



Business cycle wall planner 2015

Academies and free schools

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<p style="text-align: center;">January 2015</p> <p>Academies:</p> <ul style="list-style-type: none"> complete spring school census (opens 15 January) submit 2013 to 2014 accounts returns by 31 January – for trusts that prepared 2013 to 2014 financial statements and had at least one open academy as at 31 August 2014 publish 2013 to 2014 financial statements and value for money statements on their websites, by 31 January <p>EFA:</p> <ul style="list-style-type: none"> pays third of 4 pupil premium payments for the 2014 to 2015 financial year publishes guide to funding allocations for 2015 to 2016 for open academies launches online information form for academy auditors 	<p style="text-align: center;">February 2015</p> <p>Academies:</p> <ul style="list-style-type: none"> submit spring school census (by 11 February) publish their admissions appeals timetable for 2015 <p>EFA:</p> <ul style="list-style-type: none"> publishes guide to completing 2015 to 2016 budget forecast return for all academy trusts open as at 31 March 2015 publishes guide to funding allocations for 2014 to 2015 for academies opening between 1 April 2015 and 31 August 2015 publishes March accounts return and guidance for academy trusts that did not prepare audited financial statements as at 31 August 2014, or opened new academies between 1 September 2014 and 31 March 2015 publishes March accounts return online training video issues 2015 to 2016 final funding allocations covering pre- and post-16 provision, 16 to 19 Bursary Fund, Residential Bursary Fund, free meals and high needs students funding 	<p style="text-align: center;">March 2015</p> <p>EFA:</p> <ul style="list-style-type: none"> pays year 7 (Y7) catch-up premium for 2014 to 2015 publishes 2015 to 2016 budget forecast return online form confirms outcome of 2014 to 2015 pupil number adjustment exercise to academies and free schools on estimated pupil numbers 	<p style="text-align: center;">April 2015</p> <p>Academies:</p> <ul style="list-style-type: none"> publish and submit to their local authority their determined admissions arrangements for entry in September 2016 <p>EFA:</p> <ul style="list-style-type: none"> pays the fourth and final pupil premium payments for the 2014 to 2015 financial year publishes guide to funding allocations for 2015 to 2016 for academies opening between 1 April 2015 and 31 August 2015
<p style="text-align: center;">May 2015</p> <p>Academies:</p> <ul style="list-style-type: none"> complete summer school census -opens 21 May submit academy trusts' financial statements for academic year 2013 to 2014 to Companies House submit their March accounts return for the period ending 31 March 2015 – for academy trusts that did not prepare audited financial statements as at 31 August 2014 or opened new academies between 1 September 2014 and 31 March 2015 <p>EFA:</p> <ul style="list-style-type: none"> issues academies' accounts direction for trusts preparing 2014 to 2015 financial statements publishes residential funding scheme guides for 2015 to 2016 publishes Care to Learn 2015 to 2016 guide pays the second and final primary PE and sport grant payment for 2014 to 2015 academic year publishes guide to funding allocations for 2015 to 2016 for academies opening on 1 September 2015 	<p style="text-align: center;">June 2015</p> <p>Academies:</p> <ul style="list-style-type: none"> submit summer school census (by 17 June) <p>EFA:</p> <ul style="list-style-type: none"> publishes Academies Financial Handbook, applicable for the 2015 to 2016 financial year publishes updated guide to completing the 2015 to 2016 budget forecast return, for new academies open after 31 March 2015 makes devolved formula capital payment for 2015 to 2016 hosts webinar on 2015 to 2016 budget forecast return launches school capacity survey 	<p style="text-align: center;">July 2015</p> <p>Academies:</p> <ul style="list-style-type: none"> academy trusts open as at 31 March 2015 submit their 2015 to 2016 budget forecast return by 31 July submit school capacity survey data <p>EFA:</p> <ul style="list-style-type: none"> confirms pupil premium allocations for the 2015 to 2016 financial year pays the first of 4 pupil premium payments for the 2015 to 2016 financial year pays the first of 2 payments for 2015 to 2016 summer schools pays the second of 2 revenue payments for universal infant free school meals (UIFSM) for 2014 to 2015 publishes 2014 to 2015 accounts return and benchmarking return hosts webinar on the financial framework, including the 2014 to 2015 academies accounts direction and the 2015 to 2016 Academies Financial Handbook 	<p style="text-align: center;">August 2015</p>

September 2015	October 2015	November 2015	December 2015
<p>Academies:</p> <ul style="list-style-type: none"> • 2015 to 2016 Academies Financial Handbook comes into effect from 1 September 2015 • trusts intending to defer or submit dormant financial statements for 2014 to 2015 to notify EFA <p>EFA:</p> <ul style="list-style-type: none"> • pays the first 2015 to 2016 academic year general annual grant (GAG) payment, equal to one-twelfth of the annual allocation • starts publishing online training videos about academies revenue funding for 2016 to 2017 • issues desktop land and buildings valuations to academies that opened between April 2014 and March 2015 	<p>Academies:</p> <ul style="list-style-type: none"> • complete and submit autumn school census by 28 October (opens 1 October) • submit 16 to 19 Bursary Fund and residential 2014 to 2015 end of year MI return <p>EFA:</p> <ul style="list-style-type: none"> • publishes August accounts return online training video • pays the second of 4 pupil premium payments for the 2015 to 2016 financial year and publishes final allocations publishes online training videos and hosts interactive online training webinars on academies funding for 2016 to 2017 • publishes final funding allocations at institution level for 2015 to 2016 academic year 	<p>Academies:</p> <ul style="list-style-type: none"> • complete school workforce census (opens 6 November) <p>EFA:</p> <ul style="list-style-type: none"> • requests estimated pupil numbers and possible additional information to inform the 2016 to 2017 allocations process from a small group of academies on estimates • pays the first of 2 primary PE and sport grant payments for academic year 2015 to 2016 • pays the second of 2 payments for 2015 to 2016 summer schools 	<p>Academies:</p> <ul style="list-style-type: none"> • submit school workforce census (by 5 December) • submit academy trusts' audited financial statements, auditor's management letter and value for money statement for 2014 to 2015 by 31 December <p>EFA:</p> <ul style="list-style-type: none"> • hosts webinar on 2014 to 2015 accounts return for academy trusts • announces dedicated schools grant settlement and indicative pupil premium for the 2015 to 2016 financial year

[Useful information for EFA-funded providers](#), set out month by month, is also available on GOV.UK.

Some timing is indicative and may change. Updates on the delivery of the business cycle will be available in our e-bulletin and will feature in the online calendar on the EFA Information Exchange.

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