



Department
for Education

Condition Spend Data Collection (CSDC)

User guide

September 2019

Contents

Table of figures	3
Summary of changes this year	4
Who is this publication for?	4
This document provides guidance for multi-academy trusts and local authorities on how to submit the Condition Spend Data Collection (CSDC) return.	4
Checklist	4
Introduction	5
What is the Condition Spend Data Collection?	5
When is the deadline for submitting data?	5
Who to contact if you have a query	5
Part 1 – Accessing the data collection online portal	6
Part 2 – Entering data online	8
Notes on entering data	8
Using the excel template to upload your data	9
File upload	10
Adding project data directly to the online portal	11
Automatic quality checks/what to do if you get an error message	11
Editing data	12
Deleting spend data	12
Part 3 – Data Field Guidance	13
General	13
Part 4 – Category Definitions	14
Work Type definitions	14
Efficiency	15
Work Type categories	15
Main use of funding definitions	15
Main use of funding categories	16
Source of supplementary funding definitions	17
Source of supplementary funding categories	18
Part 5 – Submitting the return	19

Table of figures

Figure 1: Sign in page for DfE data collection portal	6
Figure 2: Example of the local authority Dashboard'	7
Figure 3: Example dashboard for your RB.....	7
Figure 4: End of year use of condition funds summary	8
Figure 5: How to download a blank school condition projects template	9
Figure 6: Example school condition projects template	10
Figure 7: How to upload your saved capital spend template.....	10
Figure 8: Adding data directly to your school condition projects dashboard	11
Figure 9: Supporting questions and declaration section of form	20

Summary of changes this year

The Portal has been updated following user research, the operational changes made are as follows:

- a user password reset has been added to the home screen to allow users to reset their own password as and when needed
- there has been user guidance notes added to the portal template to assist users in the correct approach to inputting data on to the portal template to avoid user errors
- the error alerts have been updated to note the specific error with any data submitted ahead of submission of the portal template, this will allow users to update the content specific to the error encountered

Who is this publication for?

This document provides guidance for local authorities and multi-academy trusts in receipt of School Condition Allocation (SCA) on how to submit the Condition Spend Data Collection (CSDC) return.

Checklist

1. Login to the CSDC online portal. It is suggested that you use Chrome as your browser. If you have used the portal before please use your log in details, alternatively contact DfE to register you as a user on the portal.
2. Enter your spend data either using the excel template or by adding directly to the portal. Remember to save periodically.
3. Check all projects using SCA funding have been added and data is correct.
4. Confirm that the data has been approved for submission by the Director of Children's Services or the Chief Executive (or equivalent).
5. Complete supporting questions and declaration.
6. Submit form to DfE.

Introduction

This document provides guidance on how to use the online portal and excel spreadsheet to submit your Condition Spend Data Collection (CSDC) return to the Department for Education (DfE). It also provides guidance on content and definitions that should be used in the return.

What is the Condition Spend Data Collection?

DfE is conducting the annual collection of data on each responsible body's (RB) use of the School Condition Allocation (SCA) for the 2018 to 2019 financial year (FY).

Data can only be submitted using the online portal and copies of the data sent by email will not be accepted. The portal will automatically display details of the SCA fund allocated to your RB for the 2018/19 FY.

When is the deadline for submitting data?

The 12th of November 2019. Any errors in the data must be corrected in the portal before the finalised data is submitted.

Who to contact if you have a query

If you have any queries, please contact:

ConditionSpend.COLLECTION@education.gov.uk.

Note: Screenshots of the portal included in this guide may show names of RBs or SCA allocations not applicable to you.

Part 1 – Accessing the data collection online portal

1. Open a web browser and navigate to the data collection portal:
<https://efadatecollections.education.gov.uk/sites/csd/>
2. Enter your username and password and sign in (see figure 1). Your username and password will be provided beforehand by DfE. This will be sent via email from donotreply@efadatecollections.education.gov.uk.

Note: You should receive a username and password on the day this data collection commences. If you do not receive this, please contact ConditionSpend.COLLECTION@education.gov.uk.

