



Department
for Education

Condition Spend Data Collection (CSDC)

User guide

**Guidance for multi-academy trusts and
local authorities on how to submit the
Condition Spend Data Collection (CSDC)
return**

October 2018

Of interest to multi-academy trusts and local authorities who received School Condition Allocation funding in Financial Year 2017 to 2018.

Checklist

- ☒ Login to the CSDC online portal.
- ☒ Enter your spend data either using the excel template or by adding directly to the portal. Remember to save periodically.
- ☒ Check all projects using SCA funding have been added and data is correct.
- ☒ Confirm that the data has been approved for submission by the Director of Children's Services or the Chief Executive (or equivalent)
- ☒ Complete supporting questions and declaration.
- ☒ Submit form to DfE.

Summary of changes this year

Please see the main body of the guidance for details.

- **Units:** We are now collecting a unit measure for single element works.

Changes made last year (2016/17 collection)

- **Value of SCA Spent:** This should now include expenditure that was **incurred** between 1 April 2017 and 31 March 2018 **but not yet invoiced** (i.e. costs that will be accrued and shown as expenditure in 2017/18 accounts); in addition to expenditure that has been invoiced for payment between 1 April 2017 and 31 March 2018.
- **Area:** We are now collecting a measure of area for roofing, block replacement and extension projects.
- **Main Use of Funding and Sources of Supplementary Funding:**
New definitions have been added to the guidance and some categories have been expanded to identify different funding sources separately where possible.
- **Centrally run programmes:** We now explicitly say 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); or Building Schools for the Future (BSF). If you are using SCA as contribution to any of these centrally funded programmes, then you should record the SCA contribution only.

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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 2017 to 2018 financial year (FY).

Data can only be submitted using DfE's 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 2017/18 FY.

When is the deadline for submitting data?

Friday 30 November 2018. 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://efadatacollections.education.gov.uk/sites/csdcl/>
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@efadatacollections.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

Sign in

Figure 1

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

Condition Spend Data Collection

CSDC submission of use of funds statement.

Guidance on how to use the online portal is given in the [User Manual / Guidance Notes](#).

Please use links below

[Local Authority Dashboard](#)
CSDC local authority applications dashboard

[Previous Returns](#)
List of previous CSDC applications associated with closed programmes

Figure 2

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

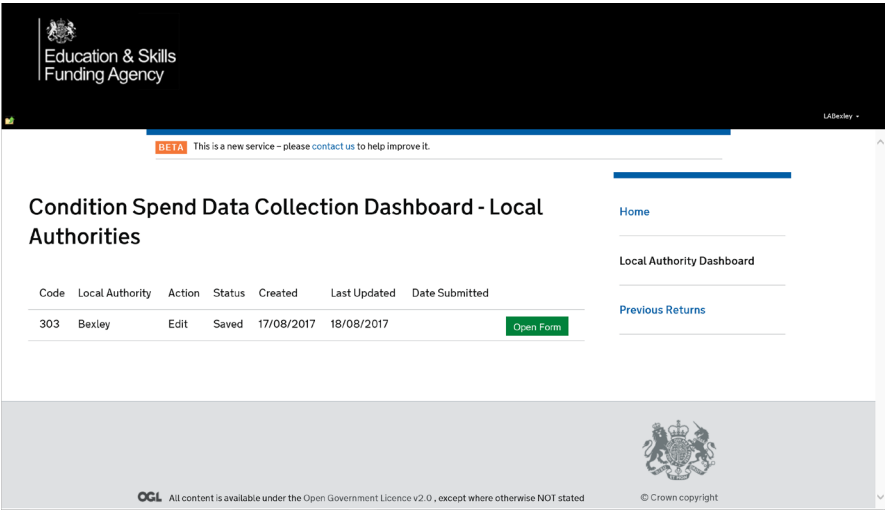


Figure 3

Part 2 – Entering data online

Notes on entering data

- 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.

5. 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) 2017-2018' (*see figure 4*).
6. 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

7. 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.

