

## **Energy Saving Trust Non-Public Charge Point Funding – information for installers**

Energy Saving Trust is being funded by the Scottish Government to provide grant support to individuals and organisations wishing to install electric vehicle charge points at their premises to facilitate their operation of electric vehicles. This is provided alongside UK Government funding provided via the Office for Zero Emission Vehicles (OZEV) as part of its electric vehicle homecharge scheme (EVHS) and its workplace charging scheme (WCS). Energy Saving Trust's rules of eligibility mirror those of OZEV for its respective schemes.

Similar to OZEV, Energy Saving Trust will have two separate lists of approved installers; one of those accredited for the EVHS, the other of those accredited for the WCS. These lists will be provided to applicants as appropriate, depending on the nature of the install in question.

Due to the large number of organisations anticipated to be registered on Energy Saving Trust's lists of approved non-public charge point installers (both domestic and workplace), it is necessary to have clear, standardised processes in place for all installers to ensure effective and efficient management of the funding scheme. All approved installers must therefore comply with the processes and requirements as laid out herein and the flow diagrams in Annexes A and B at the foot of this document which illustrate the installation journeys.

### **1. Accreditation requirements**

- a. The installer must be accredited by OZEV as part of its EVHS and/or WCS.
- b. The installer can only supply units accredited by OZEV as part of EVHS or WCS, as applicable.

### **2. Installation specifications**

- a. For reasons of future proofing, an untethered charge point should be quoted for in the first instance.
- b. A 32A (7kW) charge point should be quoted for where supply is sufficient to accommodate it. Where supply is constrained, a 16A (3.5kW) charge point should be quoted for instead. For workplace installations, subject to supply being sufficient, 64A (22Kw) charge points may be quoted for.

### 3. Format of installer documents provided to applicants

During the application and installation process, the installer will be required to issue the applicant with (in order):

- a quote
- an invoice
- a paid invoice

For Energy Saving Trust's verification requirements, please provide a 'mock-up' example of the above three documents to Energy Saving Trust for review and approval. Examples of the suggested format and content of these documents are appended at the bottom of this document. These must contain the following:

- a. The name and address of a fictitious example applicant as well as the name, address, and logo of your organisation.
- b. Quotes and invoices must be itemised, making clear the following:
  - i. charge point model
  - ii. charge point power rating
  - iii. whether charge point is tethered/untethered
  - iv. whether charge point is single/double-outlet
  - v. that the unit to be installed is a smart chargepoint
  - vi. details of civils works involved and additional materials required
  - vii. warranty and maintenance costs, as applicable
  - viii. data/SIM card costs, as applicable
  - ix. bay marking costs, as applicable
  - x. back office commissioning costs, as applicable
  - xi. deduction of OZEV funding under their EVHS or WCS scheme
  - xii. both exclusive and inclusive of VAT totals
- c. Paid invoices must have a clear and consistent means of denoting that the invoice has been settled in the form of a 'PAID' stamp, or text stating 'amount due £0.00' or an equivalent – a handwritten note would not be acceptable.
- d. Invoices must correspond to the quote – where there is a discrepancy between the final invoice and the original quote, the installer must make Energy Saving Trust aware of the reasons for this as soon as possible, otherwise the funding may be withdrawn.

- e. Energy Saving Trust must be advised immediately when any change to formatting is made in order for our records to be updated.
- f. Installers must not issue the host with any invoices or arrange for the works to take place prior to the host receiving their grant offer letter from Energy Saving Trust, which will contain a grant reference number in the format **EVSSE####** for domestic installs and **EV####** for non-public workplace installs. Once the installer is in possession of this reference number, they may schedule the works with the host. The grant offer will expire three months from the date issued for domestic installs and six months for non-public workplace installs. Energy Saving Trust should be notified at the earliest opportunity of any delays to the applicant's charge point installation beyond this expiry date. Where these delays are justifiable, Energy Saving Trust may be able to offer an extension to the grant deadline.
- g. The following statement must be added to all your quotes and invoices: "Eligible for Energy Saving Trust – Chargepoint Grant".
- h. All documentation submitted must be in PDF format. We cannot accept links to documents.

#### **4. Processes and timescales**

Please refer to the schematic in the installer journey flow charts in Annexes A and B at the foot of this document to further assist understanding of processes.

