



Notes of meeting of f40's Finance Managers Research Team

Monday 24 September 2018 at LGA, Westminster, London

Present: Margaret Judd (Dorset CC); Anton Hodge (North Yorkshire CC); Malcolm Green (Herefordshire Council); Sarah Fogden (Oxfordshire CC); Adrian Fox, (Devon CC); Andrew Minall (Hampshire CC); Andy Thorne, (West Sussex CC); Julia Harnden (ASCL); Sam Ellis (School Funding Consultant); Peter Hughes (Stockport Council); Sian Dobson, Financial Adviser and Doug Allan, Secretary to f40.

Apologies: Simon Pleace and Ian Hamilton (Kent CC); Janaki Try (Buckinghamshire 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 meeting on 25 June 2018

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

2. Minutes of Executive Committee – 18 July 2018

DA stated that these were on the agenda as the Executive had considered the notes of the FMRT meeting held on 25 June and various issues need to be built-in to future modelling.

3. Financial Issues - Collaboration Meeting - 21 Sept 2018

The second Collaboration meeting included discussion of f40's Briefing Paper and modelling. All groups are hoping to be able to agree shortfall figures that can be presented in all campaign activity. This is dealt with more thoroughly in sections below.

4. DfE datasets – assessment undertaken and discussion

F40 was only given access to DfE datasets in September so there has been considerable delay in being able to undertake updating of f40 modelling from 2015-16 figures to 2018-19 figures. However, this work is underway now and initial outcomes were presented on screen. SD described her approach and findings so far. These will be refined and hopefully suitable for presentation to the Executive Committee on 15 October.

MJ indicated that she had been working with Andrew Beasley at the AEU on funding calculations, particularly determining inflation values across all factors in the formula. F40 and AEU are following a similar approach. Some form of validation would be desirable.

AM suggested that it is important that we all agree the principles that were the base of the initial modelling and there was general agreement that we are content.

SE said that the modelling is still highly relevant as it is the only activity-led model available and it is a benchmark for real costs of running a school. The model should be simple and, in his opinion, f40 has got things about right, with tests showing that the model produces per pupil funding at about the anticipated levels. He added that the model must identify the quantity of funding that the Treasury must provide to the DfE for school funding – the political sweeteners are something beyond that cost.

SF wondered why f40 should follow the DfE's position on protections (i.e. 1%) to ensure no school loses. Surely a fair funding model should remove all protections.

Agreed that the identifiable shortfall in schools block funding is around £2billion and shortfall in High Needs is likely to be around £1.5 billion. MJ and SD will undertake further detailed work to complete the modelling and substantiate these figures.

What about Early Years and Central Services????

5. f40's School Funding Briefing – Sept 2018

There was a discussion about the f40 briefing paper. DA indicated that the document could be adjusted but needs to be finalised for circulation to MPs with their invitation to the 15 October briefing in Parliament. The invitation will be despatched via VC Gary Streeter's office. Various minor suggestions for word change were offered and MG agreed to make appropriate alterations.

SE suggested it is important that f40 is able to answer questions that may be asked by politicians and media about what is a fair system? – how does f40 define fairness? We should identify what exactly we believe fairness will deliver e.g. equal opportunity for children everywhere.

There was some discussion about the value of f40's funding model and why an updated version is required. It was agreed that f40's activity-led, or "referenced to activity", modelling is the only benchmarking of its kind in existence and is therefore uniquely important. The government may have rejected the idea of similar planning, but it is important for f40 to have this benchmark as part of its funding argument and identifying what needs to change.

Those present agreed that it is unlikely that pupil premium is about to be mainstreamed into the schools' budget, and some argued that it might be best if it doesn't!

SE said it is important to have a test bed for the updated modelling – using exemplar schools. He agreed that he will be able to help in this area. ASCL may also be able to support this work.

6. Briefing of MPs – 15 October

There will be a briefing of MPs representing f40 areas at 5pm on Monday 15 October in Parliament. Save the date messages have already been issued and the main invitation will be issued week commencing 1 October via Gary Streeter's office. The Briefing Paper will be circulated with the invitation, so it must be finalised by 1 October.

MJ will deliver a presentation on the school funding situation post-NFF and what f40 is asking for by way of improvements to the formula.

7. Meeting with DfE officials

DA reported that in the near future he would be asking a further meeting with officials at the Department for Education in order to discuss our updated modelling and the Briefing paper.

8. League Table of LA Positions after NFF

There was a discussion about the merits of two possible approaches to establishing a league table. Both present issues, but FMRT decided it prefers a table (Margaret can you finish off this sentence please?)

9. Any other issues/business

F40 Executive Committee to meet here at LGA on 15 October 2018.