

Change request webinar

Phase 3c Public Sector Decarbonisation Scheme

July 2025



Presenters

Zac Dennis – Energy & Carbon Analyst

Claudia Head – Client Support Officer



Agenda

Change request process

Supporting information required

- Project form

Timeline

Support available

Questions

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 material change to the low carbon heating system, changes to building fabric measures, or adding 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 new building fabric improvements or energy efficiency measures		✓
Removing building fabric improvements or energy efficiency measures	Measures that save direct carbon (i.e. fossil fuels) e.g. insulation, BMS	✓
	Measures that save indirect carbon* (i.e. electricity) e.g. PV, LEDs	✗
Increasing or reducing the scope of existing building fabric improvements and energy efficiency measures	Measures that save direct carbon (i.e. fossil fuels) e.g. insulation, BMS	✓
	Measures that save indirect carbon* (i.e. electricity) e.g. PV, LEDs	✗

Change request process



Identification

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



Submission

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

Required supporting evidence

Supporting evidence	Changes to the low carbon system		Changing EE measures saving direct carbon (e.g. insulation, BMS)		Changing to EE measures saving indirect carbon (e.g. PV, LEDs)	
	Changing type (e.g. A2W → A2A, GSHP → ASHP)	Changing size or non-like-for-like model change	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

Supporting evidence	Site addition (including swapping one site for another)	Site removal
Change request and project forms	✓	✓
End-of-life boiler evidence	✓	
Feasibility study	✓	
Options appraisal	✓	
Energy consumption evidence (meter data, historic bills, DEC)	✓	
Schematics	✓	
Peak heat loss calculations	✓	
Data sheets	✓	

This is evidence required for site changes. All scope-change evidence remains required for site **additions**.

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	
Change Request type <i>Please tick as appropriate</i>	<input type="checkbox"/> Site change <input type="checkbox"/> Site removed <input type="checkbox"/> Site added <input type="checkbox"/> Scope Change <input type="checkbox"/> Measure(s) removed <input type="checkbox"/> Measure(s) added <input type="checkbox"/> Measure(s) reduced in scope <input type="checkbox"/> Measure(s) increased in scope
Site Change <i>Please outline:</i> 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 this can be found in.	
Scope Change <i>Please outline:</i> 1. What measure(s) have been removed? 2. What new measure(s) have been added?	

Evidence provided <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 cannot assess the change request.</i> <i>Please confirm that you have provided the requested information by ticking the appropriate box.</i>	<input type="checkbox"/> Updated Application Form, ensuring all steps reflect the updated project scope: <input type="checkbox"/> Step 1 Introduction: Section 1.2 <input type="checkbox"/> Step 3.1 Building Details <input type="checkbox"/> Step 3.2 Heating System <input type="checkbox"/> Step 4 Support Tool <input type="checkbox"/> Step 5 Project Governance <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
Reason for change request <i>Please outline:</i> 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 payment schedule.	
Risk mitigation 1. In the case that your change request is approved, Salix will need to understand how risks will be managed to ensure the successful delivery of the 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 <i>Please state the risk to your organisation should this change request not be approved.</i> <i>How will this affect the project and your organisation's future?</i>	

Project form

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

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 – project form

Have all changes been reflected in the updated figures on the form?

Is the project compliant?

- Check the 'Step 4 Support Tool' tab to ensure 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 calorif				

Don't forget to update your sequencing when you remove measures (or you could miss some fossil fuel displacement, which would affect your grant)

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

A vertical decorative strip on the left side of the slide features a collage of construction-related items: a white bucket, a roll of white material, a red tool, and a roll of paper.

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

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 any 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

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

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 system design is appropriate for the site

Timelines & further guidance

Change request timeline

We advise submitting a change request only after you have confidence in a final design

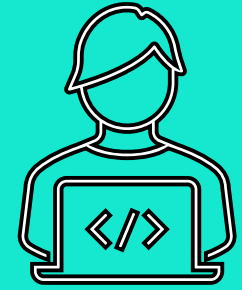
Where possible, one change request per application

Monday 27 October 2025

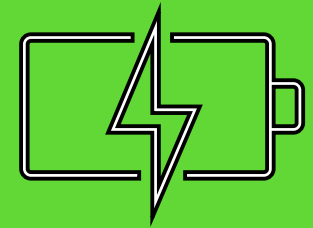
(~1 month after designs complete milestone)

Turnaround of 20 working days after submitting all supporting information

Submissions past 27 October 2025 are not held to the 20 working day turnaround



Salix relationship manager



Energy and Carbon Team
(technical@salixfinance.co.uk)



Online resources

Support available

Delayed completions process

We can't offer extensions to your grant end date

However,

- Projects can continue if you have alternative funding to complete any works after the grant end date
- Your authorising official must provide a letter confirming this funding is available before we can approve a delayed completion
- Projects beyond CCT of £325/tCO₂ will need to fund the difference for any changes in energy savings past the grant end date
- We will approve delayed completions on a case-by-case basis

Key points to remember

- Notify your relationship manager as soon as your project faces changes and forecast your expected submission date for the change request
- At submission, please include all supporting information needed for our assessment
- We cannot make grant payments for equipment or works affected by a change request until it is approved
- We cannot accept retrospective change requests – to do so will put your eligibility to claim PSDS grant funding at risk

Summary

- Our timelines are designed keeping in mind the scheme criteria
 - You can only claim this year's grant fund allocation for costs of works completed by the 31st of March 2026.
 - 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 2026 are expected to submit a complete change request by **Monday, 27 October 2025**
- 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 25-26
- Your relationship manager will support you if you have queries related to any changes to your project

Questions?

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Thanks for listening



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