

Managed Electrification Scope & Terms

Managed Electrification is a portfolio of best-in-class professional services specifically designed to ease the transition to electric mobility. From route planning and energy modeling to design, contractor procurement, and construction project management, we work with you to make informed charging decisions for every step of your EV charging project (the "Project").

Our in-house experts create a customized solution designed for your charging infrastructure needs – whether you need standalone expertise or full management. From design to deployment, we've got you covered. The following professional services are available:

Phase	Service
Design	Fleet & Energy Route Modeling
	Desktop Assessment
	Site Layout
	On-Site Technical Assessment
	Pre-Engineering Design
	Utility Application Support
Selection	Budget Estimate
	Contractor Procurement
Deployment	Engineering Design Review
	Construction Project Management

The "Deliverable" for each professional service is defined in the "Detailed Scope of Work" for that service. ChargePoint shall be free to provide material similar to the Deliverable to third parties whose needs may be similar to customer's requirements. Each party's use of the Deliverables shall be in compliance with its confidentiality obligations to the other party.

The table below describes the details the scope of work, deliverables, timeline, and customer responsibilities for each professional service in the Managed Electrification portfolio. All ChargePoint Managed Electrification professional services are subject to the ChargePoint Deployment and Consulting Services Terms and Conditions, as amended from time to time by ChargePoint, found at <https://www.chargepoint.com/legal/deployment-consulting-services>.

Service	Scope & Terms
Design	
Fleet & Energy Route Modeling	Detailed Scope of Work
	• Summary: Fleet logistics analysis service, identify energy requirements to model and optimize charging infrastructure. Priced per site. • Scope of Work ○ Fleet Charging Needs Assessment: Determine energy requirements based on the customer-provided fleet logistical data, accounting for buffer to support future growth. ○ Energy-optimized Charging Hardware: Propose optimized charging hardware selection and design, accounting for utility service upgrade cost and timeline, as well as weighing capital cost vs. ability to delay charging to optimize utility costs. ○ Utility Cost Modeling and Optimization: Recommend the best utility tariff for the chargers and summarize overall charging costs to support the fleet. ○ Consultation: 1h virtual consultation after completion of assessments, modeling and optimization if requested by customer. • Deliverable: document detailing out fleet and energy route modeling results, including summary of energy requirements, proposed optimized charging hardware, recommended utility rates and summary of overall costs. • Timeline: Time to completion can take 3-4 weeks and can start once customer provides required documentation under Customer Responsibilities. Work is considered complete once Deliverable is provided to the customer.
	Specific Terms & Conditions
	• Customer Responsibilities: Provide current energy assessments, route data, vehicle data, battery data, 12 months of electric bills and 1 year of 15-minute interval data for the site, and any CO₂ abatement or corporate goals.
Desktop Assessment	Detailed Scope of Work
	• Summary: Initial remote consultation to assess charging needs and electrical infrastructure to support development of a Site Layout. Priced per site. • Scope of Work ○ Initial consultation: Schedule call with client to understand site objectives, use case and other considerations. ○ Charging Needs Assessment: Size energy requirements and propose charger quantity and type, based on vehicle type/quantity/routes, vehicle consumption average and other data provided by the customer, as applicable. ○ Electrical Infrastructure Assessment: based on charging needs assessment, size high-level electrical requirements and comparison to current utility service to determine any service upgrade needs. ○ Final Consultation: 1h virtual consultation after completion of assessment, if requested by customer. • Deliverable: document summarizing proposed charging and electrical infrastructure needs. • Timeline: Time to completion can take 2-3 weeks and can start once customer provides required documentation under Customer Responsibilities. Work is considered complete once Final Consultation is complete.
	Specific Terms & Conditions

