

Schools Forum – Minutes of Meeting

Date: 26 February 2026

Time: 08:55–10:40

Location: Microsoft Teams

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: Deputation 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.

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.