

Scotland's Public Sector Heat Decarbonisation Fund – change request form

The purpose of this form is to enable you to formally seek approval for any significant changes that you need or want to make to deliver your Scotland's Public Sector Heat Decarbonisation Fund project.

As projects are delivered, there are occasions when changes to the scope of the project awarded grant funding become necessary to complete the project. We expect you to inform us when you become aware of such changes to your project and submit this form for review before implementing the change. This is so that we can provide assurance that the new scope meets the scheme criteria and you are not proceeding at risk or delivering works that do not meet scheme criteria and may therefore render you ineligible for funding.

Please note:

- The deadline to submit a change request for your project will typically be the September prior to the grant end date stated on your Grant Offer Letter. For example, the grant end date being 31 March 2025, the deadline will be September 2024, with an exact date to be confirmed.
- Until a change request has been approved, we are unable to approve further payments for measures affected by the proposed changes. This is to ensure that any costs are for eligible expenditures within the scheme criteria.
- We will not accept a change request that is submitted retrospectively for works that have already started on site. To do so will put your eligibility to claim your grant funding at risk.

To support you in completing the form, please see below guidance that outlines the key principles involved in a change request for your project. You are required to complete *part 1* of the form below, outlining the reason for the request, the options considered and a revised delivery plan.

Upon receiving your completed change request form, we will assess the details of the changes you have outlined to the original application which was awarded the grant funding. All other elements of the project will be assumed to remain deliverable as approved at the time of the grant award. Our assessors may be in touch with queries or requests for additional supporting information to enable us to make a decision.

The outcome of your change request will be communicated and, if approved, you will be issued a Grant Amendment Letter to reflect the change and highlight any additional conditions. All other terms and conditions of your grant award will continue to apply.

Change request key guidance principles

A 'change' is defined as: any significant alteration in the scope of the project, including adding or removing measure and/or sites and the removal or addition of measures that were not in the previously agreed scope of works.

If there is a change to the scope of existing energy efficiency measures saving direct carbon, a formal change request will only be needed if the gas system is not to be replaced by the proposed zero direct emissions heating system.

Each change request will be considered on its merits and the change of scope or revised completion date will be determined in consultation with you as the grant recipient. We will work with you to support you in achieving the desired outcomes from your Scotland's Public Sector Heat Decarbonisation Fund project.

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Once you have filled out the change request form, please send it to your relationship manager. We will aim to make a decision on your change request within **20 working days** and the outcome will be communicated to you by your relationship manager.

Supporting documentation should be provided for all change requests.

Below is some guidance on the minimum information we would need to consider your request:

Scope change	<ul style="list-style-type: none"> Updated application form, ensuring all steps reflect the updated project scope Updated energy-saving calculations Finalised, detailed project programme Updated risk register Updated cost breakdown with quotes, if available Any other supporting information as relevant
Carbon cost ratio change	As above
Project type change	“ ”
Grant end date change	“ ”
Site change	<p>In addition to the documents above:</p> <ul style="list-style-type: none"> Options appraisal Feasibility study (including heat loss calculations) Baseline data for gas and electricity consumption Data sheets for proposed technologies Any other supporting information as relevant

The following change requests are **not permitted** as part of Scotland's Public Sector Heat Decarbonisation Fund:

- Increase to grant value in excess of £2.5m
- Increase in scope
- Addition of zero direct emissions heating to a 'fabric first only' project
- Extension to the grant end date

Change request form

Part I : This section should be completed by the grant recipient

Please note **all sections are mandatory** for your change request to be assessed and we will assess only the changes outlined in this form. If a section is left blank, we cannot guarantee that your change request will be considered for technical assessment.

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Organisation name	
Request made by	
Date of request	
Project title	
Project reference	

a) Description of the proposed change

Change request type <i>Please tick as appropriate</i>	<input type="checkbox"/> Site change <input type="checkbox"/> Site(s) removed <input type="checkbox"/> Site(s) added <input type="checkbox"/> Scope change <input type="checkbox"/> Measure(s) removed <input type="checkbox"/> Measure(s) reduced in scope <input type="checkbox"/> Carbon cost ratio (CCR) <input type="checkbox"/> Decrease in CCR <input type="checkbox"/> Increase in CCR <input type="checkbox"/> Project type <input type="checkbox"/> Increase in size/ number of zero direct emissions heating measures <input type="checkbox"/> Removal of zero direct emissions heating <input type="checkbox"/> Grant end date <input type="checkbox"/> Extension to practical completion date
Site change <i>Please outline:</i> 1. What site(s) have been removed? What site(s) have been added?	
Scope change <i>Please outline:</i> 1. What measure(s) have been removed? What measure(s) have been reduced in scope?	