- a. Following initial contact with the applicant, the installer carries out a site survey and issues a quote to the applicant for the proposed works.
- b. The installer directs the applicant to Energy Saving Trust's online portal at [cpsgrants.est.org.uk](https://cpsgrants.est.org.uk) Energy Saving Trust reviews the applicant's submission and issues the applicant a formal offer of grant funding.
- c. **Installs must not go ahead prior to a formal offer of grant funding being issued to the host.** The Installer must therefore request confirmation of Energy Saving Trust grant reference number (included within the grant offer letter) from the applicant prior to any arrangements being made for the works to take place – this will take the form **EVSSE####** for domestic installs and **EV####** for non-public workplace installs.

- d. Subsequent to install, completed Electrical Installation Certificates must be issued to the host within five working days of works completion. The Electrical Installation Certificate must be twice dated.
- e. A paid invoice must be issued to the host within five working days of receipt of payment for the works.
- f. Where a warranty for the charge point must be provided to the host a copy of this warranty must be retained by the installer.

**N.B.** In cases where there are essential additional works that must be carried out to enable an install to go ahead, but that are not within the remit of the installer, Energy Saving Trust must be made aware of this immediately, as it may impact on the grant offer letter value.

## **5. Smart charge points**

Where smart charge points are installed, they must not be connected to any network other than the ChargePlace Scotland network, unless explicit permission stating otherwise has been provided by Energy Saving Trust and Transport Scotland.

## **6. Performance monitoring**

Approved Installers' performances will be tracked on an on-going basis to ensure that processes defined herein are adhered to, and more generally that all installers' conduct remains of an exemplary standard throughout all projects. Should any given installer's performance be found to be of an unacceptable standard, Energy Saving Trust reserves the right to remove them from our list(s) of approved installers. Examples of what may be considered to constitute an unacceptable level of performance include, but are not limited to, the following:

- Installer's consistent failure to abide by Energy Saving Trust's processes and timescales, as outlined herein.
- Installer consistently charging considerably higher rates than other installers without good reason.
- Repeated failure to respond in a timely manner to queries from applicants or Energy Saving Trust.
- Repeated failure to demonstrate a high level of aftercare subsequent to job completion, not responding promptly or not providing appropriate assistance should there be any issues with the charge point(s) subsequent to installation.

- Quoting and invoicing inconsistencies against each other and their original agreed upon submissions, as per section 3.
- Installer subject to repeated negative applicant/customer feedback.
- Installer evidenced to have committed an act of gross negligence/incompetence.

Further to the above, any organisation interested in being added to one or both of Energy Saving Trust's lists of approved installers must be able to demonstrate a historic record of service of a suitably high standard. Should Energy Saving Trust have reason to believe that the organisation in question, or an employee of said organisation, has operated in a manner that is not in keeping with the standard of conduct demanded by Energy Saving Trust, Energy Saving Trust reserves the right to refuse to include said organisation on either of its approved lists of installers. Energy Saving Trust may also at its own discretion exclude an organisation from one or both of its approved installer lists should historic performance failings only become known to Energy Saving Trust subsequent to said organisation's appointment to said list(s).

## **7. Essential documents**

Energy Saving Trust must receive each of the following before an organisation can be added to our approved list(s) of non-public charge point installers:

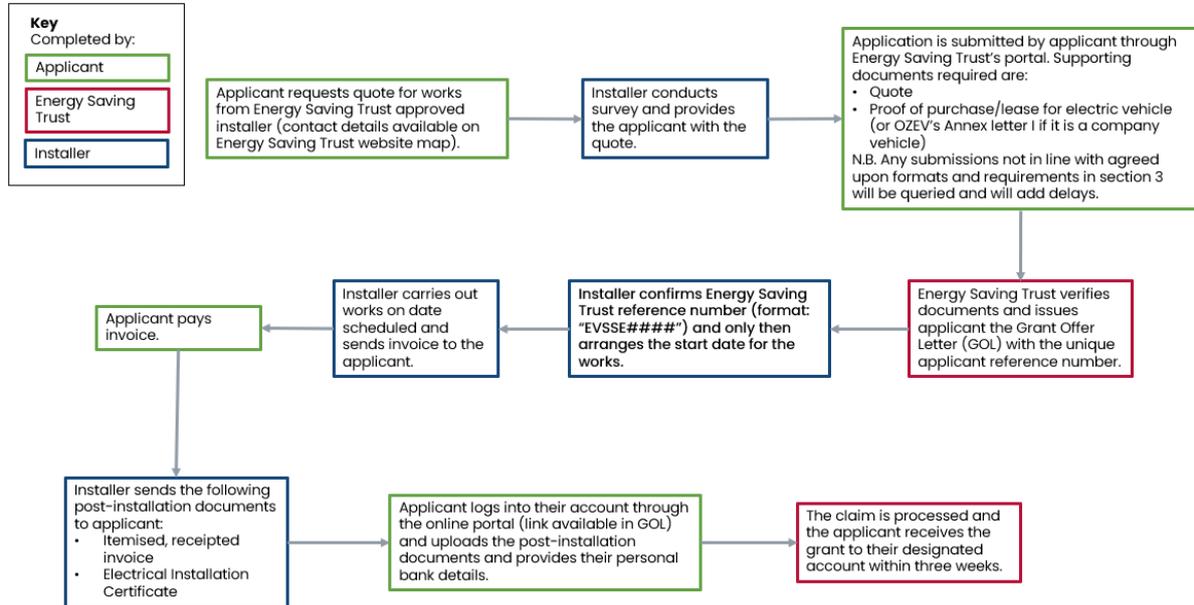
- a. A fully completed 'Energy Saving Trust Prospective Installer Details' form, which will be attached alongside this guidance document.
- b. Evidence of accreditation for the Office for Zero Emission Vehicles' Electric Vehicle Homecharge and/or Workplace Charging Scheme, as applicable.
- c. Mock up examples of each of the following documents\*:
  - i. quote
  - ii. invoice
  - iii. paid invoice

