

## Energy Advisor Service Level Agreement & Contract

**Parties:** This agreement is between 361 Community Energy CIC (company number 08377598) and **NAME OF COMPANY/SOLE TRADER (COMPANY NUMBER OR UTRN FOR SOLE TRADER)**

**Contract Term:** 1 September 2020 to 31 March 2021

**Service Provision:** Delivery of the Fuel Poverty and Home Energy Advice

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The 361 Fuel Poverty Service supports vulnerable people across North Devon and Torridge through the provision of outreach activities, energy clinics, one to one advice, telephone advice service, home energy visits and client case work. The Service is funded by a number of funders as well as contracts to deliver the LEAP programme. **NAME OF COMPANY** agrees to the following delivery outputs and terms to help 361 Community Energy CIC deliver its fuel poverty service:

### 1. Service Requirements

- Agree to help deliver objectives and targets set by 361 Community Energy CIC necessary to facilitate and report evidence to funders for the delivery of the Fuel Poverty Service.
- Promote the Priority Service Register service at events and home energy advice to help meet Western Power Distribution targets.
- Organise and deliver outreach activities, clinics and events which engage vulnerable people who may be in fuel poverty.
- Delivery of Home Energy telephone advice and home visits and delivery/installation of small energy efficiency measures.
- Identify new and work with existing partners to maximise the impact of the delivery of the service including attending / presenting at meetings to facilitate this process.
- Give presentations and training to frontline workers and volunteers on matters related to Fuel Poverty and provide information of help and support available to their clients through the service.
- Mentor and give guidance to Assistant Energy Advisors and volunteers supporting the Project.
- Support clients with more complex cases related to energy and water issues.
- Keep up to date, secure and confidential records of activities undertaken with clients and savings achieved.
- Attend CPD activities and training in line with service provision.
- Participate in auditing to ensure service levels are upheld by energy advisors.
- Undertake these activities intensively in allocated postcode areas and in general across the region to support the whole Energy Advisor team.
- Stand in for other energy advisors where necessary.
- Other duties in relation to the fuel poverty service.

### 2. Level of Support

Each Energy Advisor will be qualified to City & Guilds Level 3 Energy Awareness or equivalent relevant experience or qualifications and will be able to provide the following level of support to vulnerable clients:

- Give impartial advice on energy tariff switching and support clients through the switching process.
- Help clients apply for the warm home discount and water social care tariffs.

- Advice of behaviour change issues to improve people's understanding of energy efficiency and empower their own actions to save energy and money.
- Advice on how to read meters, set programmers and correct use of heating controls.
- Advice and referrals for ECO measures such as new boilers and wall / loft insulation.
- Advice and referrals for new heating controls.
- Priority Service Register registrations.
- Smart Meter advice.
- Advice and fitting of energy efficiency measures such as LED bulbs, TV standby plugs, radiator reflectors and draught proofing.
- Energy and water debt advice and applications on behalf of clients for energy and water debt grants.
- Advice on consumer rights and complaints including supporting clients with erroneous mistakes caused by energy companies' administrative errors or incorrect meter readings
- Support clients with meter upgrades e.g. change E7 meters to standard, PAYG to credit meters.
- Referrals to other local services in relation to projects supporting vulnerable clients such as Income Maximisation, Wessex Loans, Fire Service home visits and social prescribers.
- Other items as directed by project managers associated with energy efficiency advice and support for vulnerable clients.

### **3. Marketing and Awareness**

Energy Advisors will be proactive in raising awareness of their activities by supporting 361 PR and marketing activities in their defined local postcodes areas and across the region using 361 Empower branding and resources including:

- Disseminate 361 literature e.g. postcards, flyers and posters through partner networks and locations and other key facilities such as GP surgeries, town and parish councils, local shops and estate agents, community halls, social housing communal areas.
- Use of 361 posters and branded materials /images to disseminate information about events and clinics.
- Raise awareness of 361 activities and events through other local media such as parish newsletters and other free advertising media e.g. 'what's on' items in local papers.
- Provide content and images for use on social media and the 361 website to post items about activities and forthcoming events.
- Write ups, photos and press releases to be used and published for the 361 newsletter, website and local media such as activities undertaken and information about case studies (with agreed consent of any participants).
- Support 361 with other awareness raising activities as directed by the 361 Marketing Coordinator.
- Provide feedback to project managers and record activities in relevant documents (such as the Western Power Distribution PSR spreadsheet or the Events register) to ensure accurate reporting necessary for different projects.

### **4. Professionalism & Support**

Energy Advisors agree to act on behalf of 361 Community Energy CIC in a professional and impartial manner. Energy Advisors must act in a non- judgemental and sympathetic way to support vulnerable clients. Energy Advisors are not to discuss client cases or the business operations of 361 Energy without prior consent of parties involved.

## **5. Health & Safety**

Energy Advisors must follow the H&S working practices of their own company in compliance with relevant legislation but also carry out their duties in line with 361 Community Energy CIC Health & Safety, Safeguarding, Equal Opportunities and Environmental Policies.

Energy Advisors must carry out risk assessments of their work taking necessary mitigation and precautions in the delivery of their service. In particular they must ensure their lone working practices, Covid 19 precautions and use of equipment including correct use of ladders is carried out and adhered to.

Energy Advisors must ensure activities do not fall outside the insurance indemnity policy which covers contractor activities on behalf of 361 Energy.

Energy Advisor must provide their own equipment and PPE.

