Minutes of the Schools Forum

Held via Microsoft Teams
26th September 2026

-: in attendance :-

Alex Newton (Chair) Secondary Academy Head; **Steve Margetts (Vice Chair)** Secondary Academy Head; **Maria Beer** (Primary Maintained Governor); **Katy Burns** (Primary Academy Head); **Matt Burrell** (Secondary Academy Governor); **Laurence Frewin** (14-19 Provider Representative); **Stuart Heron** (Secondary Academy Governor); **Nikki O'Dwyer** (Primary Academy Head); **Nik Salter** (Early Years Provider); **Tim Stephens** (Primary Academy Governor); **Tamsin Summers** (Secondary Academy Head); **Sarah Tomkinson** (Primary Maintained Head); **Beth Woodward** (PRU)

1. Apologies/Changes to Membership

Apologies were received from Stuart Bellworthy and Sally Banfield. Members welcomed Beth Woodward to the meeting as new Head of the PRU, replacing Steven Hulme. It was noted that a number of membership changes were expected during the year. It was agreed that membership and sector representation would be reviewed in January 2027, with schools asked to confirm that they were content with their representatives.

Action: Chair/Clerk to review membership and representation in January 2027 and address anticipated vacancies.

2. Minutes of the last meeting

The minutes of the previous meeting were approved as an accurate record, with no amendments to the substance.

It was agreed that published minutes should identify contributors by role rather than by name wherever practicable.

Action: Clerk to use roles rather than individual names in published minutes.

3. Actions from June Meeting

The Forum reviewed the outstanding actions:

- Detailed place-planning information, including school- and year-group-level data and grammar school admission trends, remained in development. A Schools Forum-focused update would be brought to the November meeting and circulated in advance if available.
- Trend information on education otherwise than at school and alternative provision would be considered alongside the SEND Reform update because the policy context had changed.
- Schools Forum representation on the SEND governance board had been agreed and

implemented.

- A proportionate funding mechanism for the multi-agency child protection arrangements remained under development. It was confirmed that Schools Block funding could not be top-sliced for this purpose; a proposal was expected to be considered through the wider partnership arrangements.
- The timing and scope of future review of Element 3 funding would be determined in the context of the SEND Reform Plan.

Actions: Officers to bring detailed place-planning and admissions trend information to the November meeting; incorporate education otherwise than at school, alternative provision and Element 3 funding into future SEND Reform reporting.

4. Confirm Membership and Representation

Current membership was confirmed on an interim basis. Members noted that some representatives were covering more than one relevant perspective and that forthcoming vacancies should allow representation to be regularised.

The requirement for selective-school representation was queried and it was confirmed that Stuart Heron currently fulfils this requirement in his role as a governor. A full review was deferred until January 2027.

5. Elect Chair and Vice-Chair

As per the Forum Terms of Reference, nominations for the Chair and Vice Chair were discussed and voted on. Members unanimously agreed that the current Chair should continue in office. Stuart Heron was elected Vice-Chair.

The appointments were formally proposed, seconded and approved by a show of hands.

6. Review Terms of Reference

The February 2025 Terms of Reference were reviewed. Members requested clearer wording on matters for decision, consultation and information, aligned with the statutory Schools Forum guidance.

It was also agreed that references to “14–19” and “16–19” provision should be made consistent. Subject to the statutory wording, the document should use “further education” as the working term.

Members were reminded that a substitute may attend when a member is unavailable. The Forum supported an induction offer for new members covering the DSG blocks, governance responsibilities and the Terms of Reference.

Actions: Clerk to update the Terms of Reference using the accountability table from the statutory guidance; standardise the further-education terminology; develop an induction approach for new members.

7. Overview of DSG Blocks

Members received an overview of the four Dedicated Schools Grant blocks and were reminded that statutory duties arise from legislation rather than from the funding blocks themselves. The presentation summarised the responsibilities funded through each block, the restrictions on transfers and the Forum's role in approval and oversight.

The Finance representative confirmed that expenditure is reported to the Department for Education through the statutory Section 251 returns at budget-setting and year-end.

Members requested that future monitoring reports identify the relevant DSG block for each budget line, including where an item spans more than one block. The Forum also supported using the overview materials as part of new-member induction.

Action: Officers to show the relevant DSG block against items in future finance monitoring reports and circulate the overview materials.

8. Updated budget monitoring, including High Needs pressures

The Forum noted a forecast in-year DSG deficit of approximately £5.2 million against the £4.4 million deficit assumed when the budget was set. The principal pressures were in-year EHCP top-up funding for primary and secondary schools and additional pressure in special-school High Needs expenditure.

