



## **Notes of meeting of f40's Finance Managers Research Team**

**Monday 28 January 2019 at LGA, Westminster, London**

**Present:** Margaret Judd (Dorset CC); Howard Emmett (North Yorkshire CC); Malcolm Green (Herefordshire Council); Sarah Fogden (Oxfordshire CC); Adrian Fox, (Devon CC); Andrew Minall (Hampshire CC); Andy Thorne, (West Sussex CC); Peter Hughes (Stockport Council), Julia Harnden (ASCL); Janaki Try (Buckinghamshire CC); Karen Westcott, DTW and Doug Allan, Secretary to f40.

**Apologies:** Sam Ellis, School Funding Consultant; Simon Pleace and Ian Hamilton (Kent CC); Jon Lee (Cambridgeshire/Northamptonshire CCs); Caroline Brand (Worcestershire CC); William Wilkes (Staffordshire); Steve Reading (Cheshire East); Amy Nield (Trafford); and Christine Atkinson (ERYC).

### **1. Minutes of FMRT meeting on 24 Sept 2018**

The notes were agreed as an accurate record of the meeting.

### **2. The f40 Briefing Paper (November 2018) - Review**

DA and MJ updated the members on the meeting between f40 and DfE on December 5.

DA and MJ updated members on points raised at the Executive Committee on 16 January 2019

The briefing paper was reviewed and a range of amendments were made to re-order and strengthen f40's campaign aims. Reference was also made to lump sum and sparsity and the impact the National Funding Formula is having on small schools. It was noted that in North Yorkshire the concern around reduced funding for small secondary schools related as much to curriculum as to sparsity.

It was acknowledged that the briefing paper will need to reflect the additional £125m per annum, for two years, high needs funding that was announced in December 2018. It was queried whether this funding will eventually be base-lined or not.

There was a discussion about the Isos Partnership high needs research, which was recently commended by the Executive Committee. There is information in that research that can be extracted and used to back up f40 campaign demands.

An updated version of the briefing paper will be circulated for discussion in due course.

### **3. The f40 Modelling Narrative (reflecting changes to the Briefing Paper)**

DA and MJ said that the DfE had requested more detail on the Narrative of f40's funding model. However, they reported that it was a productive meeting and the DfE appeared to be interested in f40's approach to the National Funding Formula.

MJ said it was imperative for the group to continue with its needs-led approach to a funding model even though to date the DfE has not indicated a willingness to follow this model. What f40 is doing informs the whole funding debate and is the only needs-led model in existence. If nothing else, the DfE may extract information and ideas from it.

The FMRT committee discussed the structure and order of the Narrative. It was also agreed that the Narrative should consider social and pastoral demands placed on schools. MG, SF and AM agreed to survey a few of their schools on the demands being made and estimated costs involved.

MJ will update the Narrative in due course and will circulate a new version for comment. It will emphasise the group's demands for fairer funding in a more concise way. MJ agreed to carry out more detailed work on the document.

#### **4. Updating of the f40 modelling spreadsheet (to reflect the Briefing Paper and the Narrative).**

It was agreed that trying to work on a spreadsheet of this complexity in committee is impractical, therefore MJ agreed to undertake the work that reflects the changes to the Narrative.

JH stated that she would be happy to do any specific work that MJ identified as a separate, but linked, project.

DA appealed to all those present to respond as quickly as possible when MJ circulates updated information.

#### **5. f40 campaign summary**

DA stated that it had been raised at the Executive Committee meeting that a summary sheet, outlining f40's main objectives, would be useful. A short, one-page document can be produced once the modelling Narrative is agreed. This can be used for general information, specific campaigning and on the website.

KW indicated that there will be a meeting on February 18 to discuss this year's campaign strategy and this short document will be discussed.

#### **6. Ten-year financial planning**

JH reminded members that the Education Select Committee, chaired by Robert Halfon MP, had asked those attending to provide him with a ten-year education budget plan, but it was not available at that time.

ASCL has agreed to look at the issue and JH and her colleague Sam Ellis have been undertaking some preliminary work looking for an acceptable approach to long-term funding, liaising with MJ in recent weeks.

JH presented initial thoughts on how the issue could be handled in relation to Schools Block but said it did not detail fair distribution of budgets – just quantum. Members discussed the figures presented and agreed that it made a lot of sense and was worth developing further. It was acknowledged that a similar approach to High Needs Block and Early Years would be taken in due course. It was agreed that projections on these blocks would be considerably more difficult to deliver.

#### **6. Any other issues/business**

DA informed the group that Tony Foot from the DfE had indicated that he would like to meet with f40 again in late March or early April to discuss our updated Narrative and modelling.

DA reported that at the Collaboration meeting held on 23 January 2019 it was agreed that the key trade unions (NEU, NAHT and ASCL) would meet urgently and provide comprehensive funding analysis in support of a joint contribution to the Comprehensive Spending Review in a bid to seek agreement on key figures, such as shortfalls in funding, that can be used in campaigning. NAHT will organise the first meeting.