
Schools Forum

23/4/6

Meeting: Schools Forum

Meeting type: Scheduled meeting

Format: Microsoft Teams

1. Welcome and Introductions

The Chair welcomed members to the meeting and confirmed that the meeting was quorate. Members introduced themselves as required. It was noted that met for 30 minutes before the formal meeting, allowing time for informal discussion prior to the formal agenda.

2. Attendance and Apologies

Attendees

Alex Newton
Steve Margetts
Tim Stephens
Sarah Tomkinson
Matt Burrows
Nikki O Dwyer
Maria Beer
Katie Burns
Steve Hulme
Rob Parr
Stuart Heron
Laurence Frewin
Hannah Baker

Apologies received:

Stuart Bellworthy (main meeting)
Tamsin Summers
Claire Talbot (not expected to attend)
Sally Banfield had emailed the Chair to say she was unable to attend due to an emergency situation at her school.

3. Membership Update

The Chair confirmed that **Maria Beer (Governor, Sherwell Valley)** had joined the Forum as the maintained schools governor, meaning that all Forum positions were now filled.

The Forum was asked to confirm agreement to the updated membership, including Maria's appointment. Members indicated agreement.

Decision:

- Membership update, including Maria's appointment, was **formally agreed**.

Louise Willmott confirmed that she had already contacted Governance to request that the membership list at the top of the published agenda be updated, as it was out of date.

4. Minutes of the Previous Meeting

The minutes of the previous meeting were reviewed.

Key points noted:

- Discussion at the previous meeting regarding the clerking role for Schools Forum and the associated budget allocation.
- Confirmation was provided that **Mike** would be returning as the **formal clerk**, starting from the following month.
- Hannah Baker agreed to introduce Mike to the Chair.
- Outstanding actions from the previous meeting were reviewed, including:
 - Updating membership lists (pending Governance update).
 - Addition of the annual September membership review to future agendas (now included in the annual work plan).
 - Circulation of the annual work plan, which had been drafted by the Chair with support from officers and circulated to members.

Decision:

- The minutes were **approved as an accurate record**.
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5. Review of Action Tracker

The Chair proposed that the action tracker be reviewed outside the meeting by the Chair and Louise Willmott, rather than taking up significant meeting time.

Members agreed to this approach.

Decision:

- Actions to be reviewed offline and tracker updated and recirculated to the Forum.

6. Annual Work Plan

The Chair presented the proposed **annual cycle of work**, noting that:

- The cycle now begins in **June**, enabling earlier strategic discussion and planning.
- September meetings will focus on governance matters (membership review, election of Chair/Vice Chair).
- November/December meetings will support early financial modelling, subject to the timing of Department for Education (DfE) information.
- January and March meetings will support decision-making and planning for the following cycle.

Members discussed:

- Flexibility to add agenda items as new information (including SEND reform developments) emerges.
- The importance of aligning School Forum dates early to support diary planning.
- Limitations of the current agenda template due to the Mod.Gov system; potential amendments may be explored with the returning clerk.

Decision:

- The annual work plan was **formally adopted**.

7. SEND Reform and White Paper Update

Hannah Baker provided an **update on SEND reform and the local SEND Reform Plan**, highlighting:

- Requirement to submit a SEND Reform Plan by **19 June**, setting out a three-year trajectory.
- The plan is partnership-owned (Local Authority, ICB, Public Health, Adult Social Care).
- No requirement for Schools Forum approval at this stage, as the plan does not introduce new funding requiring Forum decision.

Please find the quote from the guidance here showing the route for the reform plan in terms of governance sign off:

The Local SEND Reform Plan should be discussed, agreed, and signed off at the relevant SEND Governance Board. As a minimum, the plan should be formally signed off by the Local Authority Chief Executive (CEO), the Integrated Care Board (ICB)

Chief Executive, the Local Authority Director of Children's Services (DCS), the Integrated Care Board NHS Place Director, and the Local Authority Chief Financial Officer (CFO/Section 151 Officer), reflecting the joint statutory responsibilities for SEND across the system.

- The area remains under an existing SEND Improvement Notice pending re-inspection (expected January).

