




# PSDS Phase 3 Change requests

July 2024

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# Change request process

# Definition of a change request

A **'change'** is defined as any significant alteration in the scope of the project. This includes **adding or removing a site** to the scope of PSDS works, **any change to the low carbon heating system**, or including **additional energy efficiency measures** which were not previously in the agreed scope.

# What constitutes a change request?

Type of change		Change request?
Adding or removing a site		✓
Changing the low carbon heating system technology		✓
Changing the size of the low carbon heating system		✓
Adding <b>new</b> building fabric improvements or energy efficiency measures		✓
Removing building fabric improvements or energy efficiency measures	Measures that save <b>direct</b> carbon (i.e. fossil fuels) e.g. insulation, BMS	✓
	Measures that save <b>indirect</b> carbon* (i.e. electricity) e.g. PV, LEDs	✗
Increasing or reducing the scope of <b>existing</b> building fabric improvements and energy efficiency measures	Measures that save <b>direct</b> carbon (i.e. fossil fuels) e.g. insulation, BMS	✓
	Measures that save <b>indirect</b> carbon* (i.e. electricity) e.g. PV, LEDs	✗

\*An updated assessment form should still be submitted for some changes despite not requiring a change request assessment

# The process



## Identify

Discuss any changes with your Salix relationship manager

- What is changing?
- What PSDS measures and sites will this impact?

Forecast an expected submission date for your change request

- When will your supporting evidence be available?
- Update your monthly monitoring report



## Submit

Change request form

- What is changing? Use your latest approved project scope
- Remember to sign off the declaration

Supporting evidence

- Please submit all supporting evidence required
- We will support you to collect this information before your project can be assessed



## Assessment

Assessor queries

- You can expect to be contacted by one of our assessors
- Swift responses to queries will enable us to support the timely approval of the changes



## Approval

Notification from your relationship manager

- Your Salix relationship manager will inform you when the assessment is completed

Grant Amendment Letter

- You will be issued a Grant Amendment Letter that your authorising official will need to countersign to complete the process

# Supporting information required

# Required supporting evidence: scope changes

Supporting evidence	Changes to the low carbon system		Changing EE measures saving <b>direct</b> carbon (e.g. insulation, BMS)		Changing to EE measures saving <b>indirect</b> carbon (e.g. PV, LEDs)	
	Changing <b>type</b> (e.g. A2W → A2A, GSHP → ASHP)	Changing <b>size</b> or <b>make/model</b>	Adding measures	Removing / changing scope of measures	Adding measures	Removing / changing scope of measures
Change request form	✓	✓	✓	✓	✓	N/A
Updated app form/project form	✓	✓	✓	✓	✓	✓
Energy saving calculations	✓	✓	✓	✓	✓	
Updated project programme	✓	✓	✓	✓	✓	
Updated risk register	✓	✓	✓	✓	✓	
Updated cost evidence	✓	✓	✓	✓	✓	
Updated PHL calculations			✓	✓		
Data sheets	✓	✓			✓	
Updated schematics	✓					
Feasibility study (incl. options appraisal)	✓		✓		✓	



# Required supporting evidence: site changes

Supporting evidence	Site addition (including swapping one site for another)	Site removal
All evidence required for a <b>scope change</b> (see previous slide)	✓	✓
End-of-life boiler evidence	✓	
Feasibility study	✓	
Options appraisal	✓	
Energy consumption evidence (meter data, historic bills, DEC)	✓	
Schematics	✓	
Peak heat loss calculations	✓	
Data sheets	✓	

# Change request form

- Provides overview of the change request
- Please fill it out with as much detail as possible
  - Better understanding of your changes reduces queries and assessment turnaround times

## a) Description of the proposed change

<b>Change Request type</b> Please tick as appropriate	<input type="checkbox"/> <b>Site change</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Site removed</li> <li><input type="checkbox"/> Site added</li> </ul> <input type="checkbox"/> <b>Scope Change</b> <ul style="list-style-type: none"> <li><input type="checkbox"/> Measure(s) removed</li> <li><input type="checkbox"/> Measure(s) added</li> <li><input type="checkbox"/> Measure(s) reduced in scope</li> <li><input type="checkbox"/> Measure(s) increased in scope</li> </ul>
<b>Site Change</b> Please outline:	
<b>Scope Change</b> Please outline:	

