



Academies planning calendar

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



September 2020	October 2020	November 2020	December 2020
<p>Trust action</p> <ul style="list-style-type: none"> Complete and submit the 2020 budget forecast return three year (BFR3Y) by 29 September <p>Information and published guidance</p> <ul style="list-style-type: none"> Academies Financial Handbook 2020 comes into effect ESFA publishes key findings following the assurance work relating to academy trust financial statements, academy funding audits and financial management and governance reviews for the year 2019 to 2020 	<p>Trust action</p> <ul style="list-style-type: none"> Complete autumn school census Academies must publicly consult by 31 January 2021 on proposed changes to admission arrangements for entry in September 2022, or if they have not consulted in the past 7 years <p>Information and published guidance</p> <ul style="list-style-type: none"> ESFA publishes guidance and workbook for the 2019 to 2020 academies accounts return DfE issues guidance on the Condition Improvement Fund (CIF) 2021 to 2022 Audited financial statements submitted from 15 October ESFA publishes the 16 to 19 revenue funding allocation data for 2020 to 2021 <p>Payment</p> <ul style="list-style-type: none"> Second quarterly pupil premium payment for the 2020 to 2021 financial year 	<p>Trust action</p> <ul style="list-style-type: none"> Deadline for new CIF applicants to register on the online portal Accounts return online form available 10 November <p>Information and published guidance</p> <ul style="list-style-type: none"> PE and sport premium conditions of grant and allocations issued for the 2020 to 2021 academic year <p>Payment</p> <ul style="list-style-type: none"> First payment of the teachers' pay grant and teachers' pension grant for the 2020 to 2021 academic year First payment of the PE and sport premium for the 2020 to 2021 academic year 	<p>Trust action</p> <ul style="list-style-type: none"> Land and buildings collection tool online form available 15 December Deadline for CIF bids <p>Announcement</p> <ul style="list-style-type: none"> DfE announces the schools revenue funding settlement for the next academic/financial year (2021 to 2022)
January 2021	February 2021	March 2021	April 2021
<p>Trust action</p> <ul style="list-style-type: none"> Complete spring school census Trusts submit their 2019 to 2020 audited financial statements, auditor's management letter, internal scrutiny annual summary report and accounts submission coversheet by 31 January Complete and submit the land and buildings collection tool by 28 January <p>Information and published guidance</p> <ul style="list-style-type: none"> ESFA publishes outcomes of requests from LAs for changes to high needs places for the 2021 to 2022 academic year. Academies have 2 weeks to submit a query about the outcomes <p>Payment</p> <p>Third quarterly pupil premium payment for the 2020 to 2021 financial year</p>	<p>Trust action</p> <ul style="list-style-type: none"> Complete and submit the audited accounts return by 23 Feb Trusts publish their 2019 to 2020 audited financial statements on their website by 28 February Academies must determine their admission arrangements for entry in September 2022 by 28 Feb Academies must publish their admissions appeals timetable for 2021 on their website by 28 Feb <p>Information and published guidance</p> <ul style="list-style-type: none"> ESFA confirms exceptional 2020 to 2021 post-16 in-year growth outcomes ESFA issues guidance on 2021 to 2022 funding allocations for open academies ESFA issues 16 to 19 allocation calculation toolkits (ACT) containing funding factors and student numbers, to schools and academies 	<p>Trust action</p> <ul style="list-style-type: none"> Academies must publish their admission arrangements for entry in September 2022 on their website and send a copy to their local authority by 15 March Trusts complete and submit the school resource management self-assessment tool (SRMSAT) <p>Information and published guidance</p> <ul style="list-style-type: none"> ESFA issues academy revenue funding allocations for 2021 to 2022 including 16 to 19 allocations (plus student support, 16 to 19 Bursary Fund and free meals in further education) where applicable ESFA publishes guidance and workbook for the budget forecast return outturn (BFRO) for 2021 ESFA publishes the Academies Accounts Direction for 2020 to 2021 	<p>Trust action</p> <ul style="list-style-type: none"> ESFA makes live the form for trusts to claim national non-domestic rates (NNDR) for the 2021 to 2022 financial year Budget forecast return outturn (BFRO) online form available 16 to 19 revenue funding allocation business case for major data errors deadline 30 April <p>Information and published guidance</p> <ul style="list-style-type: none"> ESFA publishes 16 to 19 funding regulations guidance and 16 to 19 funding rates and formula guidance for 2021 to 2022 ESFA publishes 16 to 19 student support eligibility and guidance, including 16 to 19 Bursary Fund guidance DfE publishes the CIF 2021 to 2022 outcome <p>Payment</p> <ul style="list-style-type: none"> Final quarterly pupil premium payment for the 2020 to 2021 financial year
May 2021	June 2021	July 2021	August 2021
<p>Trust action</p> <ul style="list-style-type: none"> Complete summer school census Complete and submit the BFRO 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>Information and published guidance</p> <ul style="list-style-type: none"> ESFA publishes guidance and workbook for the budget forecast return three year (BFR3Y) for 2021 <p>Payment</p> <ul style="list-style-type: none"> Second payment of the teachers' pay grant and teachers' pension grant for the 2020 to 2021 academic year Final payment of the PE and sport premium for the 2020 to 2021 academic year 	<p>Trust Action</p> <ul style="list-style-type: none"> Budget forecast return three year (BFR3Y) online form available <p>Information and published guidance</p> <ul style="list-style-type: none"> ESFA publishes the 2021 to 2022 Academies Financial Handbook ESFA publishes the 16 to 19 sub-contracting controls guidance for 2021 to 2022 	<p>Trust action</p> <ul style="list-style-type: none"> Complete and submit the BFR3Y <p>Information and published guidance</p> <ul style="list-style-type: none"> ESFA refreshes the 16 to 19 interactive census tool DfE publishes the academies sector annual report and accounts (SARA) <p>Payment</p> <ul style="list-style-type: none"> Final payment for universal infant free school meals for the 2020 to 2021 academic year 	