This is a different username and password to the SCAP Capital Spend Data, which is a different collection.

Sign in - DfE / ESFA Data Collection Portal

Username

Password

Sign me in automatically

[Forgotten your password ?](#)

[Forgotten your username ?](#)

Figure 1: Sign in page for DfE data collection portal

3. Click on the 'Local Authority Dashboard' or 'Multi Academy Trust Dashboard' link at the bottom of the welcome page. (see figure 2).

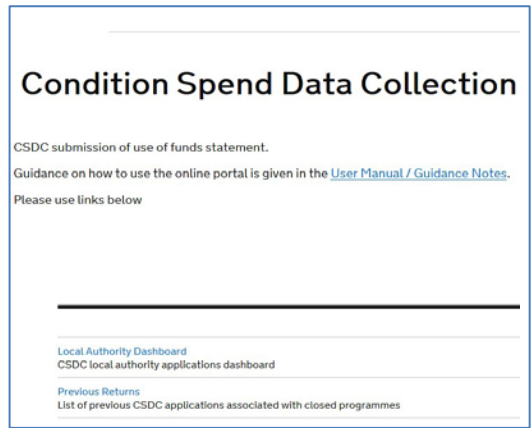


Figure 2: Example of the local authority dashboard

4. You should now see the dashboard page for your RB (figure 3).

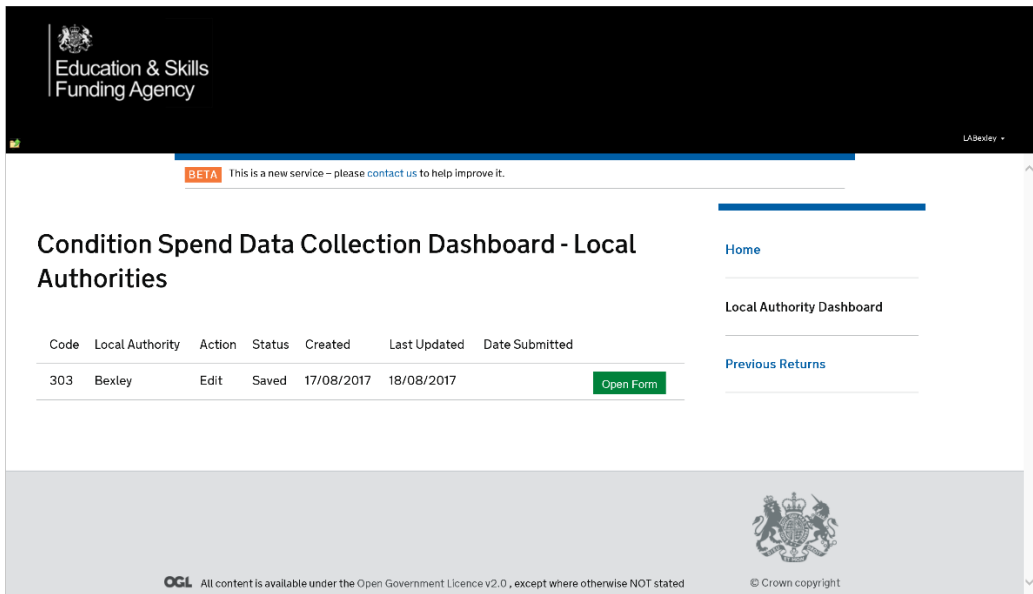


Figure 3: Example dashboard for your RB

Part 2 – Entering data online

Mandatory questions are indicated by a red star (*).

The form has automatic quality checks. If you have entered or saved data and a 'query' message appears on-screen, please correct/add/delete the data as per the 'query' message, then save.

Each line of data should represent a single project delivered during the financial year (FY).

Set 'category descriptors' must be used to describe each project and the forms include drop-down boxes under the headings 'work type' and 'primary use of funding'. Further details of these are given in Part 4 – Category Definitions.

The 'SCA summary' section may not automatically show the correct total of expenditure until you have saved.

