



Education  
Funding  
Agency

# User guide - Condition Spend Data Collection (CSDC)

September 2016

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## Introduction

This publication provides guidance from the Department for Education. It has been produced to help local authorities (LAs) submit capital spend data to the Education Funding Agency (EFA).

EFA is conducting the annual collection of spend data. This aims to secure details of each LA's use of the SCA (School Condition Allocation) fund, during the preceding financial year (FY).

Data can only be submitted using EFA's online portal. Guidance on how to access and use the online portal is given below. Particular attention should be paid to the section 'Entering data online - notes on use'.

Only one user from each LA may log onto the portal at any time. For this reason EFA recommends an LA works offline to compile the Excel template of spend data (downloadable from the portal) and having checked this, upload the file in a single operation (see para 8 below).

Using the portal, LAs are required to submit data for the 2015 to 2016 FY by 21 October 2016. Any errors in the data must be corrected in the portal before the finalised data is submitted. All data must be submitted using the online portal. Copies of the data will not be accepted through email.

The portal automatically displays details of the SCA fund allocated by EFA for the 2015 to 2016 financial year.

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 Annex B: category descriptors.

Note:

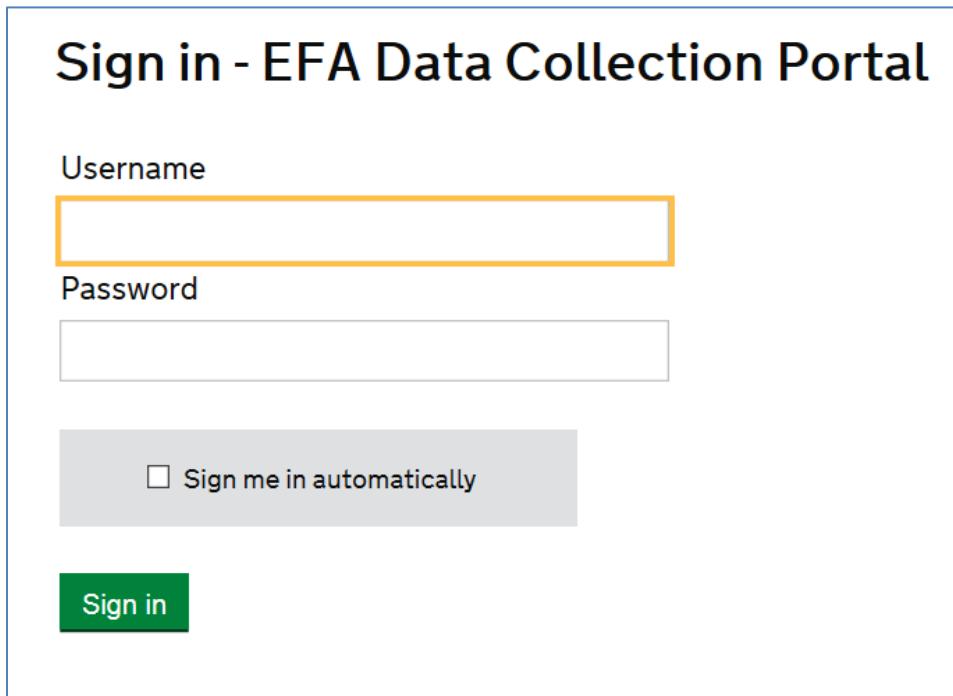
Figures in this guidance include images taken while using the portal, which may show names of LAs or SCA allocations not applicable to you.

## Accessing the data collection online portal

1. Through your web browser, open the website address:  
<https://efadatacollections.education.gov.uk/sites/cfdc/>
2. Enter your username and password and sign in. Your username and password will be provided beforehand by EFA, sent via email.

### Note:

You should receive a username and password on the day this data collection commences. If this is absent, please contact [ConditionSpend.COLLECTION@education.gsi.gov.uk](mailto:ConditionSpend.COLLECTION@education.gsi.gov.uk).