	• Customer Responsibilities: Provide preferred charging equipment locations, satellite maps (if outdoor) or floorplans (if indoor) including locations of electrical panels, traffic flow/on-site logistics/potential obstructions if applicable, single point of contact to interface with ChargePoint’s designer, facility electrical drawings (including single line diagrams for each power feed to the facility – utility and other generators), 12 months of electric bills and 1 year of 15-minute interval data for the site.
Site Layout	Detailed Scope of Work
	• Summary: Development of Site Layout and address any customer questions regarding install guide/site design guide. Layout includes charger and ancillary equipment locations, as well as charging station electrical needs. Priced per site. • Scope of Work ○ Design: Develop high-level site layout including locations and electrical ratings for chargers and existing ancillary equipment potentially interfacing with the chargers (e.g., generators), utility service location and point of interconnection (the “Site Layout”). Based on information provided during a desktop assessment and/or on-site technical assessment. ○ Consultation: 1h virtual consultation after completion of i the Site Layout, if requested by customer. • Deliverable: document with top-down view of the site including locations and electrical ratings for chargers and existing ancillary equipment potentially interfacing with the chargers (e.g., generators), utility service location and point of interconnection. • Timeline: Time to completion can take 2-3 weeks and can start once customer provides required documentation under Customer Responsibilities. Work is considered complete once Deliverable is provided to the customer.
	Specific Terms & Conditions
	• Customer Responsibilities: Purchase of Desktop Assessment service from ChargePoint.
On-Site Technical Assessment	Detailed Scope of Work
	• Summary: On-site assessment of electrical and civil infrastructure to support the development of a Pre-Engineering Design. Priced per site. • Scope of Work ○ Site Due Diligence: Conduct pre-assessment briefing to align on goals with stakeholders at each site. Determine applicable ADA requirements. Contact local AHJ to verify permit requirements, submittal details, review timelines and fees. Assessment of on-site electrical equipment including switchgears, utility service and point of interconnection. ○ Map of Site Conditions: Draft a map of site conditions including ADA and AHJ requirements, location of switchgear, utility service, interconnections, and transformers. ○ Topographical map: Topographical heat map and slope readings of parking areas surrounding desired charging equipment locations. • Deliverable: document summarizing site due diligence, map of site conditions including details in Scope of Work above, and Topographical map. Only included if site conditions are not constrained by the physical environment limitations such as (heights, interior or exterior walls, ceilings, low clearances, obstacles, local rules or regulations, etc.), the locations must allow for a safe, non-restricted aerial survey assessment to be completed. • Timeline: Time to completion can take 3-4 weeks and can start once customer provides required documentation under Customer Responsibilities. Work is considered complete once the Deliverable is provided to the customer.
	Specific Terms & Conditions

	• Customer Responsibilities: Provide point of contact that can be available onsite to support ChargePoint with due diligence. Designate all desired charging equipment locations.
Pre-Engineering Design	Detailed Scope of Work
	• Summary: Development of pre-engineering design package including CAD layout and electrical single-line diagram. Priced per site. • Scope of Work ○ Initial Consultation: Schedule call with client to confirm customer preference for location of EV chargers based on findings from On-Site Technical Assessment. ○ Design: Prepare CAD layout and electrical single-line diagram. ○ Final Consultation: 1h virtual consultation after initial completion of the designs, if requested by customer. ○ Documentation: Provide charging equipment documentation including install and site design guides. • Deliverable: CAD layout, electrical single-line diagram and charging equipment documentation including install and site design guides. • Timeline: Time to completion can take 4 weeks and can start once customer completes the Customer Responsibilities. Work is considered complete once the Deliverable is provided to the customer.
	Specific Terms & Conditions
	• Customer Responsibilities: Purchase of Desktop Assessment and On-Site Technical Assessment services from ChargePoint.
Utility Application Support	Detailed Scope of Work
	• Summary: Engagement with utility provider to consult on customer requirements to enable customer or contractor to complete/submit utility application. Priced per site. • Scope of Work ○ Due Diligence: Determine whether the existing service is sufficient, or a new service is required, by comparing the Site Layout with the facility electrical drawings and photos of electrical panels. ○ New Service Support: If a new service is required, engage the utility to determine availability of electrical capacity, correct service voltage, potential lead times for utility design and new service construction, estimated fees (if applicable), and contractor responsibilities. ○ Utility Application: Assist the customer or contractor in completing the utility application. • Deliverable: document detailing out results of utility due diligence, including new service details noted in the Scope of Work above. • Timeline: Time to completion can take 2 weeks, excluding time waiting for the utility, and can start once customer provides required documentation under Customer Responsibilities. Work is considered complete once Deliverable is provided to the customer.
	Specific Terms & Conditions