Notes on entering data

- From the dashboard page (figure 3), select 'open form' to go to the top of the page: 'End of Year Use of Condition Funds Summary - financial year (FY) 2018-2019' (see figure 4).
- Check that the automated entry of your RB's name and the value of the SCA are correct. If there is an error, please contact: ConditionSpend.COLLECTION@education.gov.uk.

End of Year Use of Condition Funds Summary - financial year (FY) 2016-17

It is essential to complete sections of this form as indicated by **

Local authority summary

Local Authority Name

Bexley

SCA Allocation brought forward from previous year

£0

School Condition Allocation (SCA) 2016-17

£2,129,677

Total SCA Funding available 2016-17

£2,129,677

Figure 4: End of year use of condition funds summary

- You can upload your condition spend data to the online portal using two methods:
 - Using the excel template to upload your data (recommended)

- Adding project data directly to the online portal

Using the excel template to upload your data

We recommend uploading your data through the excel compatible spreadsheet. This allows you to assemble data offline, save and return to it when you want to, and check the data is correct before submitting to DfE.

The spreadsheet contains pre-set drop-down boxes which must be used.

8. Click the link 'Download blank school condition projects template' (see figure 5). At this stage, the portal may ask you to enter your username and password details again.

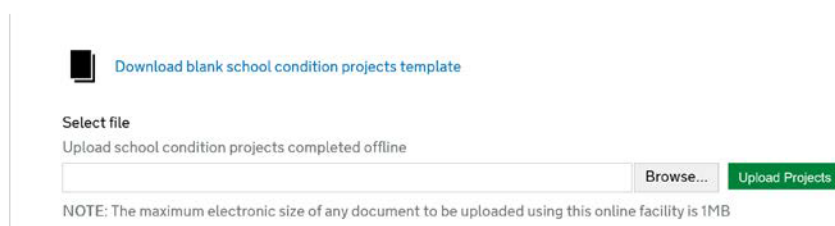


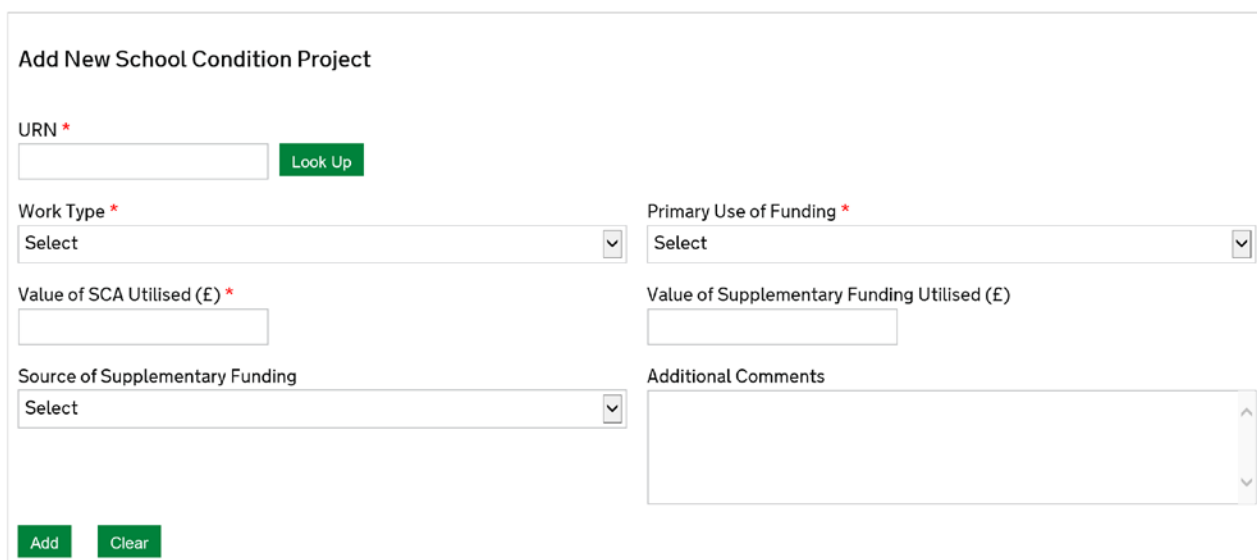
Figure 5: How to download a blank school condition projects template