\*Please refer to section 3 of this document for a specification of the information that the quote, invoice and paid invoice should contain, and Appendix B. for an example copy.

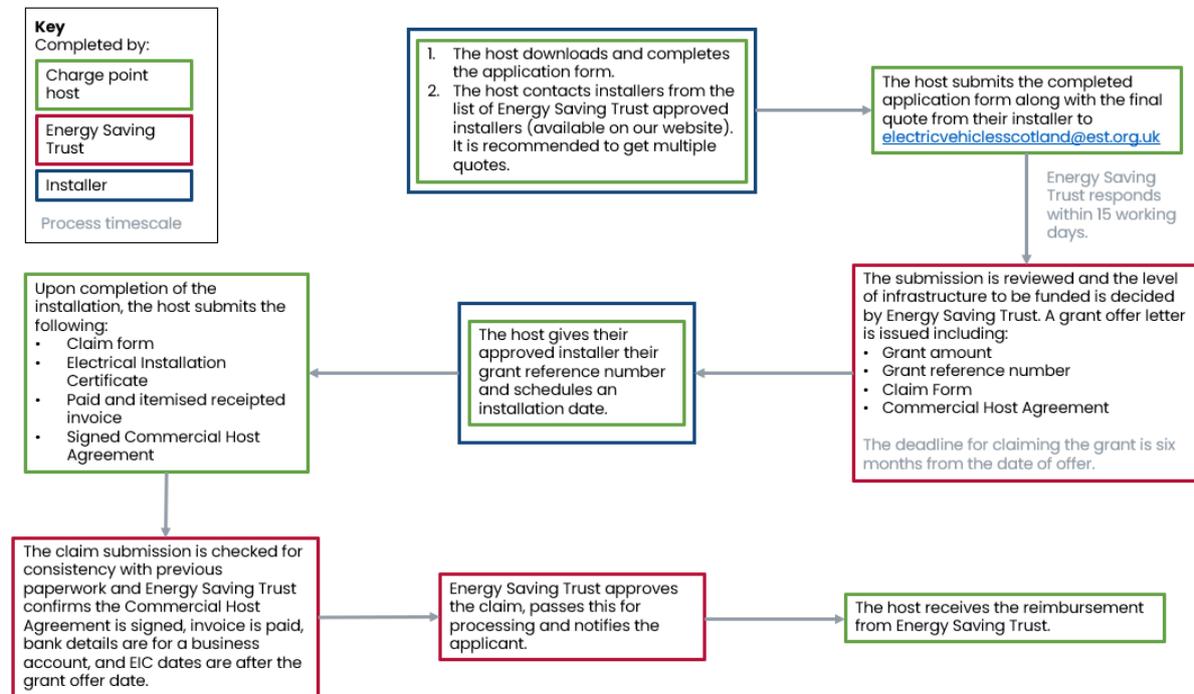
**8. Sub-contractors**

Should an organisation intend to sub-contract any or all of their works to a third party, Energy Saving Trust must receive all information provided in 7. for the sub-contractor(s) in question. Sub-contractors will be treated as an extension of the sub-contracting organisation; it is the sub-contracting organisation that will therefore be liable for any issues related to the performance of the sub-contractor(s).

