



Academies planning calendar

A summary of key dates and actions relating to academy funding, finance and trust compliance with their funding agreement.



September 2018	October 2018	November 2018	December 2018
<p>Information</p> <ul style="list-style-type: none"> Academies Financial Handbook 2018 comes into effect Condition Data Collection programme site visits commence (ongoing until autumn 2019) 	<p>Trust action</p> <ul style="list-style-type: none"> Complete autumn school census Academies must publicly consult by 31 January 2019 on proposed changes to admission arrangements for entry in September 2020, or if they have not consulted in the past 7 years <p>Information and published guidance</p> <ul style="list-style-type: none"> ESFA issues guidance on the 2017 to 2018 academies accounts return by 1 October ESFA issues guidance on the Condition Improvement Fund (CIF) 2018 to 2019 ESFA issues PE and sport premium conditions of grant and allocations for 2018 to 2019 academic year <p>Payment</p> <ul style="list-style-type: none"> ESFA makes the second quarterly pupil premium payment for the 2018 to 2019 financial year 	<p>Trust action</p> <ul style="list-style-type: none"> Deadline for new CIF 2018 to 2019 applicants to register on the online portal Complete land and buildings collection tool (LBCT) by 5 November 2018 	<p>Trust action:</p> <ul style="list-style-type: none"> Trusts submit their 2017 to 2018 audited financial statements, auditor's management letter and accounts submission coversheet by 31 December Deadline for bids for CIF 2018 to 2019 <p>Announcement</p> <ul style="list-style-type: none"> DfE announces schools revenue funding settlement for the next financial/academic year (2019 to 2020)
January 2019	February 2019	March 2019	April 2019
<p>Trust action</p> <ul style="list-style-type: none"> Complete spring school census Trusts submit their 2017 to 2018 accounts return by 22 January Trusts publish their 2017 to 2018 audited financial statements on their website by 31 January <p>Payment</p> <ul style="list-style-type: none"> ESFA makes the third quarterly pupil premium payment for the 2018 to 2019 financial year 	<p>Trust action</p> <ul style="list-style-type: none"> Academies must determine their admission arrangements for entry in September 2020 by 28 Feb Academies must publish their admissions appeals timetable for 2019 on their website by 28 February <p>Information and published guidance</p> <ul style="list-style-type: none"> ESFA confirms exceptional 2018 to 2019 post-16 in-year growth outcomes, and where academies receive growth as a result of a Letter of Comfort ESFA issues guidance on 2019 to 2020 funding allocations for open academies ESFA issues guidance on the 2017 to 2018 academies budget forecast return (BFRO) ESFA issues Year 7 catch-up premium conditions of grant and allocations for 2018 to 2019 financial year 	<p>Trust action</p> <ul style="list-style-type: none"> Academies must publish their admission arrangements for entry in September 2020 on their website and send a copy to their local authority by 15 March <p>Information and published guidance</p> <ul style="list-style-type: none"> ESFA issues academy revenue funding allocations for 2019 to 2020 by 31 March ESFA issues 16 to 19 allocations, including student support (16 to 19 Bursary Fund and free meals in further education where applicable) ESFA publishes 16 to 19 student support eligibility and operational guidance ESFA publishes CIF outcomes 	<p>Information and published guidance</p> <ul style="list-style-type: none"> ESFA makes live the form for trusts to claim national non-domestic rates (NNDR) for the 2019 to 2020 financial year ESFA publishes 16 to 19 funding regulations guidance and 16 to 19 funding rates and formula guidance for 2018 to 2019 <p>Payment</p> <ul style="list-style-type: none"> ESFA makes the final quarterly pupil premium payment for the 2018 to 2019 financial year
May 2019	June 2019	July 2019	August 2019
<p>Trust action</p> <ul style="list-style-type: none"> Complete summer school census Trusts submit their 2017 to 2018 budget forecast return: outturn (BFRO) by 18 May Trusts must submit their audited financial statements to Companies House within 9 months of the end of the accounting period which is 31 May <p>Published guidance</p> <ul style="list-style-type: none"> ESFA issues the 2018 to 2019 academies accounts direction ESFA issues guidance on the 2018 to 2019 budget forecast return (BFR) 	<p>Published guidance</p> <ul style="list-style-type: none"> DfE publishes academies sector annual report and accounts (SARA) ESFA issues guidance on the 2018 to 2019 academies budget forecast return (BFR) ESFA issues the 2019 Academies Financial Handbook <p>Payment</p> <ul style="list-style-type: none"> ESFA makes final payment for universal infant free school meals (UIFSM) for 2018 to 2019 academic year 	<p>Trust action</p> <ul style="list-style-type: none"> Trusts submit their 2018 to 2019 budget forecast return (BFR) by 27 July <p>Published guidance</p> <ul style="list-style-type: none"> ESFA refreshes the 16 to 19 interactive census tool on GOV.UK ESFA publishes the 16 to 19 sub-contracting controls guidance for 2018 to 2019 <p>Payment</p> <ul style="list-style-type: none"> ESFA makes the first quarterly pupil premium payment for the 2019 to 2020 financial year 	