils	Funding £	Pupils	Funding £
April	238	(45,582)	258	40	6,693	65	58,586	57	76,588	658	96,285
May	238	0	258	40	10,002	63	(35,371)	55	(25,936)	654	(51,305)
June	238	0	258	40	0	60	(53,540)	59	63,824	655	10,284
July	238	0	258	39	(4,244)	59	(19,247)	55	(42,441)	649	(65,932)
August	238	0	258	39	0	59	0	55	0	649	0
September	242	205,342	256	40	(22,524)	61	29,939	55	0	654	212,757
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		159,760			(10,073)		(19,633)		72,035		202,089
Enhanced Provision (in-year changes in pupil top-ups)											6,505
Enhanced Provision (in-year increases in place numbers)											74,547
Excluded Pupils / 6th Day Provision - Mayfield (Sept - Mar)											73,471
Uplift for ASC pupils at Combe Pafford whilst school is in transition											213,022
In-year pupil specific additional funding		38,621			122,679		51,722				569,634
Total - In-Year adjustments		198,381			112,606		32,089		72,035		569,634
Special School / High Needs contingency budget											650,000
Current balance (under) / over											(80,366)

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Education, Health & Care Plan Funding for 25/26 & 26/27

	25/26	26/27	Increase / (Decrease)
Number of FTE's with EHCP	562	596	34.00
	£	£	£
Funding above £6k (element 3) allocated as a top-up per eligible pupil	4,051,151	4,802,849	751,698
Funding for new EHCP's and other in-year adjustments	650,000	1,000,000	350,000
In-Year adjustments			
April	14,298	136,071	121,773
May	259,186	301,974	42,788
June	73,664	162,308	88,644
July	54,308	73,200	18,892
August	81,865	506,119	424,254
September	254,033		
October	111,916		
November	149,925		
December	99,616		
January	138,530		
February	(34,485)		
March	11,700		
Total - In-Year adjustments	1,214,556	1,179,672	
Curent (underspend) / overspend	564,556	179,672	

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Schools Forum 24/9/26

Information for School Funding Formula modelling & other DSG for 27/28

1. There is currently very little information from DfE regarding the school funding formula for 27/28, this will be released later in the Autumn Term.
2. The Schools budget support grant which schools will receive in 26/27 to assist with funding the pay awards will be incorporated into DSG and therefore school allocations for 27/28.
3. We will continue to try and fund schools at the National Funding Formula unit values as we have done for a number of years. This will be dependent on the DSG funding settlement for 27/28 (not known until mid December).
4. Due to the Teachers' Pension Scheme decrease from 28.68% to 17.68%, DfE will be reducing school funding accordingly. This reduction nationally will be £3 billion.
5. The TPS reductions will be made by reducing the NFF unit values for AWPU, lump sum, minimum per pupil levels and FSM6 values.
6. It has not yet been confirmed whether the 90% write-off of DSG deficits will continue in 27/28 and beyond and is also currently reliant on the approval of SEND reform plan.
7. Due to the new DSG deficit write-off, it is not yet confirmed whether the 0.5% virement from Schools Block to High Needs will be permitted moving forward.

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SCHOOLS FORUM 24/9/26
 DE-DELEGATION FOR 27/28 - MAINTAINED PRIMARY & SECONDARY SCHOOL MEMBERS ONLY (figures based on 26/27 as 27/28 data not yet known)