<b>Evidence provided</b> Each element listed must be provided for us to assess your change request, if any of these pieces of evidence are not provided, we cannot assess the change request.  Please confirm that you have provided the requested information by ticking the appropriate box.	<input type="checkbox"/> Updated Application Form, ensuring all steps reflect the updated project scope: <ul style="list-style-type: none"> <li><input type="checkbox"/> Step 1 Introduction: Section 1.2</li> <li><input type="checkbox"/> Step 3.1 Building Details</li> <li><input type="checkbox"/> Step 3.2 Heating System</li> <li><input type="checkbox"/> Step 4 Support Tool</li> <li><input type="checkbox"/> Step 5 Project Governance</li> </ul> <input type="checkbox"/> Updated energy-saving calculations <input type="checkbox"/> Finalised, detailed project programme <input type="checkbox"/> Updated risk register <input type="checkbox"/> Updated itemised cost breakdown with quotes
<b>Reason for change request</b> Please outline:	
<b>Risk mitigation</b>	
<b>The outcome should the change request not be approved</b>	

# Project form



\*not yet live\*

- For **Phase 3c only**, all changes to sites and measures need to be recorded on the project form
  - This replaces the amended application form previously submitted
- Type of change and reasons for each change should be selected from the drop-downs
- The data for each measure will be checked against the latest application/project form submitted to Salix
  - Any changes to figures need to be evidenced via supporting docs

Site Changes	Site Change Reason	Site Name	Site Type	Building Number
No Change		A	Other	Building 1
Remove Building	Cost increases	B	Other	Building 2
New Building	Cost increases Project complexity increased during design stage Additional electricity infrastructure needed DNO timeframes Delivery lead times Securing internal approvals Procurement issues Contractors/Consultants failing to meet their responsibilities Project conflicted with other plans Internal leave Heat pump design complexity Securing planning approvals			Building 3
				Building 4
				Building 5

New Low Carbon Heating System					
Low Carbon Heating System Change	Reason for Change	Low Carbon System Number	Site Name	Building Name	Technology - Work Type
Remove System	Heat pump design complexity	LC System 1	F	Office 1	Air source heat pump (air to water)
Reduced Scope of Measure	Heat pump design complexity	LC System 2	G	Office 2	Air source heat pump (air to water)
No Change		LC System 3	H	Office 3	Air source heat pump (air to water)
No Change		LC System 4			
Remove System		LC System 5			
New System					
Reduced Scope of Measure					
Increased Scope of Measure					

# Key checks – application form (3a,3b) or project form (3c)

- Have all changes been reflected in the updated figures on the form?
- Is the project compliant?
  - Check the 'Step 4 Support Tool' tab to check the project is marked as 'Compliant'
  - The grant value cannot increase from the GOL value awarded
- Does each proposed building include a low carbon heating measure?
- Are low carbon heating systems sized appropriately? Consider the peak heat loss
- Are the boilers to be replaced end-of-life? (site change only)
  - If the boiler is less than 10 years old, extensive evidence will be required to confirm eligibility
- Are measures/savings sequenced correctly?

# Key checks – sequencing

Technology - Work Type	Energy Type	Fuel Cost p/kWh	Annual kWhrs Pre-Project	Annual kWhrs Post-Project	
Roof insulation	Gas	3.90	5,433,441	4,690,375	
BEMS - not remotely managed	Gas	3.90	4,690,375	4,147,031	
BEMS - not remotely managed	Electricity	11.27	1,189,043	1,070,139	
Heating pipework insulation (internal)	Gas	3.90	4,147,031	4,049,413	
Cooling - control system	Electricity	11.27	1,070,139	819,009	
Replace steam calorifier with plate heat exchanger	Gas	3.90	4,049,413	2,999,474	
Replace steam calorifier with plate heat exchanger	Electricity	11.27	819,009	1,189,786	
Current Energy Type	Current Fuel Cost p/kWh	Proposed Fuel	Proposed Fuel Cost p/kWh	Current Fuel Displaced (kWhs)	Proposed Fuel Consumption (kWhs)
Gas	3.90	Electricity	11.27	2,999,474	1,169,795