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

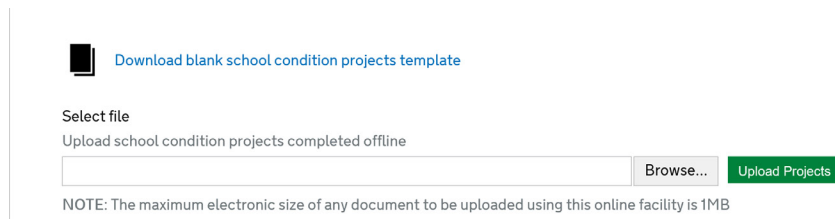


Figure 5

- Open the template and 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).
- 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](#).
- Once complete, save your spreadsheet locally before uploading to the portal.

Note: If you cannot access the dropdown boxes, please right-click the cell and select 'Pick from drop-down list'

[illegible]

File upload

12. On your School Condition Projects dashboard, click 'Browse...' and then open your saved spreadsheet (*see figure 7*).
13. Click 'Upload Projects'.
14. Once uploaded, the system may flag up errors which must be corrected onscreen in order to submit your return.

Figure 7

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.

15. 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.
16. 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](#).
17. 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.
18. 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 option.
- Primary Use of Funding ***: A dropdown menu with "Select" as the current option.
- 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 option.
- Additional Comments**: A large text area with a vertical scrollbar.
- Buttons**: At the bottom left, there are two green buttons: "Add" and "Clear".

Figure 8

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

19. 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

20. 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.
21. 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

22. 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); Condition Improvement Fund (CIF); and Building Schools for the Future (BSF).

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.

General

- **Time period:** All sums entered should refer to the Financial Year (FY) 2017-18; April 2017 to March 2018.
- **SCA Allocation brought forward from 2016/17:** Please enter any SCA funding that has been carried over from the previous financial year, if any. We will assume that any carry-forward from 2016/17 has been spent in 2017/18 if the total value of SCA spent in 2017/18 is greater than the carry-over from 2016/17. If the total value of SCA spent in 2017/18 is less than the carry-over from 2016/17, we will assume this carry-over has not been spent.
- **Duplicate lines:** The portal will not allow duplicate lines to be entered, but if you feel you need to enter a valid duplicate then please contact us for advice on how to do so.
- **Project slippage:** If a project that was planned for 2017/18 slips wholly into 2018/19, please do not enter it but instead provide details as a reason for carry-over. If a project is delayed, please only enter the amount spent in 2017/18 and provide the rest as a reason for carry-over.

Project details

- **School details:** Please enter/choose the school's URN. 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:** Only enter one line per project per school, as far as possible.
- **Multi-purpose projects:** If the project relates to more than one work type or main use (see categories below), please split out costs as far as possible. If this is not possible, please use category that represents the largest proportion of funding.
- **Value of SCA Spent in 2017/18:** This should include expenditure that has been a) invoiced for payment between 1 April 2017 and 31 March 2018 or b) incurred between 1 April 2017 and 31 March 2018 but not yet invoiced (including costs that will be accrued and shown as expenditure in 2017/18 accounts).
- **Value of Supplementary Funding Spent:** Please enter only the amount of supplementary funding spent towards the project in 2017/18. Please also record the MAIN source of the supplementary funding.
- **Area:** For roofing projects only, please enter the area (m²) of the roof that was replaced/repaired/constructed.
- **GIFA:** For block replacement and extension projects only, please enter the Gross Internal Floor Area (m²) of the block/extension.
- **Units:** for single element works only, please enter the number of unit items used (e.g. number of boilers, windows, doors, etc).
- **Additional Comments:** Use this space to give information on extra project details, links to other condition projects, a general explanation why supplementary funding was used (if any), etc.
- **Reason and planned use for remaining funds:** In the free text box, please enter as much information as possible on:
 - why not all SCA was spent in 2017/18;
 - how much of the remaining funds will be spent by when;
 - what the remaining funds will be spent on;
 - if the remaining funds are either contractually committed, offered for reclaim, already recovered by the DfE, or not contractually committed but they would like to request a carry forward.

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

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 below

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 below

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 below

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 below

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 below

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 below

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 show different uses separately as much as possible. Where this is not possible please enter the main use of the funding.

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.

Block extension: expansion of an existing establishment through a new build.

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);
- Building Schools for the Future (BSF).

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.

23. 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.

24. When you have completed your final checks, please click the 'Submit' button at the bottom of form.
25. 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) but DfE require RBs to ensure that the contents of the form are approved by the DCS 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



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Figure 9

Expiry or review date

This guidance will be reviewed before September 2019.



Department
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