9. Open the template and ensure you enable content and editing and then save to your local drive.
10. Enter the project data for each school that was in receipt of capital projects funding, supplied all or in part by the use of SCA (see figure 6).
11. You must use a separate line for each individual project and select the appropriate fields from the drop-down menus. The form will automatically populate the school details when you enter the school's current URN. To help you complete the form, please see guidance later in this document on definitions of the [data fields](#) and [category descriptors](#).
12. It is worth noting that some fields within the spreadsheet are pre-populated for example; when entering a correct URN this will pre-populate the establishment number, school name and postcode fields. If you also attempt to put a '£' at the beginning of a number value, this will throw out an error message as this is also pre-programmed. If you are having any problems with identifying a URN, please contact ConditionSpend.COLLECTION@education.gov.uk
13. Once complete, save your spreadsheet locally before uploading to the portal.

Adding project data directly to the online portal

As an alternative to using the excel template, data for each project may be entered directly to the portal.

17. On your School Condition Projects dashboard you can enter data directly into the boxes (see figure 8). Please begin by entering the URN for the school, which will then automatically populate the school's details.
18. Only the details of one project can be inserted at a time. To help you complete the form, please see guidance later in this document on definitions of the [data fields](#) and [category descriptors](#).
19. Once all information has been entered for a project, click 'Add'. After the project has been added, the data for that project cannot be edited. However, you can delete an incorrect line of data and add an amended record if you make a mistake.
20. Repeat the above steps to enter data for all of the projects you are submitting as part of the return.



The screenshot shows a web form titled "Add New School Condition Project". It contains the following fields and controls:

- URN ***: A text input field followed by a green "Look Up" button.
- Work Type ***: A dropdown menu with "Select" as the current selection.
- Primary Use of Funding ***: A dropdown menu with "Select" as the current selection.
- Value of SCA Utilised (£) ***: A text input field.
- Value of Supplementary Funding Utilised (£)**: A text input field.
- Source of Supplementary Funding**: A dropdown menu with "Select" as the current selection.
- Additional Comments**: A large text area with a vertical scrollbar.
- At the bottom left, there are two green buttons: "Add" and "Clear".

Figure 8: Adding data directly to your school condition projects dashboard

Automatic quality checks/what to do if you get an error message

21. The form has automatic quality checks. If you have entered or saved data and a 'query' message appears on-screen, please correct/add/delete the data as per the 'query' message, then save.

Editing data

22. The online portal **will not** allow CSDC returns that contain errors to be submitted. Any errors should be corrected before submitting your return. It is possible to save the record with errors for correction, but these must be corrected before submission.
23. The system will require an explanation to be entered in the 'additional comments/ use of surplus funds' box if the overall capital spend value is different to the SCA provided by DfE. Once a return has been submitted, DfE will review the content and will contact the RB if further explanation is required.

Deleting spend data

24. There may be the need to amend a project's data. On the main dashboard page, locate the project record to be changed, delete this and then re-enter the details to give a corrected record.

Part 3 – Data Field Guidance

This section gives guidance and definitions for the data fields that need completing in the CSDC. Separate guidance and definitions for the drop-down categories are given separately below.

Note: You should not include projects that are fully funded by any of the following programmes: Priority School Building Programme (PSBP); Free School Programme (includes Free Schools, UTCs and Studio Schools); Academies Capital Maintenance Fund (ACMF); and Condition Improvement Fund (CIF).

If you are using other funding as contribution to any of these centrally funded programmes, then you should record the other funding contribution only. If you record the total then we will ask you to correct the data.

