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The Provision of a Technical Audit of Non-domestic Charge Points for OLEV
Appendix A – Service Description

APPENDIX A
SERVICE DESCRIPTION

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1. INTRODUCTION

- 1.1 The Office for Low Emission Vehicles (OLEV) seeks a service provider or providers to conduct audits of (i) domestic and (ii) non-domestic charging infrastructure funded through its various grant schemes by making on-site visits to carry out technical/electrical assessments at the addresses of a sample of installations.
- 1.2 This Service Description is for the contract to provide services in respect of the non-domestic charging infrastructure audit.

2. PURPOSE

- 2.1 The purpose of the on-site visits to a sample of non-domestic chargepoint installations is to determine the level of compliance, by grant claimants and installers, of the terms and conditions of OLEV's various infrastructure grant schemes.

3. BACKGROUND TO THE AUTHORITY

- 3.1 OLEV is part of the Department for Transport (DfT) and the Department for Business, Energy & Industrial Strategy (BEIS). OLEV is a team working across government to support the early market for ultra-low emission vehicles (ULEV). We are providing a package of nearly £1.5bn to position the UK at the global forefront of ULEV development, manufacture and use. This will contribute to economic growth and will help reduce greenhouse gas emissions and air pollution on our roads.
- 3.2 OLEV has had a number of infrastructure grant schemes to support the early ULEV market to help with the cost of domestic chargepoints at home and help with providing charging infrastructure away from home.

4. BACKGROUND TO REQUIREMENT/OVERVIEW OF REQUIREMENT**Background to requirement**

- 4.1 For OLEV-funded non-domestic chargepoint installations, an audit is required to give a level of independent and objective assurance of compliance by the installers and customers – this is to be done through on-site visits to installations for the non-domestic charging infrastructure grant schemes which are in scope of this requirement (see Section 5).
- 4.2 Non-domestic chargepoints are typically (i) slow chargers (less than 7Kw) or fast chargers (7Kw to 22Kw) for off-street, workplace, opportunistic or destination charging; or rapid chargers (greater than 22Kw, typically 50Kw DC/43Kw AC) to facilitate the longer journeys. For WCS, see the minimum technical specifications for full details at <https://www.gov.uk/government/collections/government-grants-for-low-emission-vehicles#workplace-charging-scheme>. As part of the current non-domestic charging infrastructure grant scheme requirements, it is required that usage data is captured and is made available to OLEV.

Overview of requirement (by grant scheme)**Workplace Charging Scheme (WCS)**

- 4.3 The WCS provides grant funding for workplaces towards the cost of installing workplace chargepoints for use by staff and/or fleets to charge their electric vehicles.
- 4.4 The number of chargepoint installations for the WCS as at end of April 2018 is approximately 700.
- 4.5 For the WCS, this audit will involve desk-checks and on-site visits to a sample of non-domestic customers with chargepoint installations to ensure compliance with the grant

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scheme/grant award letter terms and conditions. A copy of the current WCS guidance (version 2.0 July 2018) is annexed to this document.

On-street Residential Chargepoint Scheme (ORCS)

- 4.6 The ORCS provides grant funding for local authorities towards the cost of installing on-street residential chargepoints for residents who don't have off-street parking facilities.
- 4.7 The number of chargepoint installations for the ORCS and the preceding Local Authority On-street Chargepoint Scheme as at the end of June 2018 is 7.
- 4.8 For the ORCS, this audit will involve on-site visits to a sample of non-domestic customers with chargepoint installations to ensure compliance with the grant scheme/grant award letter terms and conditions. A copy of the current ORCS guidance (version 1.1 January 2018) is annexed to this document.

Other non-domestic schemes

- 4.9 There might be other schemes (existing or future) for which OLEV may wish to include at a later time in this audit, for example the Ultra Low Emission Taxi Infrastructure Scheme and the Charging Infrastructure Investment Fund.
- 4.10 For other non-domestic schemes, this will involve on-site visits to a sample of non-domestic customers with chargepoint installations to ensure compliance with the relevant grant scheme/grant award letter terms and conditions.

5. SCOPE OF REQUIREMENTS

- 5.1 All requirements are to be considered mandatory.
- 5.2 The grant schemes in scope for this audit are the:
- WCS;
 - ORCS; and
 - Other non-domestic schemes as agreed with OLEV.
- 5.3 Desk-checks (for the WCS) and on-site visits are required for a sample of installations completed under the above-mentioned schemes.
- 5.4 On-site visits should be conducted by experienced and qualified electrical inspectors. The experience should consist of time served as a qualified electrician and of time served as an electrical inspector. The minimum qualifications should be C&G 2391 & 2392, C&G 2360 Part 1 and 2 with AM1 & 2 or equivalent. The electrical inspectors needs to be conversant with the theoretical intentions of the technical specifications for installations of chargepoints.