## **6. Data Protection & Safeguarding**

Accountability for the appropriate protection of data lies with **NAME OF COMPANY/SOLE TRADER**. All data collected and recorded regarding clients must be kept securely to ensure confidentiality of clients. Clients must be made aware of the purpose and recipients of all data sharing. They must give their consent to the sharing of their information to other organisations such as LEAP and the Western Power Priority Service Register in line with the 361 Community Energy CIC Data Protection Policy.

Data such as client's information, documents and photos must be stored on work security protected electronic devices or data sharing programmes. Client outputs recorded must be entered via encrypted and password protected online spreadsheets and via password protected company email (under no circumstances should personal email be used containing client information). Any paperwork pertaining to client personal details must be kept in lockable storage and no paperwork to be left in unattended bags or out on visible work surfaces.

All electronic equipment such as hard drives, laptops and tablets containing client's data must be password protected and encrypted and must be stored in locked storage such as a safe or a locked room when not in use. At end of life these data storage devices must be disposed of appropriately to avoid leakage of any sensitive data.

### **6.2 Safeguarding**

All energy advisors who conduct telephone advice and home visits must have an up to date fully enhanced DBS certificate.

When conducting telephone advice, home energy visits or energy advice clinics, the energy advisor must be aware of their responsibilities to make appropriate referrals for safeguarding purposes including - human trafficking and slavery; domestic violence, coercion and abuse; mental health and vulnerability to suicide; self-harm; terrorism; unsafe properties; child abuse; animal abuse; criminal activity or any other concern for the safety of a client or others.

## **7. Identity**

Energy advisors must carry and wear their identity lanyard for home visits and events. 361 Energy CIC branded uniform should also be worn for visits and events.

Use of Sub-contractors

Should the advisor not be able to provide elements of specialist knowledge or skills required for the position, they may employ the services of a sub-contractor to deliver those required services. When selecting a sub-contractor, the advisor must ensure they are qualified, DBS certified and equipped to carry out visits to the standard specified in this contract. This includes the adherence to GDPR data protection policy (as stated in section 6) and correct management of onward referrals.

## **8. Termination**

The service agreement may be terminated by either party giving one month's notice in writing to the other party. 361 Community Energy reserves the right to terminate the agreement upon non-delivery of expected outputs and outcomes. Upon notice served the Advisor agrees to handover all confidential data, materials, stock, knowledge and intellectual property to allow minimum disruption and inconvenience to delivery of the Fuel Poverty Service.

## **Monitoring, Management & Evaluation of Objectives and Targets**

Energy Advisors must attend reporting meetings. They will also agree to be audited against the provision of this service level agreement.

Each funding stream and contract delivery service has associated objectives and targets in terms of output required by agreed delivery dates. It is the responsibility of the contractor to understand and actively drive these targets. If there is a problem in the delivery of these targets the contractor agrees to inform 361 Community Energy as soon as possible to review resource issues and target delivery.

Output spread sheets must be completed regularly and thoroughly to project managers for reporting purposes.

## **9. Payment & Invoices**

Payment rates for delivery are set according to the fund or contract agreed by the provider and 361 Community Energy CIC. The following rates currently apply but may vary for future activities:

£20/ hour for one to one contact work including events, clinics, home visits and casework

£20/ hour for Front line worker training

£15/ hour for support work such as attending Fuel Poverty related meetings, partner meetings, project management and marketing activities.

£10/ hour for Assistant Energy Advisors for helping at events

£32 / LEAP telephone advice call (this includes pre and post visit admin)

£40 /LEAP Home visit

£10/Small Measures Delivery

£5/Smart Meter Referral

£5/PSR Registration

£0.45/mile for travel associated with project work (not LEAP home visits/deliveries)

Invoices must be sent in before the 17th of each month for the previous months completed work. Different invoices may be expected in accordance with different project delivery budgets. The advisor

accepts responsibility for accurate calculating and invoicing the charges. Invoices must be accompanied by a completed 361 Community Energy monthly time sheet recording activities, mileage and expenses to correct project budget code. Invoices will be paid within 30 days barring any disputes. Failure to send invoices on time and incorrect billing may result in late payment and also impacts 361 Community Energy CIC in terms of budgeting arrangements. This could affect future workload allocation to the contractor.

Invoices should be forwarded to the project manager, at least one director & the Treasurer to agree payment.

**10. Insurance**

361 Community Energy CIC maintains liability insurance to help cover activities of contractors delivering services on its behalf which covers liability for attending events, home energy advisor telephone calls, visits and fitting of small energy efficiency measures. Activities outside these arrangements must be insured separately.

Contractors must provide copies of their own insurance.

**11. Complaints Procedure**

If a complaint is received regarding the activities of an Energy Advisor in the delivery of their contracted service which cannot be immediately resolved, the 361 Energy complaints procedure will be engaged, and contractors will have to respond to complaints within the specified time lines outlined by the procedure.

**Continued Professional Development**

All contractors agree to undertake CPD to ensure they are up to date with Energy Advice issues and Fuel Poverty services. This is expected as part of delivery of the service. However, from time to time and by pre agreement by the 361 Board of Directors, CPD activities may be covered by a bursary. Some training may be eligible for payment at a pre agreed amount if it is in connection with the delivery of a Project or LEAP training.

**Other Terms & Conditions**

Contractors agree to the terms of service as provided by 361 Community Energy CIC customers such as Agility Eco for the delivery of LEAP visits and as specified in contracts associated to funding requirements.

The contract for service delivery by Energy Advisors may be subject to change in accordance with existing and new 361 Community Energy contracts or funding requirements.

On behalf of NAME OF COMPANY

Name

Position -----

Signed..... Date

On behalf of 361 Community Energy CIC

Name

Position: Director Signed Date .2020