Phase 3 Public Sector Decarbonisation Scheme

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 Public Sector Decarbonisation Scheme (PSDS) project. As projects are delivered, there are occasions when changes to the scope of the project awarded PSDS 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, so that we can provide assurance that the new scope meets the scheme criteria and you are not proceeding at risk, delivering works that do not meet the scheme criteria.

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, for projects with grant end date 31 March 2025, the deadline is Monday 30 September 2024.
* Until a change request has been approved by us, 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. The exception to this is design-related costs.
* For multi-year projects, any significant changes identified during year one of your project, such as a change of site or low carbon heating system, will require you to submit a change request form for Salix to verify that the new scope meets the scheme criteria before we can approve final payment for the financial year.

To support you in completing the form, below is some useful guidance that outlines the key principles involved in a change request for your project. You are required to complete part I of the form below, outlining the reason for the request, the options considered and a revised delivery plan, as appropriate.

Upon receiving your completed change request form, our team 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 the 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. This includes adding or removing a site to the scope of PSDS works, any change to the low carbon heating system and the addition of energy efficiency measures that were not previously in the agreed scope.

If there is a change to the scope of existing energy efficiency measures saving direct carbon a formal change request will only have to be submitted if the gas is not to be displaced by the proposed low carbon heating system.

Each change request will be considered by our team at Salix on its merits, and the change of scope or revised completion date will be determined in consultation with the grant recipient. We will work with you to support you in achieving the desired outcomes from your PSDS project.

Once you have filled out the change request form, please send it to your Salix relationship manager. We will aim to make a decision on your change request within twenty 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 | * Updated project form (for phase 3c) or application form (for phases 3a and 3b), 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 * Feasibility study, options appraisal * Data sheets, schematics, peak heat loss calculations * Information to satisfy outstanding conditions * Any other supporting information as relevant |
| Site change | In addition to the above:   * Evidence of end-of-life boiler status * Options appraisal * Feasibility study (including heat loss calculations) * Baseline data for gas and electricity consumption * Data sheets for proposed technologies * Schematics (existing and proposed) * Any other supporting information as relevant |

Change Request Form

## 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.

|  |  |
| --- | --- |
| **Organisation name** |  |
| **Request made by** |  |
| **Date of request** |  |
| **Project title** |  |
| **Project ID** |  |

### Description of the proposed change

|  |  |
| --- | --- |
| **Change request type**  Please tick as appropriate | **Site change**  Site(s) removed  Site(s) added  **Scope Change**  Measure(s) removed  Measure(s) added  Measure(s) reduced in scope  Measure(s) increased in scope |
| **Site change**  Please outline:   1. What site(s) have been removed? What site(s) have been added? 2. Have end of life boilers been evidenced for this site? Please reference the name of the document where this evidence can be found. |  |
| **Scope change**  Please outline:   1. What measure(s) have been removed? 2. What new measure(s) have been added? |  |
| **Evidence provided**  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.  Please confirm that you have provided the requested information by ticking the appropriate box. | Completed project form (3c) or updated application form (3a, b), ensuring all steps reflect the updated project scope:  Step 1 Introduction: Section 1.2  Step 3.1 Building Details  Step 3.2 Heating System  Step 4 Support Tool  Step 5 Project Governance  Updated energy saving calculations (Excel format)  Finalised, detailed project programme  Updated risk register  Updated cost breakdown with quotes, if available |
| **Reason for change request**  Please outline:   1. Why this is needed – give a short description of the reason for the request. 2. The steps taken to try to meet the original proposal and the options considered. 3. The key changes being proposed - including any revisions to the delivery programme, specification, costs and grant payment schedule. |  |
| **Risk mitigation**   1. *In the case that your change request is approved, Salix will need to understand how a*ny *risks will be managed to ensure the successful delivery of your revised project.* 2. *Please state the key risks and outline the mitigation actions regarding the delivery of the revised project.* |  |
| **The outcome should the change request not be approved**  Please state the risk to your organisation / project should this change request not be approved.  How will this affect the project and your organisation’s future? |  |

### Revised payment schedule

Please specify here your revised grant value, the total of any PSDS payments received to date for your project and the proposed PSDS payment schedule based on your change request and revised delivery timetable.

|  |  |
| --- | --- |
| **Revised grant value** |  |
| **Payment received to date** |  |

| **Payment period** | **Final day to submit a payment request** | **Month of payment** | **Payment request value** |
| --- | --- | --- | --- |
| Early spend | Thu 18 Apr 24 | May 2024 |  |
| Period 2 | Thu 18 Apr 24 | May 2024 |  |
| Period 3 | Wed 22 May 24 | Jun 2024 |  |
| Period 4 | Fri 22 Jun 24 | Jul 2024 |  |
| Period 5 | Mon 22 Jul 24 | Aug 2024 |  |
| Period 6 | Thu 22 Aug 24 | Sep 2024 |  |
| Period 7 | Mon 23 Sep 24 | Oct 2024 |  |
| Period 8 | Wed 23 Oct 24 | Nov 2024 |  |
| Period 9 | Fri 22 Nov 24 | Dec 2024 |  |
| Period 10 | Mon 06 Jan 25 | Jan 2025 |  |
| Period 11 | Wed 22 Jan 25 | Feb 2025 |  |
| Period 12 | Fri 21 Feb 25 | Mar 2025 |  |
| FY 24/25 Period 1 (Accruals) | TBC | TBC |  |
| FY 24/25 Period 2 (Accruals) | TBC | TBC |  |
|  |  | **Total** |  |

### Appendix

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

### 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  Accountable officer’s signature  Print name |

## This section should be completed by Salix

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

|  |  |
| --- | --- |
| **Site change**  Site(s) removed  Site(s) added  Measure(s) moved to new site |  |
| **Change of scope**  Measure(s) removed  Measure(s) added  Measure(s) reduced in scope  Measure(s) increased in scope |  |

### Implications to the payment schedule

|  |
| --- |
|  |

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

|  |  |
| --- | --- |
| **Yes** | **No** |
| **New technical conditions:** | |

### Any other conditions to include with the change request

|  |
| --- |
|  |

### Salix recommendation and reason for the recommendation

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| --- |
|  |

### Authorisation

|  |  |
| --- | --- |
| **Salix Finance Authorisation** | |
| **Change request decision** | Approved / Rejected / Pre-tender letter  (Delete as appropriate) |
| **Reason for decision** |  |
| **Programme Manager name** |  |
| **Signature** |  |