General

Project details

- **School details:** Please enter/choose the school's URN if possible. All other school details should then be automatically updated. If you do not know your school's URN, you can look this up using [Edubase](#).
- **Multi-school projects:**
- **Multi-purpose projects:**
- **Area:**
- **GIFA:**
- **Units:**
- **Additional Comments:**

Part 4 – Category Definitions

This section gives guidance and definitions for the drop-down categories in the CSDC. Separate guidance and definitions for the data fields are given separately above.

Work Type definitions

Emergency works

Investment in immediate remedial works to major elements of premises (such as roofs, mechanical services, etc.) necessary to remedy actual, or prevent imminent, premises closure

Applies to: ‘Emergency works’ work type category

Compliance (health and safety)

Investment in the physical aspects of premises which do not meet statutory regulations, but which do not present an immediate threat of premises closure

Applies to: ‘Compliance and health and safety’ work type category

Condition

Investment in the physical state of the major elements of premises such as roofs, external walls, electrical services, external areas, etc.

Applies to: ‘Multiple block condition works’, ‘Single block condition works’, and ‘External (non-building) condition works’ work type categories

Sufficiency (including expansion or rationalisation)

Investment in total areas and the quantity and organisation of places within schools, in relation to demand for places.

Applies to: ‘Expansion - basic need’ and ‘Expansion - not basic need’ work type category:

- **Expansion - basic need:** expansion to provide new places to meet demand
- **Expansion - not basic need:** expansion other than to provide new places to meet demand

Suitability

Investment to improve how well the premises meet the needs of pupils, teachers, and other users

Applies to: ‘Suitability’ work type category

Efficiency

Investment in physical aspects of premises which directly result in a reduction in revenue costs such as energy, transport, etc.

Applies to: 'Energy efficiency' work type category

Work Type categories

- Block replacement
- Multiple block condition works – single element (roofs or mechanical services etc.)
- Multiple block condition works – multiple elements (roofs and mechanical services etc.)
- Single block condition works – single element (roofs or mechanical services etc.)
- Single block condition works – multiple elements (roofs and mechanical services etc.)
- External (non-building) condition works
- Emergency works
- Compliance and health and safety
- Energy efficiency
- Accessibility improvements
- Expansion - basic need
- Expansion - not basic need
- Suitability - teaching areas
- Suitability - non teaching areas
- Suitability - external areas
- Other (Please specify.....)

Main use of funding definitions

Multiple uses

Please disaggregate spend as much as possible. Where this is not possible please enter the main use of the funding.

Block extension

Expansion of an existing establishment through a new build.

Provision of new block (non-temporary building)

New block formed through a new build.

Provision of new block (temporary building)

Creation of temporary accommodation required for a short period of time or in an emergency following an incident.

Asbestos management/removal

Please include all asbestos related works in this category, do not include with other categories where possible.

Fire safety works

Please include all fire safety related works in this category, do not include with other categories where possible.

Main use of funding categories

- Provision of new block (non-temporary building)
- Provision of new block (temporary building)
- Block extension
- Fixed furniture and fittings – science
- Fixed furniture and fittings – catering kitchen (not curriculum facilities)
- Fixed furniture and fittings – general FF&F in teaching spaces
- Fixed furniture and fittings – general FF&F in non-teaching spaces
- Roofing
- Floors
- Stairs
- Ceilings
- Floors and stairs
- Floors, stairs, ceilings and redecorations
- Electrical services
- Mechanical services (including boilers and heating systems)
- Electrical and mechanical services (including boilers and heating systems)
- Electrical services, mechanical services (including boilers and heating systems), ceilings and redecorations
- Lifts
- External walls
- External windows
- External doors
- External walls, windows and doors
- External walls, windows and doors and redecorations
- Internal walls
- Internal windows

- Internal doors
- Internal walls windows and doors
- Internal walls windows and doors and redecorations
- Internal walls windows and doors, ceilings and redecorations
- Internal walls, windows and doors, ceilings, floors and redecorations
- Internal walls, windows and doors, ceilings, floors, redecorations and electrical/mechanical services (including boilers and heating systems)
- Redecorations (internal and/or external)
- Toilets
- Ceilings
- Playing fields
- External areas (excluding playing fields but including drainage and swimming pools)
- Structural strengthening works
- Asbestos management/removal
- Fire safety works
- Other (Please specify.....)