The image shows a login form titled "Sign in - EFA Data Collection Portal". It contains fields for "Username" and "Password", both of which are highlighted with a yellow border. Below these is a checkbox labeled "Sign me in automatically". At the bottom is a green "Sign in" button.

Sign in - EFA Data Collection Portal

Username

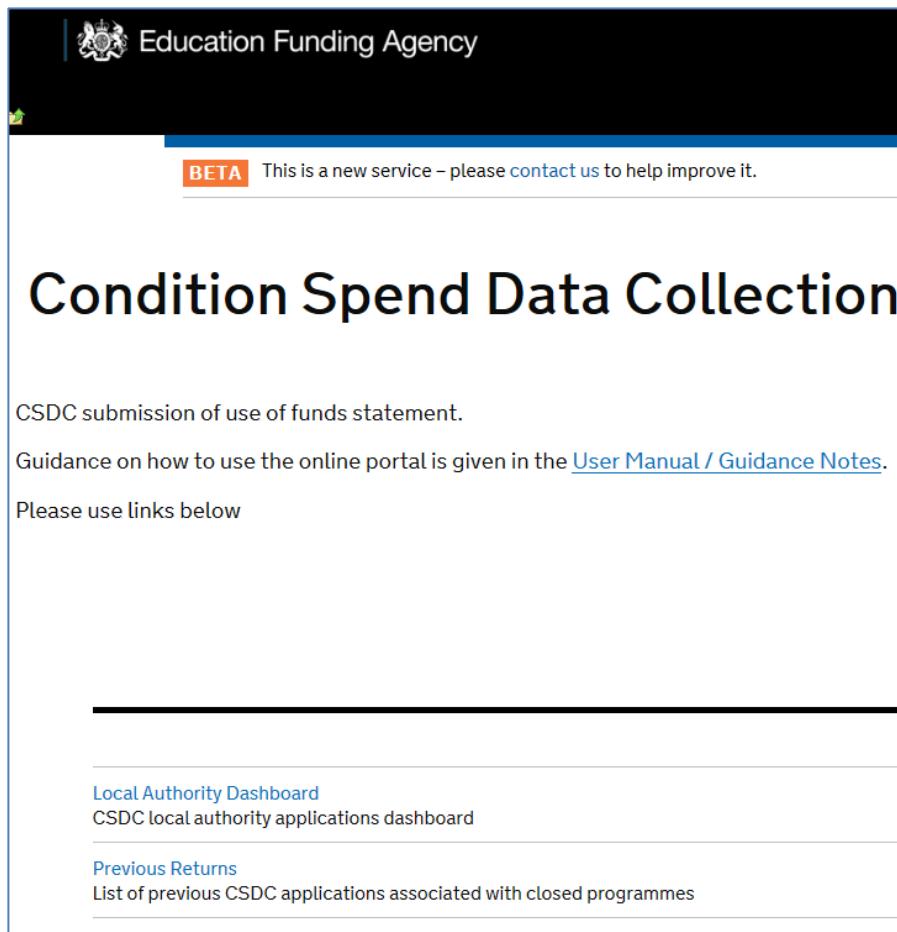
Password

Sign me in automatically

Sign in

Figure 1

3. Click on your ‘Local Authority dashboard’ link at the bottom of the welcome page. (*figure 2*).



**Figure 2**

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

The screenshot shows a web-based dashboard for the Education Funding Agency. At the top, there's a logo and the text 'Education Funding Agency'. A 'BETA' label with a note 'This is a new service – please contact us to help improve it.' is visible. The main title is 'Condition Spend Data Collection Dashboard'. Below it, a table displays data for a single entry:

Code	Local Authority	Action	Created	Last Updated	Date Submitted
341	Liverpool	Edit	26/08/2016	31/08/2016	

Next to the table is a green button labeled 'Open Form'. To the right, a sidebar titled 'Links' includes links to 'Home', 'Local Authority Dashboard', and 'Previous Returns'. At the bottom, there's a watermark for 'OGL All content is available under the Open Government Licence v2.0, except where otherwise NOT stated' and the '© Crown copyright' logo.

