

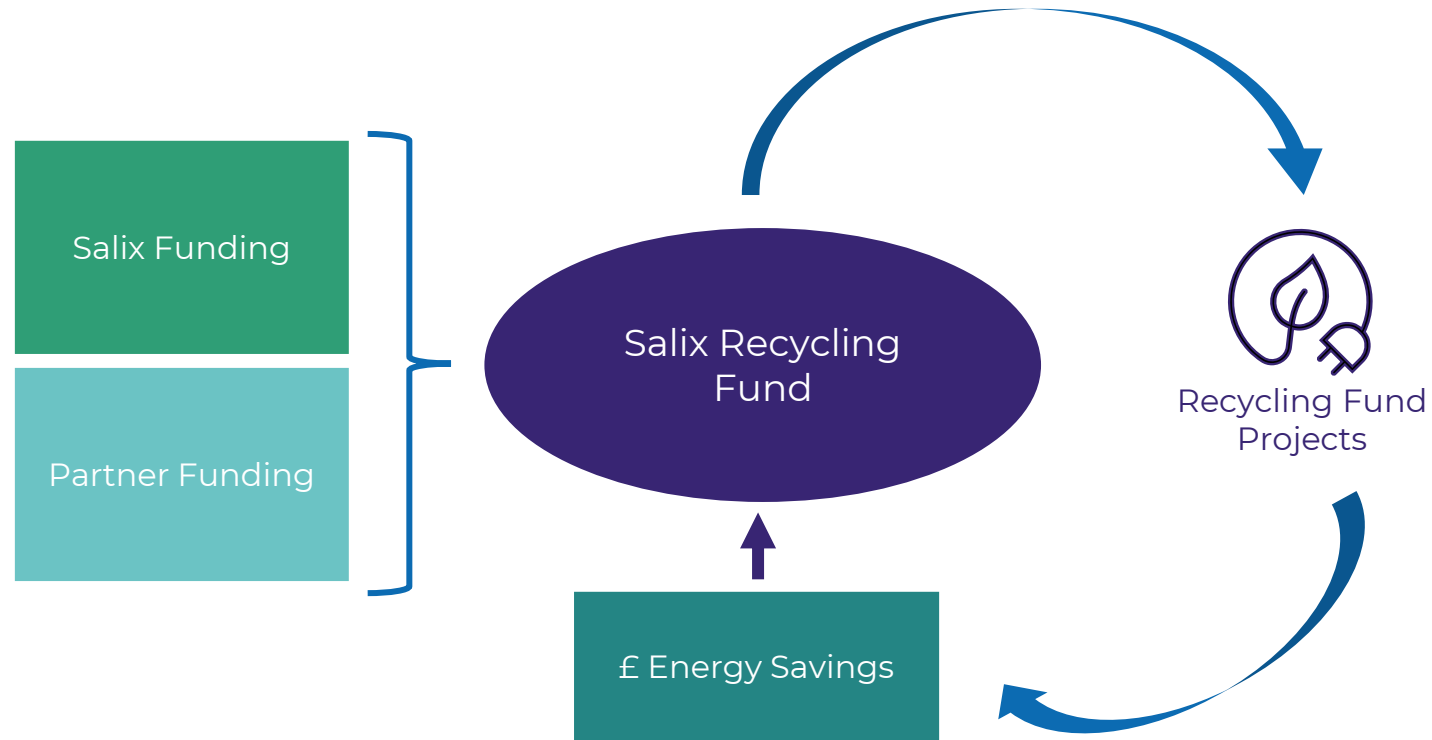
Scotland Recycling Fund Webinar



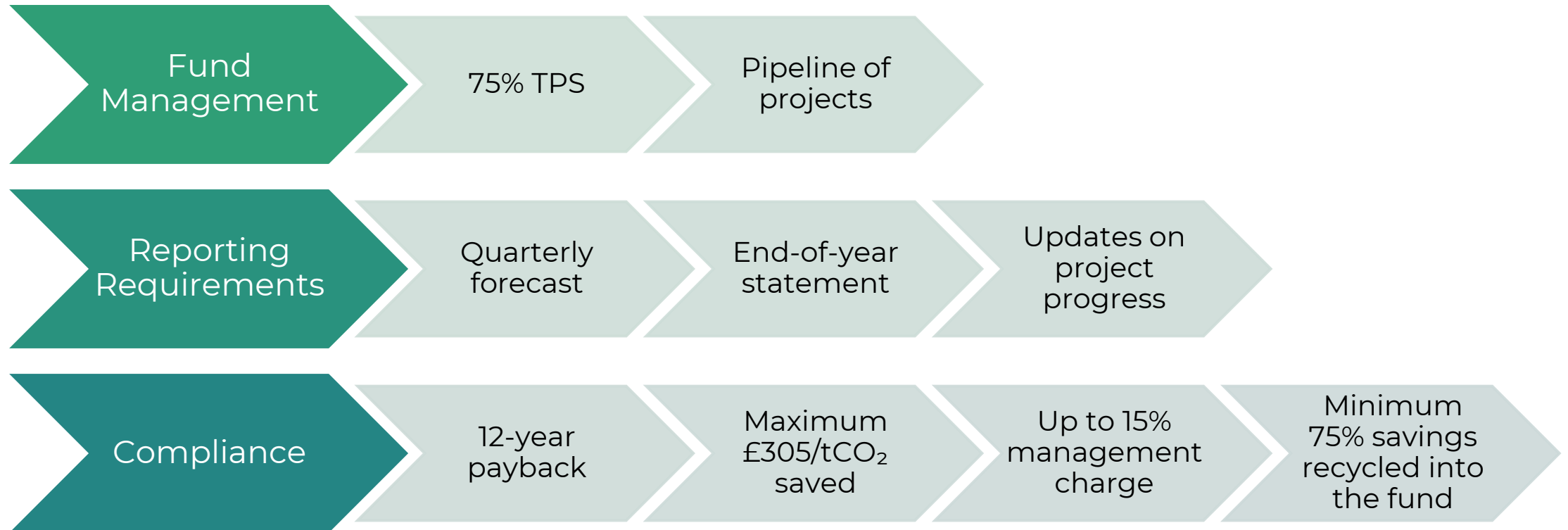
Agenda

1. Key scheme requirements
2. Salix Energy Reporting System walkthrough
3. £100k projects – Compliance tool & business case

