

Change request webinar

Phase 4 Public Sector Decarbonisation Scheme

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Agenda

- Change request process
- Supporting information required
- Project form/ Key checks
- Changes to the grant carbon cost
- 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 is a change request?

Type of change		Change request needed?
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. affect gas savings on the Support Tool (e.g. insulation, BMS)	✓
	Measures that save indirect carbon (e.g. PV, LEDs)	X
Changing the scope of existing energy efficiency measures	Measures that save direct carbon, i.e. affect gas savings on the Support Tool (e.g. insulation, BMS)	✓
	Measures that save indirect carbon (e.g. PV, LEDs)	X

Change request process



Identification

Discuss any changes with your 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. A2 W → 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>	☐ 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
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. The key changes being proposed – including any revisions to the delivery programme, specification, costs and grant payment schedule.	
Site change <i>Where relevant, 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	

<i>reference the name or the document where this evidence can be found.</i>	
Subsidy Control 1. Existing Sites: Are there any increased energy savings at existing sites that currently have non-public sector enterprises operating in them or that are leased from a non-public sector body? 2. New Sites: Will any new sites be added where non-public sector enterprises operate or which the applicant is leasing from a non-public sector body? If "Yes" to either question, you may be required to complete additional documentation. For more information on subsidy control, please visit our website.	1. ☐ Yes ☐ No If yes, please add further details below on which sites have increased savings: 2. ☐ Yes ☐ No If yes, please add further details below and in your updated application form:
Scope change <i>Where relevant, please outline:</i> 1. What measure(s) have been removed? 2. What new measure(s) have been added? 3. What measures have changed in scope?	
Evidence provided <i>Refer to the table above to determine which of the items of evidence you will need to submit for your changes. Insufficiently evidenced changes will not be assessed.</i> <i>Please confirm which information you have provided by ticking the appropriate boxes.</i>	☐ Completed project form (3c) or updated application form (3a, 3b, 4), ensuring all steps reflect the updated project scopes ☐ Updated energy saving calculations (Excel format) ☐ Updated, detailed project programme ☐ Updated risk register ☐ Updated cost breakdown with quotes, if available ☐ Data sheets ☐ Updated peak heat loss calculations ☐ Feasibility study (including options appraisal) ☐ Updated schematics ☐ End-of-life boiler evidence ☐ Building energy consumption data

Project form

- All changes to sites and measures need to be recorded on the project form
- Type of change and reasons for each change should be selected from the drop-downs

Generator (DNO) Questions					
What will be the electrical connection?	Have you contacted your DNO regarding connection to the local electricity network?	If No, please confirm the date you expect to engage with your DNO.	Comments Provide any extra commentary on your DNO connection.	Site Changes	Site Change Reason
ergrid	Yes (connection approved)			No Change	
ergrid	Yes (connection approved)			No Change	
ergrid	Yes (connection approved)			New Site	Securing Internal Approval
ergrid	Yes (connection approved)				
ergrid	Yes (connection approved)				

MPAN 3	MPAN 4	MPAN 5	MPAN 1	MPAN 2	MPAN 3	MPAN 4	MPAN 5	Building Change	Reason for Change	Internal ID
			2380002479230							2380002479230
			2380002479230							2380002479230
			2380002479230							2380002479230
			2380002479230							2380002479230
			2380002479230							2380002479230

Key checks: project form

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

Is the project compliant?

- Check the 'Step 4.1 Carbon Saving Measures' 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 kWhs Pre-Project	Annual kWhs 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	Gas	3.90	4,049,413	2,999,474

Don't forget to update the 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

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

Phase 4 policy: changes to grant carbon cost

The project's grant carbon cost must remain within 10% of the original value at GOL



£200/tCO₂

+ 10% allowance



£220/tCO₂

The maximum acceptable grant carbon cost for Phase 4 is £510/tCO₂e over the lifetime of the project for grant funded measures.

Phase 4 policy: changes to grant carbon cost

Where scope/cost changes to a project result in:

1. A grant carbon cost increase that exceeds 10% of the original GCC
2. A grant carbon cost above the maximum acceptable GCC of £510/tCO₂e

The project **must be amended** until it reaches compliance and this can be checked on a project form, in Step 4.2 Grant Selection tab.

Total Project Value (£)	Input Grant Value (£)	Recipient Contribution (£)	Recipient Contribution (%)
£602,277	£400,000	£202,277	34%

Original Project Value (£)	Original Input Grant Value (£)	Original Recipient Contribution (£)	Original Recipient Contribution %
£1,385,092.00	£600,000	£785,092	57%

Grant Carbon Cost (£/tCO ₂ eLT)	Compliance
£507.88	Compliant

Original Grant Carbon Cost (£/tCO ₂ eLT)	
£506.21	Compliant

Importance of maintaining the grant carbon cost

Ensure fairness from the allocation process

Maintain overall value for money

10% allows a degree of flexibility

Changes to grant carbon cost (GCC)

Changes in costs and changes in carbon savings in any measure may cause the grant carbon cost to change:



Options if your GCC is non-compliant

If you input new costs and/or energy savings in an updated project form and the resulting GCC exceeds the 10% tolerance, you can:

1. Reduce your grant value; or
2. Remove measures with a poorer carbon cost (shown in ascending order in step 4.2 of your project form); or
3. Our energy and carbon team can work with you to see if any eligible enabling costs may be split out.

It is **not possible** to simply increase your recipient contribution and leave the grant carbon cost at an ineligible value

Key takeaways

Ensure any changes to a project including costs and savings are communicated to Salix

Ensure that any changes to costs or savings, no matter how minor, are inputted on an updated project form to confirm your grant carbon cost is still compliant

Timelines and 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

Friday 20 November 2026

(~2 month after designs complete milestone)

Turnaround of 20 working days after submitting all supporting information

Submissions past 20 November 2026 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
- 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 31 March 2027
 - 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 2027 are expected to submit a complete change request by **Friday 20 November 2026**
- Projects with grant end date March 2028 are expected to flag any changes early as this may impact the eligibility of your claims for financial year 2026-27
- Your relationship manager will support you if you have queries related to any changes to your project

Questions?

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Thank you for listening



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