



# Academies planning calendar

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



| September 2019   | October 2019   | November 2019  | December 2019   |
|--|--|--|---|
| <p><b>Information and published guidance</b></p> <ul style="list-style-type: none"> <li>Academies Financial Handbook 2019 comes into effect</li> </ul>   | <p><b>Trust action</b></p> <ul style="list-style-type: none"> <li>Complete autumn school census</li> <li>LBCT online form available from 1 October</li> <li>Academies must publicly consult by 31 January 2020 on proposed changes to admission arrangements for entry in September 2021, or if they have not consulted in the past 7 years</li> </ul> <p><b>Information and published guidance</b></p> <ul style="list-style-type: none"> <li>ESFA publishes guidance and workbook for the 2018 to 2019 academies accounts return</li> <li>DfE issues guidance on the Condition Improvement Fund (CIF) 2020 to 2021</li> <li>Audited financial statements can be submitted from 15 October</li> <li>ESFA publishes the 16 to 19 revenue funding allocation data for 2019 to 2020</li> </ul> <p><b>Payment</b></p> <ul style="list-style-type: none"> <li>Second quarterly pupil premium payment for the 2019 to 2020 financial year</li> <li>Key stage 2 moderation and phonics funding payment</li> <li>Universal infant free school meals payment for newly eligible academies</li> </ul> | <p><b>Trust action</b></p> <ul style="list-style-type: none"> <li>Deadline for new CIF applicants to register on the online portal</li> <li>Trusts complete and submit the LBCT return by 4 November</li> <li>Trusts complete and submit the school resource management self-assessment tool return by 14 November</li> <li>Accounts return online form available from 4 November</li> </ul> <p><b>Information and published guidance</b></p> <ul style="list-style-type: none"> <li>ESFA issues PE and sport premium conditions of grant and allocations for 2019 to 2020 academic year</li> <li>ESFA publishes the Academies Accounts Direction for 2019 to 2020</li> </ul> <p><b>Payment</b></p> <ul style="list-style-type: none"> <li>Teachers pay grant for the 2019 to 2020 academic year</li> <li>Primary PE and sport payment for 2019 to 2020 for terms 1 and 2</li> </ul>                           | <p><b>Trust action</b></p> <ul style="list-style-type: none"> <li>Trusts submit their 2018 to 2019 audited financial statements, auditor's management letter and accounts submission coversheet by 31 December</li> <li>Deadline for CIF bids</li> </ul> <p><b>Announcement</b></p> <ul style="list-style-type: none"> <li>DfE announces schools revenue funding settlement for the next financial/academic year (2020 to 2021)</li> </ul>  |
| <p><b>Trust action</b></p> <ul style="list-style-type: none"> <li>Complete spring school census</li> <li>Trusts complete and submit their audited 2018 to 2019 accounts return by 20 January</li> <li>Trusts publish their 2018 to 2019 audited financial statements on their website by 31 January</li> </ul> <p><b>Payment</b></p> <ul style="list-style-type: none"> <li>Third quarterly pupil premium payment for the 2019 to 2020 financial year</li> </ul>   | <p><b>Trust action</b></p> <ul style="list-style-type: none"> <li>Academies must determine their admission arrangements for entry in September 2021 by 28 Feb</li> <li>Academies must publish their admissions appeals timetable for 2020 on their website by 28 February</li> </ul> <p><b>Information and published guidance</b></p> <ul style="list-style-type: none"> <li>ESFA confirms exceptional 2019 to 2020 post-16 in-year growth outcomes</li> <li>ESFA issues guidance on 2020 to 2021 funding allocations for open academies</li> <li>ESFA issues Year 7 catch-up premium conditions of grant and allocations for 2019 to 2020 financial year</li> <li>ESFA issues 16 to 19 allocation calculation toolkits (ACT) containing funding factors and student numbers, to schools and academies</li> </ul>  | <p><b>Trust action</b></p> <ul style="list-style-type: none"> <li>Academies must publish their admission arrangements for entry in September 2021 on their website and send a copy to their local authority by 15 March</li> </ul> <p><b>Information and published guidance</b></p> <ul style="list-style-type: none"> <li>ESFA issues academy revenue funding allocations for 2020 to 2021 including 16 to 19 allocations (plus student support, 16 to 19 Bursary Fund and free meals in further education) where applicable</li> <li>ESFA publishes guidance and workbook for the budget forecast return outturn (BFRO) for 2020</li> </ul> <p><b>Payment</b></p> <ul style="list-style-type: none"> <li>Primary PE and sport payment 2019 to 2020 for newly eligible academies</li> <li>Year 7 catch up grant for the 2019 to 2020 financial year</li> <li>Free school meals supplementary grant</li> </ul> | <p><b>Trust action</b></p> <ul style="list-style-type: none"> <li>ESFA makes live the form for trusts to claim national non-domestic rates (NNDR) for the 2020 to 2021 financial year</li> <li>Online form for the budget forecast return outturn (BFRO) for 2020 available</li> </ul> <p><b>Information and published guidance</b></p> <ul style="list-style-type: none"> <li>ESFA publishes 16 to 19 funding regulations guidance and 16 to 19 funding rates and formula guidance for 2020 to 2021</li> <li>ESFA publishes 16 to 19 student support eligibility and operational guidance, including 16 to 19 Bursary Fund guidance</li> <li>DfE publishes the CIF 2020 to 2021 outcome</li> </ul> <p><b>Payment</b></p> <ul style="list-style-type: none"> <li>Final quarterly pupil premium payment for the 2019 to 2020 financial year</li> </ul> |
| <p><b>Trust action</b></p> <ul style="list-style-type: none"> <li>Complete summer school census</li> <li>Trusts complete and submit their BFRO for 2020</li> <li>Trusts must submit their audited financial statements to Companies House within 9 months of the end of the accounting period which is 31 May</li> </ul> <p><b>Information and published guidance</b></p> <ul style="list-style-type: none"> <li>ESFA publishes guidance and workbook for the budget forecast return three year (BFR3Y) for 2020</li> </ul> <p><b>Payment</b></p> <ul style="list-style-type: none"> <li>Primary PE and sport payment 2019 to 2020 for term 3</li> </ul> | <p><b>Trust Action</b></p> <ul style="list-style-type: none"> <li>Budget forecast return three year (BFR3Y) for 2020 online form available</li> </ul> <p><b>Information and published guidance</b></p> <ul style="list-style-type: none"> <li>ESFA issues the 2020 Academies Financial Handbook</li> <li>ESFA publishes the 16 to 19 sub-contracting controls guidance for 2020 to 2021</li> </ul>   | <p><b>Trust action</b></p> <ul style="list-style-type: none"> <li>Trusts complete and submit their budget forecast return for 2020 to 2021</li> </ul> <p><b>Information and published guidance</b></p> <ul style="list-style-type: none"> <li>ESFA refreshes the 16 to 19 interactive census tool</li> <li>DfE publishes the academies sector annual report and accounts (SARA)</li> </ul> <p><b>Payment</b></p> <ul style="list-style-type: none"> <li>Final payment for universal infant free school meals for the 2019 to 2020 academic year</li> </ul>   | <p><b>Information and published guidance</b></p> <ul style="list-style-type: none"> <li>ESFA publishes the Academies Accounts Direction for 2020 to 2021</li> </ul>   |