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<p>Carbon cost ratio (CCR)</p> <p><i>Please outline:</i></p> <ol style="list-style-type: none"> 1. Has the CCR decreased or increased? 2. What is the new CCR value? 	
<p>Project type</p> <p><i>Please outline:</i></p> <ol style="list-style-type: none"> 1. What size/ number has the zero direct emissions heating measure increased by? 2. What zero direct emissions heating measure(s) has been removed? 	
<p>Grant end date</p> <p><i>Please outline:</i></p> <ol style="list-style-type: none"> 1. What is the new expected practical completion date? 	
<p>Evidence provided</p> <p><i>Each element listed must be provided for us to assess your change request. If any of these pieces of evidence are not provided, we will not be able to complete the assessment.</i></p> <p><i>Please confirm that you have provided the requested information by ticking the appropriate box.</i></p>	<p><input type="checkbox"/> Updated application form, ensuring all steps reflect the updated project scope:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Step 1 Introduction: Section 1.2 <input type="checkbox"/> Step 3 Building Details <input type="checkbox"/> Step 4 Support Tool <input type="checkbox"/> Step 5 Project Governance <p>If Fabric First and Zero Direct Emissions Heating:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Step 6.2 Heating System <p><input type="checkbox"/> Updated energy saving calculations (Excel format)</p> <p><input type="checkbox"/> Finalised, detailed project programme</p> <p><input type="checkbox"/> Updated risk register</p> <p><input type="checkbox"/> Updated cost breakdown with quotes, if available</p>
<p>Reason for change request</p> <p><i>Please outline:</i></p> <ol style="list-style-type: none"> 1. Why this is needed – give a short description of the reason for the request. 	

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<p>2. <i>The steps taken to try to meet the original proposal and the options considered.</i></p> <p>3. <i>The key changes being proposed - including any revisions to the delivery programme, specification, costs and grant payment schedule.</i></p>	
<p>Risk mitigation</p> <p>1. <i>In the case that your change request is approved, we will need to understand how any risks will be managed to ensure the successful delivery of your revised project.</i></p> <p>2. <i>Please state the key risks and outline the mitigation actions regarding the delivery of the revised project.</i></p>	
<p>The outcome should the change request not be approved</p> <p><i>Please state the risk to your organisation / project should this change request not be approved.</i></p> <p><i>How will this affect the project and your organisation's future?</i></p>	

b) Revised payment schedule

Please specify here your revised grant value, the total of any Scotland's Public Sector Heat Decarbonisation Fund payments received to date for your project and the proposed Scotland's Public Sector Heat Decarbonisation Fund payment schedule based on your change request and revised delivery timetable.

Revised grant value	
Payment received to date	

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Payment period	Final day to submit a payment request	Month of payment	Payment request value
Period 5	Thu, 25 Jul 24	Aug 2024	
Period 6	Thu, 29 Aug 24	Sep 2024	
Period 7	Thu, 26 Sep 24	Oct 2024	
Period 8	Thu, 24 Oct 24	Nov 2024	
Period 9	Thu, 28 Nov 24	Dec 2024	
Period 10	Thu, 19 Dec 24	Jan 2024	
Period 11	Thu, 30 Jan 24	Mar 2024	
Period 12	Thu, 27 Feb 24	Mar 2024	
FY 25/26 Period 1 (Accruals)	TBC	TBC	
FY 25/26 Period 2 (Accruals)	TBC	TBC	
		Total	

c) Appendix

Please append any supporting documentation referred to in the above sections when submitting your change request form.

d) Declarations

1. I have detailed within this change request all proposed adjustments to the above-specified project explicitly and included all relevant supporting materials.
2. I understand that any alterations which have been included but which are not outlined clearly in "Part I.a.)" of this form will not be reviewed by Salix for assessment against the technical compliance of the scheme. All other elements of the project will be assumed to remain deliverable as approved at the time of the grant award.
3. I understand that if any alterations to the original application form have not been clearly outlined in this change request form to Salix, and Salix finds these discrepancies upon due diligence at a later date, Salix will not accept any responsibility if the findings impact the final grant value.

☐ I accept all the above declarations

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Accountable officer's signature

Print name

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Part II : This section should be completed by Salix

a) Reason for change request (please check appropriate boxes and include summary)

<input type="checkbox"/> Site change <input type="checkbox"/> Site(s) removed <input type="checkbox"/> Site(s) added	
<input type="checkbox"/> Change of scope <input type="checkbox"/> Measure(s) removed <input type="checkbox"/> Measure(s) reduced in scope	
<input type="checkbox"/> Carbon cost ratio (CCR) <input type="checkbox"/> Decrease in CCR <input type="checkbox"/> Increase in CCR	
<input type="checkbox"/> Project type <input type="checkbox"/> Increase in size/ number of zero direct emissions heating measures <input type="checkbox"/> Removal of zero direct emissions heating	
<input type="checkbox"/> Grant end date <input type="checkbox"/> Extension to practical completion date	

b) Implications to the payment schedule

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c) Assessment required from Salix technical team (please check the appropriate box and include any additional conditions following technical assessment)

Yes <input type="checkbox"/>	No <input type="checkbox"/>
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New technical conditions:

d) Any other conditions to include with the change request

e) Recommendation and reasoning

f) Authorisation

Salix finance authorisation	
Change request decision	Approved / Rejected / Pre-tender letter (Delete as appropriate)
Reason for decision	
Programme manager name	
Signature	