DfE No.	School Name	Pupil Numbers NOR Oct-25	Eligible FSM Nos.	EAL Pupils	FSM Eligibility £	Insurance £	EAL £	Travellers Education £	Total De-delegation £
2469	Sherwell Valley Primary School	604	107	1.17	(840)	(9,042)	(246)	(749)	(10,877)
2460	Watcombe Primary School	198	68	2.37	(534)	(2,964)	(499)	(246)	(4,242)
2439	White Rock Primary School	580	110	3.38	(864)	(8,683)	(712)	(719)	(10,977)
	TOTAL PRIMARY SCHOOLS	1,382	285	6.92	(2,237)	(20,689)	(1,457)	(1,714)	(26,097)
4601	St Cuthbert Mayne School	917	378	74.00	(2,967)		(15,581)	(1,137)	(19,686)
4117	The Spires College	1,046	330	24.00	(2,591)		(5,053)	(1,297)	(8,941)
	TOTAL SECONDARY SCHOOLS	1,963	708	98.00	(5,558)	0	(20,635)	(2,434)	(28,627)
	TOTAL PRIMARY AND SECONDARY	3,345	993	104.92	(7,795)	(20,689)	(22,092)	(4,148)	(54,723)

	Unit Value per pupil £	Unit Value per FSM pupil £	Unit Value per EAL pupil £
Travellers Education - EAL	1.24		
Free School Meals eligibility		7.85	
Insurance	14.97		
Support to ethnic minority groups - EAL			210.56

Note: **Insurance** - The de-delegated funds from the schools meet the costs of the Council's corporate insurances which provides a comprehensive range of cover for Property, Legal Liability Employers and Public Liability including Governors Liability for LEA school functions, Business and School Journey Travel, Fidelity Guarantee, Personal Accident, Motor, Contractors All Risks and Terrorism cover.

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SCHOOLS FORUM 24/9/26 - CENTRALLY RETAINED SERVICES 2027/28 - ALL SCHOOLS

Number	Service Type	2026/27	Note
1	Planned Pupil Growth / Falling Rolls	£351,050	1
2	Schools Admissions Services	£155,679	2
3	Servicing the Schools Forum	£38,162	2
4	Retained element of Early Years (2.60% retained in 26/27)	£463,372	3
5	Funding moved from Schools Block to High Needs Block	£0	4

Notes:

- 1 PPG in 26/27 was required for continuing growth (additional year groups) for St Michael's Academy.
- 2 These figures have been taken from the Section 251 budget return to DfE.
- 3 The EY allocation for 26/27 (excluding DAF & PP) is £17.822m.
- 4 If a 0.5% virement had been actioned in 26/27 it would have been £560k. Although this was not actioned for 26/27, this may need to be looked at as an option in future financial years due to the continued pressures within the High Needs Block.

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Torbay Schools Forum - Annual Cycle of Work