**Figure 3**

# Entering data online

Notes on use:

- The data required by EFA includes both mandatory elements, indicated by a red star (\*). The form also invites you to supply further information to explain if each SCA funded project was supplemented by other sources of funding.
  - The data collection form includes automated quality checks. If you have entered or saved data and a ‘query’ message appears on-screen please correct, add or delete the element of information of concern as quoted in the message, and again use the save function. This will enable EFA’s portal to record this change and accept your submit operation.
  - Each line of data provided by LAs is required to describe a single project as delivered during the financial year (FY).
  - A section at the bottom of the form ‘SCA summary’ section may not automatically show a correct total of expenditure until you have used the save button, directing the form to sum the values of all cost data provided.
  - The box for completion labelled ‘additional comments/ use of surplus funds’ must contain a general explanation of circumstances causing the total spend on projects to be other than the value of SCA, if that was the case.
  - When all data has been entered by an LA, the completing officer will need to use a tick box at the base of the form. This confirms that ‘the information given has been approved for submission by the Director of Children’s Services (DCS). Before this, the content of the form may be updated by the supplying LA. After use of this tick box, the ‘submit’ button will become live and may be used to formally submit the return.
  - After using the submit function the supplying LA will be unable to amend or submit any other data. Should a subsequent change be required please contact EFA on [ConditionSpend.COLLECTION@education.gsi.gov.uk](mailto:ConditionSpend.COLLECTION@education.gsi.gov.uk).
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) 2015 to 2016’ (*figure 4*).

6. Check that the automated entry of your LA's name and the value of the SCA are correct. In the event of any error please contact EFA at [ConditionSpend.COLLECTION@education.gsi.gov.uk](mailto:ConditionSpend.COLLECTION@education.gsi.gov.uk).

The screenshot shows a web-based application for the Education Funding Agency. At the top, there is a logo and the text "Education Funding Agency". Below this, a banner indicates it is a "BETA" service and encourages users to "contact us to help improve it". The main title of the page is "End of Year Use of Condition Funds Summary - financial year (FY) 2015-16". Under this, there is a section titled "Local Authority summary" which displays "Local Authority: Liverpool" and "School Condition Allocation (SCA) 2015-16: £2,978,077". At the bottom of this section, it says "Completed by".

This screenshot shows the "School condition projects" section of the portal. It includes a "Date" field containing "31/08/2016". Below this is a "School condition projects" section with a "Download blank school condition projects template" button, a "Select file" input field, and a "Upload school condition projects completed offline" button.

**Figure 4**

7. There are two options by which data can be added to the form shown on screen:

**Option 1**

8. The upper section of the form includes a 'download blank school condition projects template' option. This will give you a blank excel compatible template you can complete offline. Note that you will need to re-enter your portal log-in details to open the spreadsheet.
9. To complete the downloaded template offline, enter the data in the form for each project, selecting the appropriate fields from the drop-down menus. The completed template should include all projects delivered all or in part through use of the SCA fund.
10. Once complete the template can be uploaded into the portal using the 'upload projects' area (figure 5), its content being displayed in the lower part of this form (figure 6).

The screenshot shows a web page with a dark header containing the Education Funding Agency logo and name. Below the header, there's a section titled 'School condition projects'. It includes a link to 'Download blank school condition projects template', a file upload area with a 'Browse...' button and a green 'Upload Projects' button, and a message stating 'No school condition projects available'. At the bottom, there's a note about a query regarding SCA utilization and a 'Delete' button. A red box highlights the note at the bottom.

Download blank school condition projects template

Select file

Upload school condition projects completed offline

Browse... Upload Projects

No school condition projects available

Delete

QUERY: The sum of the value of SCA utilised is not equal to the school condition allocation. Use the additional comments field to provide reasons why this is the case.