Auditing grant claims under the WCS

- 5.5 OLEV will provide a sample of 10% of average monthly non-domestic chargepoint installations, currently about 200 (10% of 2,000).
- 5.6 The service provider will be required to arrange appointments with a maximum of 50% of the sampled 10% to carry out on-site visits to the sampled installations, so that up to 5% of average monthly non-domestic chargepoint installations are audited (subject to the overall value of the contract).
- 5.7 Subject to the overall value of this contract, OLEV might require additional desk-checks and on-site visits to a number agreed with OLEV following any arising concerns.

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- 5.8 The service provider will be required to carry out a desk-check prior to an arranged on-site visit.
- 5.9 The service provider will need carry out the following checks as a minimum:
- 5.10 Desk-checks:
- Check the claim evidence including claim form and photographs for each chargepoint installation to determine any indication of a high risk of non-compliance with any of the terms and conditions as outlined in the WCS guidance documents (e.g. evidence of subsidisation, standardisation or over-inflation of costs for stated time and materials); and
 - Each desk-check to be recorded on a desk-check worksheet.
- 5.11 On-site visit checks:
- Determine that a chargepoint has been installed and is working;
 - Determine that the chargepoint installation meet the requirements set out in the WCS guidance documents;
 - Determine compliance with technical specifications (eg. chargepoints are fitted safely and securely; meeting the requirements set out in the Institution of Engineering and Technology Code of Practice; UK wiring regulations; and building regulations);
 - Assess the chargepoint installation to determine that the stated time and materials taken are realistic and make a judgement as to whether or not declared costs are a true reflection of actual costs; and
 - Each on-site visit to be recorded on an on-site worksheet (with photographs).
- 5.12 The service provider will provide summary reporting (as detailed below).

Auditing grant claims under the ORCS

- 5.13 The service provider will be required to carry out on-site visits for the ORCS sampled from all the installations carried out under this schemes to ensure the grant scheme is being implemented appropriately. The sample size is expected to be no more than 5% of the number of installations under ORCS and the sample will be provided by OLEV (subject to the overall value of the contract).
- 5.14 Subject to the overall value of this contract, OLEV might require additional desk-checks and on-site visits to a number agreed with OLEV following any arising concerns.
- 5.15 The service provider will need to carry out the following checks for each chargepoint installation as a minimum:
- Prior to the on-site visit, verify that the chargepoint is listed in the National Chargepoint Registry;
 - On-site visit checks:
 - Determine that a chargepoint has been installed and is working;
 - Determine that the chargepoint installation meets the requirements set out in the grant offer letter and scheme guidance documents;
 - Determine compliance with technical specifications (eg. chargepoints are fitted safely and securely; meeting the requirements set out in the

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Institution of Engineering and Technology Code of Practice; UK wiring regulations; and building regulations.); and

- Each on-site visit to be recorded on an on-site worksheet (with photographs).

5.16 The service provider will provide summary reporting (as detailed below).

Auditing grant claims under other non-domestic schemes

5.17 The service provider will be required to carry out on-site visits for other non-domestic schemes as agreed with OLEV to ensure that the scheme(s) are being implemented appropriately. The sample will be provided by OLEV (subject to the overall value of the contract).

5.18 Subject to the overall value of this contract, OLEV might require additional desk-checks and on-site visits to a number agreed with OLEV following any arising concerns.

5.19 The service provider will need to carry out the following checks for each chargepoint installation as a minimum:

- Prior to the on-site visit, verify that the chargepoint is listed in the National Chargepoint Registry (where appropriate);
- On-site visit checks:
 - Determine that a chargepoint has been installed and is working;
 - Determine that the chargepoint installation meets the requirements set out in the grant offer letter and scheme guidance documents;
 - Determine compliance with technical specifications (eg. chargepoints are fitted safely and securely; meeting the requirements set out in the Institution of Engineering and Technology Code of Practice; UK wiring regulations; and building regulations.); and
 - Each on-site visit to be recorded on an on-site worksheet (with photographs).

5.20 The service provider will provide summary reporting (as detailed below).

Reporting

5.21 Summary reports should be produced every month and submitted to OLEV electronically using a mixture of formats to display information concisely and legibly so they are understandable (e.g. narrative, graphs, charts and tables) demonstrating the range of audit checks.

5.22 The format of the summary reports is to be determined in agreement between OLEV and the service provider, subject to that the summary reports should include as a minimum:

- the numbers of checks carried out (broken down by scheme) by desk-checks and on-site visits to chargepoint locations;
- the number of issues found broken down by issue type;
- the number of monthly passes/fails;
- cumulative number of checks in the financial year;

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- cumulative number of issues broken down by issue type in the financial year; and
- cumulative number of passes/fails in the financial year.

5.23 A final review report document is to be provided by the service provider and agreed by OLEV within 4 weeks of the end of the on-site visits. The final review report is to include lessons learned from both the various infrastructure grant schemes and on the on-site visits audit, with recommendations for the grant schemes including any for risk reduction.