Meeting	Element	Category	Who leads?	Statutory/Local practice	Narrative
June	Final DSG outturn	Information	LA officers	Statutory	Shows the final financial position for the previous year and highlights pressures carried forward. Required so the Forum understands the baseline before future decisions.
	First in-year monitoring	Information	LA officers	Statutory	Provides the first view of how the current year is tracking. Early variances help identify pressures that may influence autumn modelling.
	High Needs recovery plan update	Information	LA officers	Statutory	Updates the Forum on progress against any DSG deficit recovery plan. A key assurance requirement.
	Early Years sufficiency trends	Information	LA officers	Statutory	Shows take-up patterns in demand-led funding. Helps anticipate future adjustments.
	Identification of pressures	Information	LA officers	Local practice	Summarises emerging risks across blocks. Not required nationally but improves transparency and planning.
	Review of Annual Work Plan and agreement of priorities	Consultation	Chair	Local practice	Forum reviews annual work plan, makes any necessary changes and adds any one-off items as they identify themes and issues to focus on during the year. Shapes agendas and any working-group activity.
September	Review Terms of Reference; elect Chair and Vice Chair; confirm membership and representation	Decision	Chair/clerk	Statutory	Re-establishes effectiveness of Forum for the year ahead and ensures working as a truly representative body.
	Overview of DSG blocks	Information	LA officers	Local practice	Provides a refresher on the four blocks and statutory duties, supporting confident participation.
	Updated monitoring	Information	LA officers	Statutory	Second monitoring point of the year. Trends begin to solidify.
	Early signals for modelling	Information	LA officers	Local practice	Shares early indications of factors that may influence November modelling.
	High Needs pressures	Information	LA officers	Statutory	Keeps the Forum informed of High Needs volatility and recovery trajectory.
	Early discussion of dedelegation and central retention	LA organises consultation with schools	LA officers make outline proposals	Statutory	Required early consultation before November decisions. Ensures maintained schools have time to consider proposals.
November	Draft Schools Block allocations	Information	LA officers	Statutory	Presents provisional allocations based on the National Funding Formula.
	Modelling of formula options	Consultation	LA officers	Statutory	Shows scenarios, impacts, and trade-offs. The LA must propose the formula, consult with all schools and SF. The LA must then decide. .
	Final proposals for dedelegation	Decision	Chair	Statutory	LA must first propose de-delegation to the Forum and maintained school representatives must vote on the proposals in phases i.e. only primary reps vote on primary de-delegation.
	High Needs block transfer proposals	Decision	Chair	Statutory	Forum must be consulted on any proposal to move up to 0.5% between blocks. LA must propose and the SF decides. The LA can then refer to the DfE if it disagrees with the SF decision
	Updated monitoring	Information	LA officers	Statutory	Monitoring supports decision-making at this critical point.
	Final DSG settlement	Information	LA officers	Statutory	Forum receives confirmed allocations from the DfE.
January	Central Services Block proposals	Decision	Chair	Statutory	Forum must decide on any LA proposal on central retention and historic commitments.
	Planned spending on pupil growth	Decision	Chair	Statutory	Forum must decide on allocation of any LA proposal on growth funding.
	Confirmation of formula decisions and formal adoption of Torbay Scheme for Financing Schools	Decision	Chair	Statutory	SF confirms final formula decisions and any changes to Scheme. There are restrictions to voting rights.
	Updated monitoring	Information	LA officers	Statutory	Shows the position up to December and informs assurance discussions.
	Consider any formula disapplication requests by the LA	Consultation	LA officers	Statutory	Forum must be consulted prior to LA requesting DfE for disapplication
	Assurance on sustainability and risk	Information	LA officers	Local practice	Locally chosen item that strengthens transparency and governance.
	High Needs deep dive	Information	Working group?	Local practice	Detailed exploration of High Needs pressures, drivers, and mitigations.
	Pupil place-planning update	Information	LA officers	Local practice	
March	Early Years pressures	Information	LA officers	Statutory	Demand-led funding requires regular scrutiny.
	Central services review	Information	LA officers	Statutory	Forum must understand how statutory duties are being delivered.
	Updated monitoring	Information	LA officers	Statutory	Final monitoring point before outturn.
	Priorities for next cycle	Consultation	Chair	Local practice	Forum identifies issues to focus on in the coming year.

Understanding statutory duties vs. local practice	
The Schools Forum operates within a national regulatory framework. Some activities are required by law or national guidance, while others are locally chosen because they support good governance, transparency, or sector	
Statutory	
An item is statutory when:	
•	it is required by the Schools Forum (England) Regulations 2012
•	it is required by the Dedicated Schools Grant (DSG) conditions of grant
•	the local authority must consult the Forum before taking action
•	the Forum must vote (e.g., dedelegation, block transfers)
•	the Forum must be informed of specific financial positions or allocations
Examples include:	
•	receiving the final DSG settlement
•	reviewing monitoring reports
•	voting on dedelegation
•	considering block transfer proposals
•	reviewing disapplication requests
These items must appear in the annual cycle and must be handled in a specific way.	
Local practice	
An item is local practice when:	
•	it is not required by national regulation
•	the local authority or Forum includes it because it improves clarity, transparency, or planning
•	it helps members understand pressures earlier
•	it supports better decision-making later in the year
Examples include:	
•	priority-setting in June/July
•	early signals for modelling
•	deep dives into High Needs
•	central services reviews
•	working-group-led analysis
These items strengthen the Forum's ability to challenge, scrutinise, and plan, but they are not mandated.	

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