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Education & Skills
Funding Agency

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1. Information: academies budget forecast return update

Information to help trusts prepare for this year's budget forecast return exercises.

1.1 Budget forecast return outturn 2018

The online form for the budget forecast return outturn (BFRO) will be live from 9 April 2018. The online form will use the same IT platform used for the accounts return as part of our continued drive to improve arrangements for submitting financial returns.

The BFRO reports actual income and expenditure to the end of March 2018 and a forecast to the end of August 2018. We would expect trusts to prepare the BFRO after they have prepared their March management accounts.

The deadline for trusts, with schools open as at 31 March 2018, to submit their BFRO is 21 May 2018.

1.2 Trusts with new academies joining in February/March 2018

We have written to trusts with new academies that joined the trust in February or March this year to confirm that we do not expect to receive an in-year budget forecast for these academies. Instead, we've requested that trusts include their new openers and convertors in their BFRO return.

2. Information: reporting on payment performance

The Department for Business, Energy and Industrial Strategy has published [reporting requirements guidance](#) on the duty larger UK companies have to report, on a half-yearly basis, their payment practices, policies and performance for financial years beginning on or after 6 April 2017. The reporting duty will include some larger academy trusts.

The regulation was introduced under the [Small Business, Enterprise and Employment Act 2015](#) and BEIS has confirmed it applies to academy trusts.

Individual trusts need to identify whether they are in scope of the requirement to report for a particular financial year by reviewing whether they exceed the company size thresholds under the regulations, which are summarised on page 4 of the guidance.

Reporting is through an on-line portal, as set out in the guidance. You are encouraged to talk to your professional advisors about the new requirements.

3. Information: free meals in further education guide for 2018 to 2019

We have published the [free meals in further education guide for 2018 to 2019](#). The updated guide includes changes to eligibility for students and parents in receipt of Universal Credit.

4. Reminder: ESFA independent appeal panel complaints

Academies must instruct clerks that run their admission appeals to include a link to the [academy independent admission appeal complaints factsheet](#) in the panel's decision letter.

Please follow the statutory requirements in both the [school admission appeals code](#) and the [school admissions code](#) when organising admission appeals.

To limit the number of complaints made about independent appeal panels, and to ensure any complaints are dealt with as effectively as possible, we remind academies and clerks that:

- the panel must decide if the academy's admission arrangements complied with the requirements set out in the school admissions code and part 3 of the School Standards and Framework Act 1998
- the panel must then decide whether the academy's admission arrangements were correctly and impartially applied to the case in question

To ensure complaints about the panel can be administered quickly and efficiently academies are required to ensure their clerks keep an accurate and legible record of the appeal proceedings, including how the panel reached their decision.

5. Information: DfE-funded development for governance leaders and clerks

Academies can now access DfE-funded development for governance leaders and clerks.

The recently launched leadership programme aims to build the capacity of governance leaders (chairs, vice chairs, committee chairs), and support them to improve the effectiveness of their board.

There is a standard rate of £500 per board. Multi-academy trusts attract a higher rate of funding to enable providers to develop a richer and more intensive offer to eligible boards. For example, this might include:

- first-hand observation of the board to understand board dynamics
- more frequent contact with participants and/or members of the board
- more one-to-one coaching
- additional learning modules

The clerking programme aims to professionalise the quality of clerking so that governing boards receive the administrative and procedural information, advice and support they need to operate effectively.

We are contracting with a number of organisations to deliver the development. Academy boards are encouraged to consider all of the options carefully, before choosing which one is right for their situation.

You can read the [school governors professional development guidance](#) for details of the providers and what they offer.

6. Information: academies KS1/2 assessment monitoring and moderation arrangements

Academy trusts should ensure that their academies have an agreed and signed monitoring and moderation contract in place, with a local authority of their choice, for key stage 1 and key stage 2 assessments.

Academies and free schools have a responsibility to ensure that they have appropriate monitoring and moderation provision in place. You can find details in the [2018 KS1 assessment and reporting arrangements](#) and the [2018 KS2 assessment and reporting arrangements](#).

Please make sure your academies have confirmed their choice of LA for monitoring and moderation within the teacher assessment section of [NCA tools](#).

If you do not put these arrangements in place for 2018, you will be in breach of your funding agreement.

7. Information: calling all users of Information Exchange

Thank you to all of you who have given feedback so far about the Information Exchange system. To support the research, we want to talk to a broad mix of customers in different roles and organisation types. Your input will help us make user centred improvements and prioritise future developments.

Can you give us 45 minutes of your time to help us improve Information Exchange? We are flexible and can do this over the phone, via web meeting, visit you, or you can come to us at our Coventry location.

To share your views and experience, please fill in your information in this [short form](#) so we can contact you to arrange a time and date that suits you. The form will only take a few minutes to complete and will close on 30 March 2018.

If you have any questions please don't hesitate to contact us at pds.mailbox@education.gov.uk.

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