6. SERVICE LEVELS AND PERFORMANCE

6.1 OLEV will measure the quality of the service provider's delivery by achievement of Milestones in The Project Timetable below:

6.2 OLEV shall have the right to require the service provider to include any reasonable changes or provisions in The Project Timetable.

6.3 The service provider shall perform its obligations so as to achieve each Milestone by the Milestone Date.

6.4 Changes to the Milestones shall only be made in accordance to an agreed variation procedure and provided that the service provider shall not attempt to postpone any of the Milestones using the variation procedure or otherwise (except in the event of a OLEV default which affects the service provider's ability to achieve a Milestone by the relevant Milestone Date).

6.5 OLEV will monitor the service provider's performance through monthly, and ad hoc reporting and through review meetings. Review meetings will be monthly, but for the first 2 months will be every two weeks to ensure the smooth transfer of administration. Ad hoc meetings can be arranged to discuss any issues which arise.

6.6 At the end of the contract, OLEV requires the service provider to do a handover, with a final review report.

7. LOCATION

7.1 The location of the chargepoint installations for OLEV's infrastructure grant schemes are across the United Kingdom.

8. SECURITY REQUIREMENTS

8.1 The service provider will hold and process data that is marked as OFFICIAL-SENSITIVE (PERSONAL) under HMG Security Policy Framework and must comply with its mandatory requirements for data processing. The service provider has a duty of confidentiality and a responsibility to safeguard the data (in accordance with the General Data Protection Regulation [GDPR]) that they process and shall not to use it for any purpose other than is necessary to fulfil these requirements.

8.2 There might be instances that information originally provided by commercial concerns will be commercially sensitive.

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9. PROJECT TIMETABLE

Milestone	Deliverables	Duration (Working Days)	Milestone Date	OLEV Responsibilities (if applicable)
Inception of project	Clear Project Plan for the on-going activities of desk-checks and on-site visits.	20 (over 4 weeks)	4 weeks following commencement of the awarded contract.	OLEV will liaise with service provider regarding the project and to attend review meetings and ad-hoc meetings as required.
Desk-checks and on-site visits of WCS monthly sampled domestic chargepoint installations.	Desk-checks evidenced by production of desk-check worksheets On-site visits evidenced by production of on-site worksheets and photographs; and monthly summary reports for on-site visits	Ongoing	Monthly	OLEV will provide the locations of the sampled chargepoint installations for desk-checks; and on-site visits OLEV will liaise with service provider regarding summary report format and contents OLEV to attend review meetings
On-site visit audit of ORCS sampled chargepoint installations	On-site visits evidenced by production of on-site worksheets and photographs; and monthly reports for on-site visits	As agreed with OLEV	As agreed with OLEV	OLEV will provide the locations of the sampled chargepoint installations for desk-checks; and on-site visits OLEV will liaise with service provider regarding summary report format and contents OLEV to attend review meetings
On-site visit audit of other non-domestic scheme(s) sampled chargepoint installations	On-site visits evidenced by production of on-site worksheets and photographs; and monthly reports for on-site visits	As agreed with OLEV	As agreed with OLEV	OLEV will provide the locations of the sampled chargepoint installations for desk-checks; and on-site visits OLEV will liaise with service provider regarding summary report format and contents OLEV to attend regular review meetings to review outcomes to date
Production of a final review report document	Final review report document	20 (over 6 weeks)	6 weeks following last required monthly period desk-checks and on-site visits.	OLEV will liaise with service provider regarding final review report format and contents with regular meetings to review final report data and quality assure the final report

10. BUDGET

10.1 OLEV requires for the following:

- a blended pricing with a capped element and a call-off element;
- the capped element being:

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- (a) a fixed price for the overheads of the contract;
- the call-off element being:
 - (a) a fixed price for each desk-check of a WCS non-domestic chargepoint installation;
 - (b) a fixed price for each on-site visit of a WCS non-domestic chargepoint installation;
 - (c) a fixed price for each on-site visit of an ORSC chargepoint;
 - (d) a fixed price for each on-site visit of a slow charger (less than 7Kw) for other non-domestic schemes;
 - (e) a fixed price for each on-site visit of a fast charger (7Kw to 22Kw) for other non-domestic schemes; and
 - (f) a fixed price for each on-site visit of a rapid charger (greater than 22Kw, typically 50Kw DC/43Kw AC) for other non-domestic schemes.

The above excludes any travel and subsistence costs. Travel and subsistence costs to be submitted as expenses and are to be in accordance with Department for Transport Travel and Subsistence policies.

These should be submitted in pounds sterling and be inclusive of expenses and exclusive of VAT.

- 10.2 The duration of this contract will cover the period from contract start date to end of September 2020 with the option to extend at OLEV's discretion by one month.
- 10.3 OLEV would expect invoices to be issued in line with the satisfactory completion of the deliverables in accordance with The Project Timetable.