# Key checks – outstanding conditions

- You are encouraged to submit any information relating to outstanding conditions at the time of your change request submission
- Conditions are expected to be resolved at key milestones as your project progresses
  - Deadlines have been set as standard dates, but if your project passes a milestone at an earlier date please provide the relevant information within 30 days
- Our Energy and Carbon Technical team will request evidence to resolve any conditions due at the time of the change request assessment
  - These will often be related to the 'designs complete' milestone

# Key checks – supporting information 1

- Energy saving calculations
  - ✓ Unlocked Excel spreadsheet clearly showing methodology
  - ✓ Supports and matches figures in application form
- Cost evidence
  - ✓ Itemised cost breakdown
  - ✓ Invoices, quotes to support the difference in costings
- Updated project programme
  - ✓ Shows changes to project timescales (if relevant)
- Updated risk register
  - ✓ Any risks arising from the changes should be referenced
- Specifications (data sheets)
  - ✓ Provided by manufacturer
  - ✓ Evidence the performance of the product

# Key checks – supporting information 2

- End-of-life boiler evidence
  - ✓ Clear picture of the name plate with the date installed included
  - ✓ Boiler service report dating back to the year of installation
- Energy consumption data
  - ✓ Meter data
  - ✓ Bills from the previous year
  - ✓ Up-to-date DEC
- Peak heat loss calculations
  - ✓ Unlocked Excel spreadsheet
- Feasibility study
  - ✓ Consultant or contractor has visited the site and provided a full feasibility report
  - ✓ Outlines how the proposed low-carbon technologies are suitable for the site
- Options appraisal
  - ✓ Report to show all options have been considered and the final outcome is appropriate for the site



# Timelines, further guidance and support available

# Change request timelines

## for claiming grant funds allocated to FY 24-25

- If your project has a **grant end date of March 25** (3a, 3b or 3c project), we expect you to submit a change request to us by **Monday, 30 September 2024**.
- If your project has a **grant end date of March 26** (3c multi-year project), you may submit a change request to us in FY 25-26, however **if a change has been identified in your project**, please inform your relationship manager of the changes as **you may need to get a change request approved to be able to access the grant allocated** to you in your first year of funding.
- Our expected turnaround is of 20 working days after all the supporting information needed for the assessment is submitted to us. This will only apply to change requests submitted to us before 30 September 2024, submissions after this date may take longer to assess.

# Key points to remember

- We expect to receive change requests only when you have confidence in the final design you are proposing, keeping to one change request submission per application where possible.
- Please notify your relationship manager when you become aware that your project may need a change request. We also request you to forecast a date by when you will be able to gather and submit all the supporting information to us.
- When you submit your change request form, please include all the supporting information we need to assess your project, this will support a quicker assessment.
- We will not be able to continue making grant payments for works affected by a change request until we have approved it.
- We cannot 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 PSDS grant funding at risk.

# Delayed completions process

- **We can't offer extensions to your grant end date**

*However,*

- Projects that are delayed after the grant end date can continue delivering their projects with their own funding to complete any works after the grant end date.
- The authorising official must provide a letter confirming this funding is available to complete your project to the agreed scope before we can approve a delayed completion.
- If any changes in energy savings after the grant end date take the project beyond the £325/tCO<sub>2</sub> CCT, you will be required to repay the difference in eligible grant value.
- Delayed completions are reviewed for approval on a case-by-case basis and your relationship manager will support you in this process.



Salix relationship manager



Energy and Carbon Team  
([technical@salixfinance.co.uk](mailto:technical@salixfinance.co.uk))



Online resources

**Support  
available**

# Summary

- Our timelines are designed keeping in mind the scheme criteria:
  - Only costs of works that are completed by 31 March 2025 will be eligible for claims from you FY 24/25 allocation.
  - Any changes to the scope of your project that are not approved by us will not be considered eligible.
- Projects with grant end date March 2025 (3a, 3b and 3c) are expected to submit a complete change request by **Monday, 30 September 2024.**
- Projects with grant end date March 2026 (3c multi-year) are expected to flag any changes early as this may impact the eligibility of your claims for FY 24-25.
- Your relationship manager will support you if you have queries related to any changes to your project.