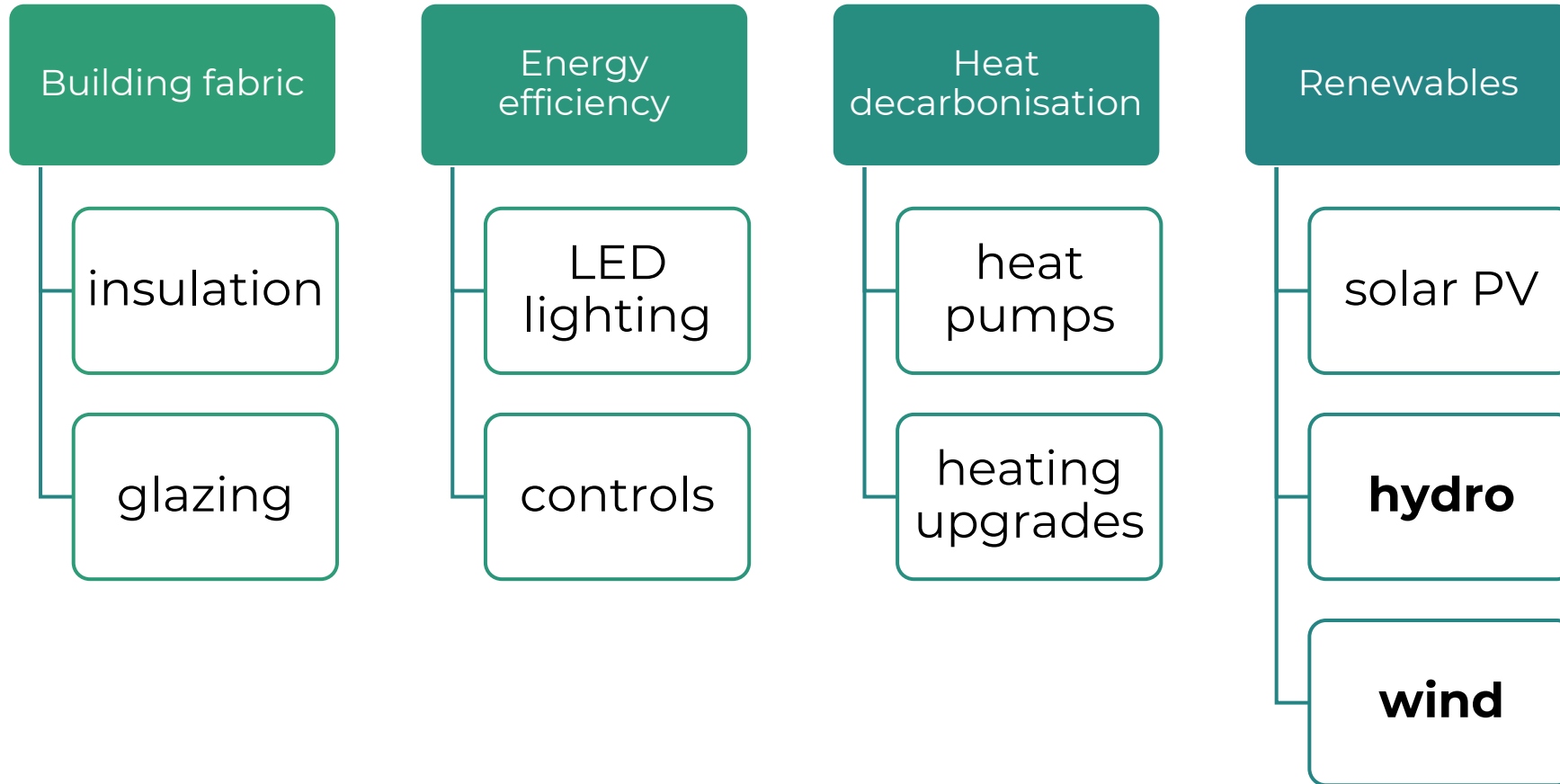
How the Recycling Fund works



Scheme requirements & expectations



Work types



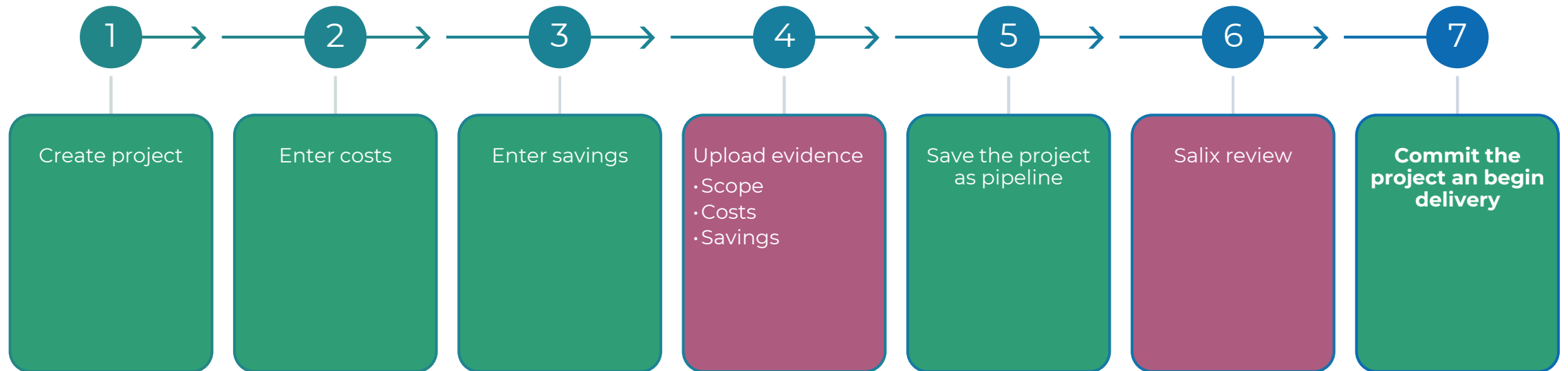
Salix energy reporting system (SERS)



Select Report from list below
A) Project Spend Graph
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[Report Logout](#)

SERS lifecycle > projects over 100k



1

Create project

2

Enter costs

ID		Type *	
Project Title *		Repayments per Year	01
Applicant *	New	Technical Cost £	0.00
Applicant Type		Management Chg. %	0 (0% to 15%)
Proj. Manager	New	Ann. Repay. %	100 (75% to 100%)
Application Date*	(dd/mm/yyyy)	Est. Loan £ *	0.00
Draw Down Date*	(dd/mm/yyyy)	Status	
Client Fund %	(0% to 99%)	Est. Facility Life (Yrs) *	
Project Source*		Supplier	New
Committed Date		Commissioned Date	
Description			

Work Type	Fuel Type	kWhr Price (pence)	Annual kWhrs Pre-Project	Annual kWhrs Post-Project	Annual kWhrs Saved	% kWhrs Saved	Annual £ Saved	Annual CO2 Saved (Tonnes)
Add Work Type Update/Summary								