Expert at Hand (EAH) Grant

Key points included:

- A ring-fenced **Expert at Hand grant** confirmed for three years.
- Provisional allocation for Torbay of **£971k in year one**.
- Funding intended to support outreach to **settings**, not individual casework.
- Lack of published DfE guidance is creating uncertainty around implementation.
- Grant funding and reform approval are dependent on DfE approval of the local plan.

Members discussed:

- Scope of Expert at Hand (including post-16 provision but not early years).
- Relationship with existing Educational Psychology and advisory services.
- Fairness of the funding formula and comparison with statistical neighbours.
- The importance of Schools Forum being informed, even if not a decision-making body at this stage.

It was agreed that a **high-level update** on the SEND Reform Plan should return to Schools Forum once the plan is further developed, likely at the June meeting.

8. Pupil Place Planning Update

Hannah Baker presented the pupil place planning paper prepared by Claire Talbot.

Key discussion points:

- Significant projected increase in Year 7 numbers in 2025, linked to grammar school intake patterns.
- Uncertainty regarding the proportion of Torbay versus out-of-area pupils gaining grammar school places.
- Risks to local place planning, staffing models, and transport budgets.
- Challenges created by falling birth rates alongside variable grammar school intake.

Members requested:

- Clearer tabular data showing PANs, allocations, surplus places, and projections across multiple years.
- Improved clarity to support strategic planning by schools and trusts.
- Continued engagement with grammar schools and DfE on forecasting assumptions.
- Analysis of where increase in out of area grammar school students were coming from (geographically) in order to understand reason for increase.

Concerns were also raised regarding:

- Financial sustainability of schools operating significantly below PAN.
- The need for more structured, collective discussions between schools, trusts, and the local authority.
- Long lead-in times required for formal PAN changes.

9. Items for Future Meetings

The following items were identified for future agendas:

- SEND Reform Plan update (high-level overview).
- Element 3 funding review (following completion of evaluation of the Islington model).
- Educational Psychology service arrangements and communications to schools and parents.
- Pupil place planning – enhanced data presentation and ongoing monitoring.
- Clarification of meeting invitations (information vs decision-making).
- Consideration of MACPT / related funding implications, subject to further information.

Members were invited to email the Chair with additional agenda requests.

10. Any Other Business

Members reiterated:

- Pressure created by the volume of meetings and the importance of clarity in invitations.
- The need for consistent communication routes so information sessions are shared more widely when attendance is limited.

- Appreciation for the work undertaken to develop the annual work plan and manage emerging pressures.
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11. Close

The Chair thanked members and officers for their contributions and closed the meeting.

Consolidated Actions

- **Update Schools Forum membership list on official agenda template**
Owner: Governance team (via Louise Willmott)
Timescale: As soon as possible
- **Follow up with Sally Banfield regarding absence/apologies**
Owner: Louise Willmott
Timescale: After the meeting
- **Introduce Chair to returning Schools Forum clerk (Mike)**
Owner: Hannah Baker
Timescale: Before next meeting
- **Review and update Schools Forum action tracker and recirculate**
Owner: Chair and Louise Willmott
Timescale: Prior to next meeting
- **Circulate proposed dates for next academic year meetings**
Owner: Chair / Louise Willmott
Timescale: Following this meeting
- **Provide high-level update on SEND Reform Plan to Schools Forum**
Owner: Hannah Baker / SEND leadership
Timescale: June meeting
- **Analyse Expert at Hand funding trajectory across three years**
Owner: Rob Parr
Timescale: Short-term (informing future discussions)
- **Enhance pupil place planning data with tables showing PANs, allocations, and projections**
Owner: Claire Talbot / Place Planning Team
Timescale: For a future Schools Forum meeting
- **Develop clearer communication regarding Educational Psychology service changes for schools and parents**
Owner: SEND leadership (via Lorraine)
Timescale: As soon as guidance allows

- **Clarify meeting invitations to state whether attendance is for information, consultation, or decision**

Owner: Local Authority officers / Louise Willmott

Timescale: Immediate and ongoing