**Figure 5**

## Option 2

11. As an alternative to Option 1, data for each project may be entered into the vacant boxes shown on the lower part of this screen (figure 6).
12. Only the details of one project can be inserted at a time.
13. Once all information has been entered for a project, click the ‘add new school condition project’ button. Note: once this button has been used, the data for that project cannot be edited on screen. A line of data for the project can be deleted and an amended record entered.

The screenshot shows a form for adding a new school condition project. It has fields for URN\*, School name\*, Work Type\*, and Main Use of Funding\*. There are dropdown menus for Work Type and Main Use of Funding. At the bottom, there are buttons for 'Add New School Condition Project' and 'Clear'.

URN\* School name\* Work Type\* Main Use of Funding\*

Select Select

Add New School Condition Project Clear

**Figure 6**

14. Repeat the above steps to enter data for all of the projects you are submitting as part of the return.

## Editing data

15. The online portal will not allow CSDC returns that contain errors to be submitted. Any errors should be corrected before submitting your CSDC return. It is possible to save the record with errors for correction at a later date, but these must be corrected before ‘submission’.

16. 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 EFA. Once a return has been submitted, EFA will review the content and will contact the LA if further explanation is required.

## Deleting spend data

17. There may be the need to amend a project’s data. In this case, on the lower part of the main page (figure 6), locate the project record to be changed, delete this and then re-enter the details to give a corrected record.

## Submitting the return

18. Once the correct project data has been entered, the ‘declaration’ element of the form must be completed (*figure 7*):

- 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’

The ‘submit’ button will now become live.

19. When the above actions have been completed together with any further checks you wish to make, click the “submit” button at the bottom of form.
20. Once submitted, you will receive an automated email confirming receipt at EFA.

Note: the ‘declaration’ can be completed by someone other than the Director of Children’s Services (DCS) but EFA require LAs to ensure that the contents of the form are approved by the DCS prior to submitting data.

Add New School Condition Project    [Clear](#)

**SCA summary**

Total SCA 2015-16 expenditure  
£70,645

Total SCA funding remaining  
£2,907,432

**Supporting questions**

1. Do you have an understanding of the condition need across all of your estate and how it is changing over time? \*

Yes

If yes, How do you develop this knowledge? \*

Adhoc surveys

2. If you were to receive additional capital funding, what would you invest it in? \*

Condition

3. How do you allocate funding? \*

Per pupil basis

4. How do you deliver projects? \*

School led and monitored centrally

Additional Comments/Use of surplus funds  
A fire at Hills School prevented us from delivering the planned major capital project there and we were unable to assign the unused funds to complete other capital projects during the FY.

**!** 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 *	A Smith
Position	Estates
Organisation *	Hills Council
Email *	Hills@aaaaa
Tel no.	01252878534

**!** 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](#)

**Figure 7**

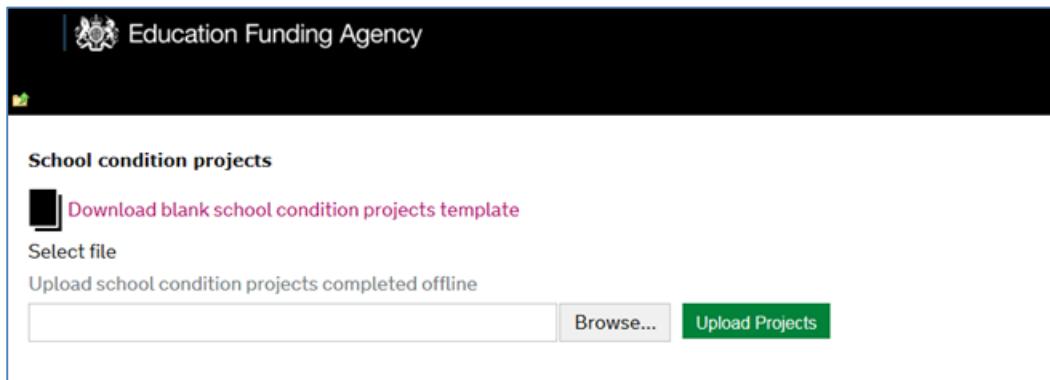
## ANNEX A

### Using the excel template to upload a set of data

We recommend submitting your data through the excel compatible spreadsheet. This allows you to assemble data and check this without complication prior to submitting a return to EFA.