Figure 13 Creating a new project

3

Enter savings

Work Type

Project Title	
Work Type *	T12/T8 to LED Including new fitting ▼
Fuel Type *	Electricity ▼
Price p/kWhr *	12
Ann. kWhr Used Pre-Project *	75,000
Ann. kWhr Used Post-Proj *	45,000
% kWhrs Saved *	40
Ann. kWhr Saving	30,000.00
Ann. Financial Saving £	3,600.00
Ann. CO2 (tonnes) Savings	16.12

Figure 14 Adding the work type

4

Upload evidence

- Scope
- Costs
- Savings

Work Type	Fuel Type	kWhr Price (pence)	Annual kWhrs Pre-Project	Annual kWhrs Post-Project	Annual kWhrs Saved	% kWhrs Saved	Annual £ Saved	Annual CO2 Saved (Tonnes)	Edit
T12/T8 to LED including new fitting	Electricity	12.00	75,000	45,000	30,000	40.00	3,600.00	16.12	
Add Work Type Update/Summary									

Figure 15 New project details

Work Type	Fuel Type	kWhr Price (pence)	Annual kWhrs Pre-Project	Annual kWhrs Post-Project	Annual kWhrs Saved	% kWhrs Saved	Annual £ Saved	Annual CO2 Saved (Tonnes)	Edit
Insulation - draught proofing	Fuel Oil	7.10	177,782	162,739	15,043	8.00	1,068.05	4.05	
Update/Summary Re-payments Attached Docs									

Figure 17 Attached documents function

5

Save the project
as pipeline

If you find it necessary to 'Abandon' a project please contact your CRM

Project Title	LED upgrade
Applicant	Toton Library
Draw Down Date	01/01/2016
Project Type	LED lighting
Status	

This project is compliant

Annual Savings		Lifetime Savings			
Units kWhr	30,000.00	Units kWhr	750,000.00	£/Tonne Saved	24.81
Financial £	3,600.00	Financial £	90,000.00	Loan Payback Yrs	2.80
CO2 (tonnes)	16.12	CO2 (tonnes)	403.00	Tech. Payback Yrs	2.78

Save as Pipeline **Commit Project** **Back to Detail**

Figure 16 New project's summary page

6

Salix review

Technical assessment of
application and supporting
information

Query stage

Quality assurance check

7

Complete project

If you find it necessary to 'Abandon' a project please contact your CRM

Project Title LED upgrade

Applicant Toton Library

Draw Down Date 01/01/2016

Project Type LED lighting

Status

This project is compliant

Annual Savings		Lifetime Savings			
Units kWhr	30,000.00	Units kWhr	750,000.00	£/Tonne Saved	24.81
Financial £	3,600.00	Financial £	90,000.00	Loan Payback Yrs	2.80
CO2 (tonnes)	16.12	CO2 (tonnes)	403.00	Tech. Payback Yrs	2.78

Save as Pipeline Commit Project Back to Detail

Figure 16 New project's summary page

If you find it necessary to 'Abandon' a project please contact your CRM

Project Title 10 YRS TP C CO2 C

Applicant Test applicant

Draw Down Date 06/03/2013

Project Type LED lighting

Status Committed

Fund Source Main

This project is compliant

Annual Savings		Lifetime Savings			
Units kWhr	3,630.00	Units kWhr	90,750.00	£/Tonne Saved	152.67
Financial £	735.60	Financial £	18,390.00	Loan Payback Yrs	6.80
CO2 (tonnes)	1.31	CO2 (tonnes)	32.75	Tech. Payback Yrs	6.80

Note: You have changed the draw down date for this project. If you save changes the re-payment schedule will be re-calculated!

Save Changes Commission Project Replace and Amend Project View Loan Agreement Back to Detail

Figure 12 Project summary page

How to put a compliance tool and business case (CT & BC) together for projects over £100k?