A separate early-years adjustment of approximately £583,000 arose from a prior-year pupil-count calculation error. The Department for Education had advised that this should be carried forward and included in any future deficit write-off arrangement. The position remained dependent on confirmation of the national approach.

Officers reported low confidence that the in-year position could be recovered. Demand across children's services was increasing, placement sufficiency was constrained and some children were therefore being placed in higher-cost out-of-area or independent provision. The figures would be included in the SEND Reform quarterly return due at the end of October.

Demand for education, health and care needs assessments had increased substantially, including a marked rise in parental requests following uncertainty about national SEND reforms. Members also raised the level of health contributions. Officers confirmed that the matter was being escalated regionally. Any legally sensitive detail will be checked before publication.

Actions: Include the current forecast in the October SEND Reform monitoring return; continue regional escalation regarding health contributions; confirm before publication whether any legally sensitive information may be included.

9. SEND Reform

The Forum received an overview of Torbay's three-year SEND Reform Plan. National approval had been delayed, although initial feedback from Department for Education advisers had been positive. Approval was significant because it was expected to result in a 90% write-off of the accumulated deficit and release capital and programme funding.

The first phase would focus on launch and testing, followed by wider implementation from April 2027 to March 2029. This work would run alongside completion of the existing priority impact plan and preparation for a further inspection, creating significant capacity pressures.

Subject to approval, key elements included approximately £1.2 million of first-year capital funding for mainstream inclusion; approximately £900,000 for “Experts at Hand”, including occupational therapy, speech and language therapy, educational psychology and multidisciplinary support; and development of up to ten specialist bases across early years, schools and post-16 settings over three years.

The planned approach aimed to reduce reliance on independent placements and education otherwise than at school by increasing local specialist capacity and testing additional support through the Alternative Provision Specialist Taskforce. Quarterly monitoring would continue and might affect access to future funding.

The Forum agreed that “SEND Reform and funding implications” should become a standing agenda item. Once the plan outcome was known, members would receive a full overview of the three-year financial model, risks and expected impact, followed by deeper reviews of individual areas where required.

Actions: Circulate the Department for Education decision when received; add SEND Reform and funding implications as a standing agenda item; bring the three-year plan and financial forecast to the November meeting if approval is received.

10. Upfront SEND Funding

Members received an overview of the Department for Education consultation on upfront SEND funding for mainstream schools. The proposal could allow a local authority, with Department for Education approval, to increase the £6,000 additional-support threshold and transfer a proportionate amount from the High Needs Block to the Schools Block through a local inclusion factor.

The proposal remained at consultation and test-and-learn stage. No South West authority was known to have volunteered for the initial trial. Members noted significant unresolved questions about distribution, accountability and the effect on centrally provided support services.

The Forum agreed that Torbay was not currently in a position to be an early adopter. The item should return when further guidance and learning from test areas are available, likely in the new financial year.

Action: Bring the proposal back to the Forum when the consultation outcome and further national guidance are available.

11. Early signals for modelling of formula options

Officers reported that national information on the 2027/28 funding formula and DSG settlement remained limited. Current-year figures had therefore been used for early illustration.

Possible changes included the consolidation of grants into the DSG and a reduction associated with the teachers’ pension scheme grant, which could reduce school budgets while removing the corresponding cost. It was not yet known whether the option to transfer 0.5% from the Schools Block to the High Needs Block would be required.

Final values for de-delegated and centrally retained services would not be available in time for all decisions to be taken at the November meeting. De-delegation decisions would be taken

only by eligible maintained-school representatives, who were asked to consult the schools they represent. Centrally retained funding, planned pupil growth and falling-rolls support would require further modelling once the December DSG settlement was received.

Actions: Officers to keep members updated as national information becomes available; consult maintained schools on de-delegation; bring updated formula and centrally retained funding models to the Forum when the DSG settlement and supporting data are available.

12. Early Discussion of de-delegation and central retention

Members noted that decisions on de-delegated services are made only by eligible maintained-school representatives. Those representatives were asked to consult the primary and secondary schools they represent so that any future decisions reflect the views of the maintained sector.

The Forum also discussed centrally retained services, particularly funding for planned pupil growth and falling rolls. Officers explained that this funding had previously met planned growth costs, with any balance used to support schools at National Funding Formula rates. The final position could not be confirmed until updated allocations had been processed through the Authority Proforma Tool.

Action: Keep members informed as further information becomes available and ensure that maintained-school representatives consult their sectors before de-delegation decisions are taken.

13. Future Meeting Dates

- Thursday 12th November 2026, 09:30
- Thursday 14th January 2027, 09:30
- Thursday 18th March 2027, 09:30
- Thursday 10th June 2027, 09:30