Source of supplementary funding definitions

You should **not** include projects that are **fully** funded by any of the following programmes:

- Priority School Building Programme (PSBP)
- Free School Programme (includes Free Schools, UTCs and Studio Schools)
- Academies Capital Maintenance Fund (ACMF)
- School Condition Improvement Fund (CIF)

If you are using SCA as contribution to any of these centrally funded programmes, then you should record the SCA contribution **only**. If you record the total then we will ask you to correct the data.

Multiple sources

Please enter the main source of supplementary funding.

Reserves

Funds set aside for capital expenditure. Not including council borrowing or council funds not already set aside. Not including revenue reserves.

Local Authority contribution (excluding section 106 funding)

Including council borrowing and council funds not already set aside as reserves.
Excluding section 106 funding.

Private funding

Please separate out Parent Teacher Association (PTA) funding.

Revenue allocation

Funding from revenue funding streams and/or revenue reserves.

Source of supplementary funding categories

- Reserves
- Local Authority contribution (excluding section 106 funding)
- Section 106 funding
- Private funding (not PTA)
- Private funding (PTA)
- Sponsor contribution
- DfE funding – emergency funding
- DfE funding – Basic Need
- DfE funding – Other
- Non-DfE grant
- Revenue allocation
- Other (Please specify.....)

Part 5 – Submitting the return

Do not submit until you are satisfied the data is complete and correct. After submitting, you will be unable to amend or submit any other data. Should a subsequent change be required please contact DfE on ConditionSpend.COLLECTION@education.gov.uk.

25. Before you can submit your data, you must complete the 'Supporting questions' and 'Declaration' element of the form (see figure 9):

- Enter all relevant details in the areas provided
- Check the content
- Click the tick box: 'I also confirm that the information given in this form has been approved for submission, by the Director of Children's Services' or 'I also confirm that the information given in this form has been approved for submission, by the Chief Executive (or equivalent)'

The 'Submit' button will now become live.

26. When you have completed your final checks, please click the 'Submit' button at the bottom of form.

27. Once submitted, you will receive an automated email confirming receipt by DfE.

Note: The 'declaration' can be completed by someone other than the Director of Children's Services (DCS) or the Chief Executive, but DfE require RBs to ensure that the contents of the form are approved by the DCS or Chief Executive prior to submitting data.

SCA summary

Total SCA 2016-17 expenditure

£2,129,677

Total SCA funding remaining

£0

Use of surplus funds *

Supporting questions

Section 1 - Strategic management and planning

1.a. Does your LA employ staff in strategic property management that are dedicated to managing the estate? *

Yes

If yes, how many and at what level? *

Senior Management

1

Non-senior management

4 or more

1.b. Does this staffing level meet your needs? *

Yes

If no, how many staff in total would meet your needs, and at what level? *

Senior Management

1

Non-senior management

5

2. Do you have or carry out any of the following? How frequently are they repeated/updated? *

Choose from the drop-down

Short term (1-2 years) Asset/Estate management plan or strategy

Every 3 or more years

Long term (3 years or more) Asset/Estate management plan or strategy

Annually

Declaration



As the above named Local Authority's designated Accounting Officer, I certify that the grant provided for the projects listed above has been spent in accordance with the requirements and conditions of grant set out in the SCA Funding Agreement. I understand that unless agreed previously, any underspend may be reclaimed by EFA.

Name *

Elizabeth Smith

Position

Estates

Organisation *

Hills Council

Email *

e.smith@hills.com

Tel no.

(no spaces)

0711111111



I also confirm that the information given in this form has been approved for submission, by the Director of Children's Services (the individual named under the heading 'Completed by', as given at the top of this document).



Save

Submit

Return to Dashboard



Figure 9: Supporting questions and declaration section of form



Department
for Education

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