Compliance tool

Organisation:

Programme:

Recycling Fund Scotland

Salix Finance:
Compliance Tool V38
© Salix Finance 2025

Compliance Criteria:

Payback

12 years

£/tCO₂e LT

£305

salix

District Heating Projects Only: Exclude Carbon Factor kg/kWh

Start Date

Completion Date

Site Name

Remaining Site Life (yrs)

Project Description

Data Entry Check

	Description of Work	Project Completion Date	Energy Type	Current p/kWh	Forecast p/kWh	Forecast % Change	Project Type	Technology - Work Type	Annual kWhs Pre-Project	Annual kWhs Post-Project	Annual kWh savings	% kWh savings	Project Value	Annual Financial Savings	Payback In Years	tCO ₂ e pa	£/tCO ₂ e LT	Data Entry Check
1												0%						
2												0%						
3												0%						
4												0%						
5												0%						
6												0%						
7												0%						
8												0%						
9												0%						
10												0%						
11												0%						
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15												0%						
16												0%						
17												0%						
18												0%						
19												0%						
20												0%						

> ☰

Terms and Conditions

Guidance Notes

Eligible Technologies

Project Compliance Tool

Business Case

Additionality Criteria

Definitions



Business case

Programme details

Project Title:

Organisation name:

Submission date:

Main Contact for Project

Name

Job title

Address line 1

Address line 2

City

Post code

Telephone

Email

Project Cost Breakdown

Main equipment capital costs (£)

Installation costs (£)

Project management costs (£)

Contingency costs (£)

Other project costs (£)

Total projects costs

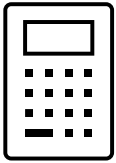
1. Cost Breakdown

Project cost breakdown - Provide commentary on the project cost breakdown.

- How have project costs been estimated?
- Do the project costs account for operation/maintenance costs?

Supporting evidence

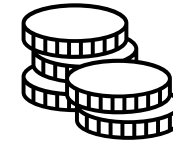
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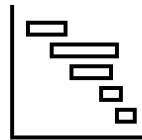
Energy Saving
Calculations



Data sheets



Cost
evidence



Project
Programme

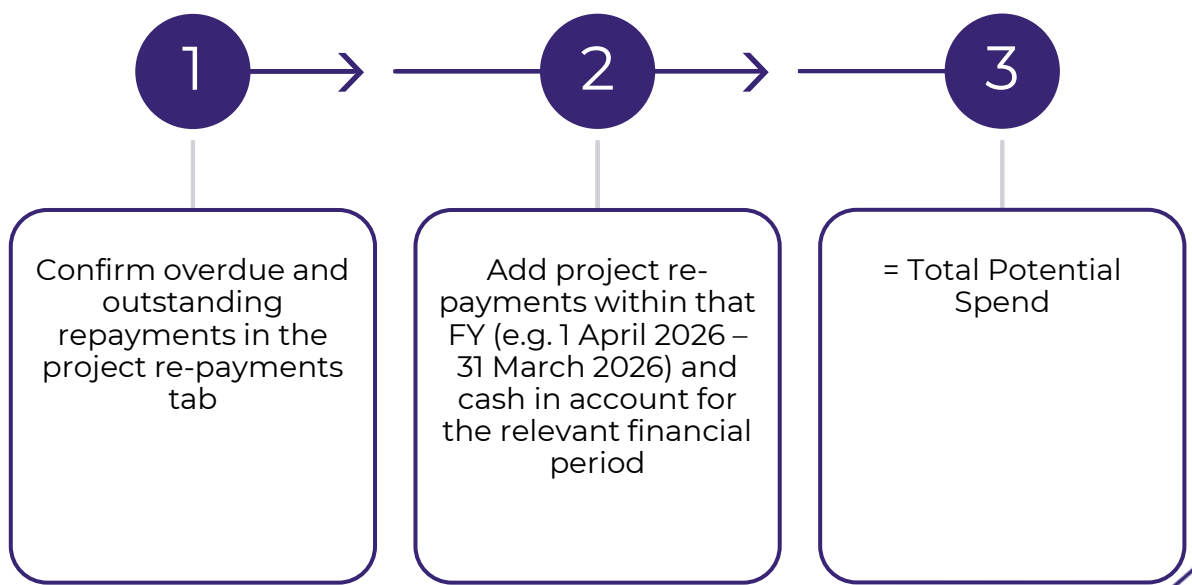


Risk
Register

How do I get projects approved quicker?