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

1. Click the link ‘download blank school condition projects template’. (It is possible at this stage EFA portal will again ask you to enter your user name and password details again).



**Figure 8**

2. Open the template in your spreadsheet programme 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. Provide a separate line for each individual project. Make sure to save your work periodically.

**Figure 9**

3. Once complete, save your spreadsheet.

## File upload

Once complete, the capital spend template will need to be uploaded to the CSDC portal.

1. Click 'browse' and open your saved spreadsheet.
  2. Click the 'upload projects' button on your School Condition Projects dashboard.
  3. Once uploaded, the system may flag up errors which must be corrected onscreen in order to submit your return.

## ANNEX B

### Category descriptors

#### General Note

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**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

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**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

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**Condition:** investment in the physical state of the major elements of premises such as roofs, external walls, electrical services, external areas etc.

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**Sufficiency (including expansion or rationalisation):** investment in total areas and the quantity and organisation of places within schools, in relation to demand

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**Suitability:** investment to improve how well the premises meet the needs of pupils, teachers and other users

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**Efficiency:** investment in physical aspects of premises which directly result in a reduction in revenue costs such as energy, transport etc.

	Work type	Primary use of funding
1	Block replacement	Provision of new block (non-temporary building)
2	Multiple block condition works - single element (roofs or mechanical services etc.)	Provision of new block (temporary building)
3	Multiple block condition works - multiple elements (roofs and mechanical services etc.)	Block extension
4	Single block condition works - single element (roofs or mechanical services etc.)	Fixed furniture and fittings – science
5	Single block condition works - multiple	Fixed furniture and fittings – catering

	elements (roofs and mechanical services etc.)	kitchen (not curriculum facilities)
<b>6</b>	External (non-building) condition works	Fixed furniture and fittings – general FF&F in teaching spaces
<b>7</b>	Emergency works	Fixed furniture and fittings – general FF&F in non-teaching spaces
<b>8</b>	Compliance and health and safety	Roofing
<b>9</b>	Energy Efficiency	Floors and stairs
<b>10</b>	Accessibility improvements	Floors, ceilings and redecorations
<b>11</b>	Expansion - basic need	Electrical services
<b>12</b>	Expansion - not basic need	Mechanical services (including boilers and heating systems)
<b>13</b>	Expansion - temporary buildings	Electrical and mechanical services (including boilers and heating systems)
<b>14</b>	Suitability - teaching areas	Electrical services, mechanical services (including boilers and heating systems), ceilings and redecorations
<b>15</b>	Suitability - non teaching areas	Lifts
<b>16</b>	Suitability - external areas	External walls windows and doors
<b>17</b>	Revenue activities	External walls windows and doors and redecorations
<b>18</b>		Internal walls windows and doors
<b>19</b>		Internal walls windows and doors and redecorations
<b>20</b>		Internal walls windows and doors, ceilings and redecorations
<b>21</b>		Internal walls, windows and doors, ceilings, floors and redecorations
<b>22</b>		Internal walls, windows and doors, ceilings, floors, redecorations and

	electrical/mechanical services (including boilers and heating systems)
<b>23</b>	Redecorations (internal and/or external)
<b>24</b>	Toilets
<b>25</b>	Ceilings
<b>26</b>	Playing fields
<b>27</b>	External areas (excluding playing fields but including drainage and swimming pools)
<b>28</b>	Structural strengthening works
<b>29</b>	Asbestos management/removal
<b>30</b>	Fire safety works
<b>31</b>	Revenue activities



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