## Annex A: Domestic charge point grant funding process



## Annex B: Non-public workplace charge point grant funding process



## Appendix C. Template quotes and invoices

Contents:

- a. template quotation
- b. template customer invoice
- c. template paid/receipted invoice

### Example quote

Please include in your own invoice all details pertaining to the items and figures in bold, as well as any other details as applicable. Using your own format is fine but please make sure the invoice is very clear.

|  |
|--|
| <b>Date:</b> 01/01/2021                            |
| <b>Project:</b> (Name of applicant's organisation) |
| <b>Compiled by:</b> Installer's staff member       |

|                       |
|-----------------------|
| <b>Installer LOGO</b> |
|-----------------------|

|  |
|--|
| <b>Customer address</b><br>Customer Road<br>G0 000 |
|--|

|   |
|---|
| <b>Installer address</b><br>Installer Road<br>EH0 000 |
|---|

Dear Mr/Ms \_\_\_\_\_

**RE: Quotation for Electric Vehicle Charging Point**

Some information is to be included about the installation(s).

| Item number | Description  | QTY | Total Cost |
|-------------|--|-----|------------|
| 1           | <b>Name and brief but comprehensive description of unit to be installed (1 row per unit) as per section 3.b.</b> |     | £xx.xx     |
| 2           | <b>Additional items – list individually (eg additional cabling and civil works)</b>                              |     | £xx.xx     |
| 3           | <b>Labour costs</b>  |     | £xx.xx     |
|             | <b>Site total</b>  |     | £XX.XX     |
|             | <b>OZEV Discount</b>   |     | -£350.00   |
|             | <b>Project Total excl. VAT</b>   |     | £XX.XX     |
|             | <b>Project Total incl. VAT</b>   |     | £XX.XX     |

Please include any additional information that you would usually include with such a quote, for example a description of maintenance contract; terms and conditions of sale etc.

# energy saving trust

## Example invoice

Please include in your own invoice all details pertaining to the items and figures in bold, as well as any other details as applicable. Using your own format is fine but please make sure the invoice is very clear.

Invoice number: 00012345

Date: 01/01/2021

**Installer LOGO**

Customer address

Customer Road  
G0 000

Installer address

Installer Road  
EH0 000

| Item number | Description   | QTY | Total Cost |
|-------------|---|-----|------------|
| 1           | Name and brief but comprehensive description of unit to be installed (1 row per unit) as per section 3.b. |     | £xx.xx     |
| 2           | Additional items – list individually (eg additional cabling and civil works)                              |     | £xx.xx     |
| 3           | Labour costs  |     | £xx.xx     |
|             |   |     |            |
|             | OZEV Discount   |     | -£350.00   |
|             | Site total  |     | £xx.xx     |
|             | Project Total excl. VAT   |     | £xx.xx     |
|             | Project Total incl. VAT   |     | £xx.xx     |

Your company VAT number  
Your company registration  
number

Additional company details  
here

Your company contact details

Information on how to pay

Subtotal: £xx.xx

VAT: £xx.xx

Total to pay: £xx.xx

## Example paid invoice

Please include in your own invoice all details pertaining to the items and figures in bold, as well as any other details as applicable. Using your own format is fine but please make sure the invoice is very clear.

Invoice number: **00012345**  
Date: 12/12/2019

**Installer LOGO**

Customer address  
Customer Road  
G0 000

Installer address  
Installer Road  
EH0 000

| Item number | Description   | QTY | Total Cost |
|-------------|---|-----|------------|
| 1           | Name and brief but comprehensive description of unit to be installed (1 row per unit) as per section 3.b. |     | £xx.xx     |
| 2           | Additional items – list individually (eg additional cabling and civil works)                              |     | £xx.xx     |
| 3           | Labour costs  |     | £xx.xx     |
|             |   |     |            |
|             | OZEV Discount   |     | -£350.00   |
|             | Site total  |     | £XX.XX     |
|             | Project Total excl. VAT   |     | £XX.XX     |
|             | Project Total incl. VAT   |     | £XX.XX     |

Your company VAT number  
Your company registration number  
Additional company details here

Your company contact details

Subtotal: £XX.XX  
VAT: £XX.XX  
Total to pay: £XX.XX  
Total to pay: £0.00  
  
Please clearly indicate that the customer has paid, with either a £0 balance or a dated paid stamp.

Please send your templates, documents, and form to our email address here:  
electricvehiclesscotland@est.org.uk.