- ❑ All supporting information has been submitted
- ❑ All figures (annual kWh savings, project costs, fuel costs) in the supporting documentation align with the compliance tool
- ❑ Check the application's level of completeness
- ❑ Remaining responsive during the technical query process

How do I calculate the amount I can spend each FY? (TPS)



1

Home	Fund Payments	Contacts	Applicants	Projects	Project Re-payments	Reports	Logout
Project Re-Payments							
Select Year	All	(based on due date)					
Select Project	All						
Select Status	All Unpaid						
40 payment(s) due. Value: £891,031.96							
Project ID	Project Title	Applicant	Amount £	Due On	Status		
AL01P047	Open Lighting Control - Town Hall	Debbie	2,353.96	30/07/2015	Outstanding	Confirm Re-payment	
AL01P057	Streetsighting White Light Conversions	Chris	19,935.09	30/08/2015	Outstanding	Confirm Re-payment	
AL01P064	stone Streetsighting White Light Conversion	Chris	18,036.48	30/08/2015	Outstanding	Confirm Re-payment	

Figure 22 Overdue and outstanding repayments

2

Fund Source	Status	Scheduled Date Of Payment	Project Title	Project ID	Applicant	Project Status	Amount Paid	
Main	Payments Made	14/07/2018	10 YRS TP NC CO2 NC	CDUN01P052	Test	Commissioned	12,500.00	
		01/08/2018	10 YRS TP C CO2 C	CDUN01P047	Test applicant	Abandoned	600.00	0.00
		14/07/2021	10 YRS TP NC CO2 NC	CDUN01P052	Test	Commissioned	12,500.00	0.00
	Payments Made						25,600.00	0.00
	Payments O/S	01/05/2015	TEST	CDUN01P012	Test applicant	Committed	0.00	6,523.72
		01/05/2016	TEST	CDUN01P012	Test applicant	Committed	0.00	981.40
		30/03/2019	10 YRS TP C CO2 C	CDUN01P051	Test applicant	Committed	0.00	1,250.00
		14/07/2019	10 YRS TP NC CO2 NC	CDUN01P052	Test	Commissioned	0.00	12,500.00
		30/03/2020	10 YRS TP C CO2 C	CDUN01P051	Test applicant	Committed	0.00	1,250.00
		14/07/2020	10 YRS TP NC CO2 NC	CDUN01P052	Test	Commissioned	0.00	12,500.00
		30/03/2021	10 YRS TP C CO2 C	CDUN01P051	Test applicant	Committed	0.00	1,250.00
		30/03/2022	10 YRS TP C CO2 C	CDUN01P051	Test applicant	Committed	0.00	1,250.00
	Payments O/S						0.00	37,505.12
Main							25,600.00	37,505.12
Total:							25,600.00	37,505.12

Figure 3 Project re-payment schedule

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Report Logout

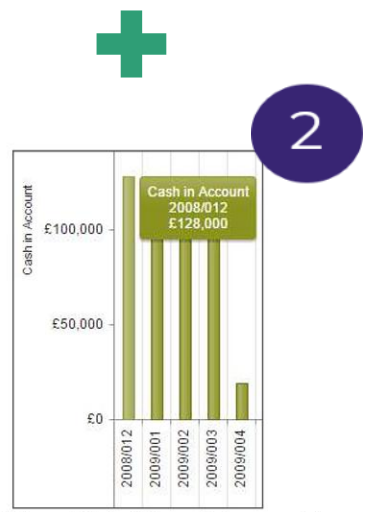
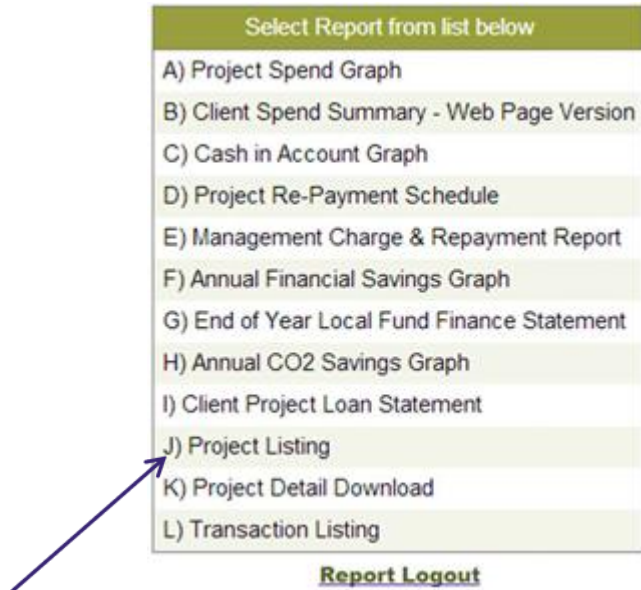


Figure 34 Hover detail of the cash in account bars

How do I pull together information from my account so I can present the data to my company?



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Report Logout

1. Project listing tab
2. Select date you would like to see data from
3. Copy and paste data into internal excel spreadsheets
4. Convert into graphs

Timeline & End of Year Process

