

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.	