



Schools forum self-assessment toolkit

This toolkit provides local authority officers and elected members with a framework for assessing the strengths and weaknesses of their schools forum. The toolkit is designed as a set of questions which can be considered by individuals or the forum as a whole.

Question	Yes / No	Notes
1. Are meeting dates set in well advance and details (including time and venue) published in an accessible manner to enable interested parties to plan their attendance?	Yes	<p>Meeting dates for the forum are set in the October meeting for the following 12 months covering the next 4 meetings. Upon agreement by the forum the appointments are sent out to all members through an outlook appointment.</p> <p>Meetings are typically held on a Thursday and at a time of 1pm.</p> <p>Prior to the pandemic, meetings were held at County Offices Lincoln in Committee Room 1. Since the pandemic, the meetings have been held virtually. Discussions have taken place at the forum and the current position of members is to continue operating virtually, however this is being kept under review.</p>
2. Are meetings timed to coincide with key dates? (for example, reporting of funding formula)	Yes	The forum meetings take place in January, April, June and October to coincide with key reporting requirements and timely updates to the forum.
3. Are meetings held in an accessible venue to enable observers to attend easily?	Yes	<p>The current format of virtual forum meetings is accessible to the public via the Council's website, and meetings are recorded, which are also available on the Council's website.</p> <p>Observers physically attended forum meetings when they were held in County Offices.</p> <p>Observers can view meeting information via the public link on the website.</p>
4. Is there a dedicated website link for schools forum, is it current and regularly updated?	Yes	https://lincolnshire.moderngov.co.uk/mg/CommitteeDetails.aspx?ID=166

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5. Are the agenda and papers publicly available on the authority's website at least 6 working days in advance of the meeting?	Yes	Only in exceptional circumstances is this not achieved.
6. Are the papers published as a single document, so that users can download easily?	Yes	The papers are also electronically circulated to members of the forum.
7. If papers are tabled at the meeting, are they published on the website promptly after the meeting?	Yes	If such a situation arose as described (e.g. assessment of the affordability of the schools funding formula and its time sensitives), yes, the papers would be published to forum members and on the website.
8. Are draft minutes published a reasonable time (for example, within 2 to 3 weeks) after the meeting, rather than waiting until the following meeting?	Yes	Draft Minutes are published on the website as soon as possible after the meeting following internal checking by officers.
9. Are the minutes clear and unambiguous, with sufficient detail to illustrate the discussions, without reporting verbatim every point made?	Yes	The minutes summaries what was presented, any discussion that occurred and what actions were resolved for the transaction of business.
10. Is the constitution clear and appropriate? Including for example: <ul style="list-style-type: none"> - a clear process for ensuring proportional representation - the process for electing members and their tenure - the timescale for review is clearly set out - the process for dealing with repetitive non attenders 	Yes	<p>Lincolnshire's Schools' Forum Constitution and Membership advises on the composition of the forum and full details are provided regarding schools membership based on the number of pupils.</p> <p>The process for election is set out in section 4.10 of the constitution, which is supplemented by information circulated at the time of the election.</p> <p>Section 6(m) covers the process for a member who fails to attend three consecutive meetings.</p> <p>The constitution is reviewed annually.</p>

Question	Yes / No	Notes
11. Is there an induction pack or training programme available for new members?	Yes*	<p>An introductory email, welcomes new members in which a request is made of members' details including their substitute member. Further details include access to the meeting (i.e. a physical meeting or remote); details of meeting dates; website link to the forum home page, and a copy of the Schools Forum guidance and constitution for their information.</p> <p>*The Local Authority has reviewed the previous training offer that was in place to support new members or existing members requiring a refresh. The Local Authority is committed to providing an updated training offer for new members in the autumn term.</p> <p>The Local Authority is mindful of the changing schools funding landscape and the potential impact this may have on the Schools' Forum responsibilities.</p>
12. Is the election process clear and transparent? Representatives are elected only by the group they are representing, whether phase-specific for maintained schools, or by the proprietors of academies for academy members.	Yes	<p>An email is circulated to each sector along with a copy of a letter which explains the election process; a copy of the election timetable, and a copy of a nomination form.</p> <p>This email is sent to school leaders for maintained schools and Proprietors for Academies.</p> <p>Membership is reviewed annually in June to ensure it is fully representative of different school sectors and in proportion to the number of children allocated to each sector.</p>
13. Do the papers contain clear recommendations and indicate in a consistent manner whether the item is for information, consultation or decision?	Yes	<p>Recommendations are clearly listed on the front page of each report.</p>

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14. Is it clear to observers who attendees at the forum are representing? (for example, by use of name plates, indicating sector)	Yes	<p>For physically attended meetings, forum members have name plates, which are colour shaded to indicate the sector they represent.</p> <p>Each agenda pack includes a section: Membership of the Schools' Forum.</p> <p>The Schools' Forum Clerk asks members to confirm their attendance and confirms Local Authority officers in attendance.</p>
15. Does the chair manage the meeting well, ensuring that all are able to contribute to the agenda items, that no bias towards any sector is evident and that no single person or organisation is able to dominate the discussion?	Yes	The chair encourages interaction and engagement from all forum members.
16. Is there inclusive participation in discussions for all phases and types of members?	Yes	All forum members have the opportunity to express their views in discussions.
17. Do members actively canvass views and objectively represent their whole peer group at the forum and provide feedback after meetings?	Yes	<p>Forum members do provide views on the reports being presented, that involves representing Lincolnshire schools overall and their sector.</p> <p>It is the expectation of forum membership that they feedback to their sector.</p>
18. Where votes are required, is it clear who is eligible to vote for different items?	Yes	The voting arrangements are made clear in the report itself, and the chair relays this message to forum members.
19. Where votes are required, are the arrangements for recording the votes clear and unambiguous?	Yes	The constitution defines which item each sector is able to vote on. The report presented will also highlight when only one sector is allowed to vote. Voting is counted by a show of hands (in person), or through a roll call (virtually). The Chairman will ask those who are voting whether they are for / against / abstain from the vote.
20. Is there a system in place for a decision if votes are tied?	Yes	Lincolnshire's Schools' Forum Constitution and Membership: section 5(f): In the event of an equality of votes the Chairman shall have a second or casting vote.

Question	Yes / No	Notes
21. Is the operational & good practice guide used to regularly review the forum's adherence to good practice?	Yes	<p>Local Authority officers review the guidance periodically to ensure compliance.</p> <p>The Constitution will be reviewed annually at the June Forum meeting.</p> <p>Lincolnshire's Schools' Forum Constitution and Membership was formally approved on the 17 September 2021 by the Executive Councillor.</p>

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