	• Customer Responsibilities: Purchase of Site Layout service from ChargePoint. Provide utility bill, facility electrical drawings (including single line diagrams for each power feed to the facility – utility and other generators), and up to date photos of electrical panels, authorization for ChargePoint to coordinate with the Utility, as needed. Customer solely is responsible for submitting the Utility Application.
Selection & Deployment	
Budget Estimate	Detailed Scope of Work
	• Summary: Preparation of rough order of magnitude ('ROM') estimate for high-level economic qualification of a site. Priced per site. • Scope of Work ○ Prepare rough order of magnitude ('ROM') costs based on historical benchmark data, subject to change until final numbers are quoted by a Contractor. • Deliverable: Excel and PDF budget estimate for the site., • Timeline: Time to completion can take 4 weeks and can start once the customer provides required documentation under Customer Responsibilities. Work is considered complete once the Deliverable is provided to the customer.
	Specific Terms & Conditions
	• Customer Responsibilities: Purchase of Pre-Engineering Design service from ChargePoint, specify any unique customer requirements (e.g., prevailing wage, buy America requirements, union labor requirements etc.
Contractor Procurement	Detailed Scope of Work
	• Summary: Competitive sourcing of engineering, procurement, and construction (EPC) services for the EV charging project. Includes bid package development, qualification, award, and support with EPC contract negotiations. Priced per Site. • Scope of Work ○ Bid Package Development: Create standardized bid package including site design requirements, equipment specifications and timelines. Invite qualified contractors to bid process. ○ Award: Evaluate and compare bids from contractors. ○ Pricing & Scope Negotiation: Assist customer with their pricing and scope negotiations for the final contract with the contractor. • Deliverable: Creation of a standardized bid package, detailed bid comparison, and recommendation of a contractor. • Timeline: Time to completion can take 4 weeks and can start once customer provides required documentation under Customer Responsibilities. Work is considered complete once the Deliverable is provided to the customer.
	Specific Terms & Conditions
	• Customer Responsibilities: Dedicated point of contact to support with the drafting of the bid package and qualifying/selection of the final contractor. Contact information for any preferred contractors. Specify any unique customer requirements (e.g., prevailing wage, buy America requirements, union labor requirements etc.). Purchase of Pre-Engineering Design service from ChargePoint.
Engineering Design Review	Detailed Scope of Work
	• Summary: Review of drawing sets prepared by professional engineer contracted by customer to ensure compliance with ChargePoint stations for optimal make ready. Priced per site.

	• Scope of Work ○ Review: Review of engineering designs prepared by professional engineer contracted by customer; Comparison to ChargePoint specifications; Provide 1x markup of engineering designs and/or summary report of required changes and rationale. Additional markups may be provided as agreed by customer and ChargePoint in writing. ○ Consultation: 1h virtual consultation after completion of markups and/or summary if requested by customer • Deliverable: CD90 or equivalent permissible plan-set markup and/or support report • Timeline: Time to completion can take 2 weeks and can start once customer provides required documentation under Customer Responsibilities. Work deemed complete once markup and/or summary report is provided.
	Specific Terms & Conditions
	• Customer Responsibilities: provide CD90 or equivalent permissible plan-set, contact information for original drafter.
Construction Project Management	Detailed Scope of Work
	• Summary: Consultative construction project management service, where ChargePoint operates as an owner's representative and technical resource to drive the project to completion, managing all aspects including schedule, budget, and stakeholders, for a specific site. Priced per site. • Scope of Work ○ Project Coordination: Manage construction kick-off meeting; Regularly scheduled coordination meetings with contractor and customer based on agreed-on cadence; Maintain running punch list of outstanding construction actions; Manage and track schedules; Manage issues which may impact the schedule or the budget; Track project costs; Analyze and make recommendations on contractor change orders ○ Construction Management: Coordinate with customer's contractor on procurement of long lead time equipment (switchgear, transformers, EVSE, etc.); Permitting Coordination with contractor; Virtual inspections with contractor/customer-supplied images; On-site rough inspection visit before trench backfill and wiring, if needed; Manage logistics of CP hardware delivery; Coordinate with contractor to schedule utility upgrades and energization; Project management installation and commissioning of ChargePoint charging stations; Work with contractor to ensure final punch list is completed; Coordination of close-out and customer handover • Timeline: Can start customer provides required documentation under Customer Responsibilities. Time to completion is variable based on project requirements, utility capacity, and equipment availability. Work is considered complete once EV charging site is fully commissioned, activated and operational with close out of contractor's punch-list
	Specific Terms & Conditions
	• Customer Responsibilities: provide signed agreement with contractor, final engineering designs and site license (if applicable); assist in coordination with contractor including escalations; manage all payment activities with the contractor; facility access for on-site visits and inspections; identify a point of contact to interface with ChargePoint on an ongoing basis

The following terms apply to the use of each Deliverable:

Customer may use each Deliverable for Customer's own business purposes relating to the site.

Customer shall not (i) provide, or provide access to, a Deliverable to any third party that supplies EV charging stations, operates a network of EV charging stations, or provides cloud services for EV charging stations, or (ii) use the Deliverable in connection with the installation or operation of EV charging stations that are not registered and activated on ChargePoint's network of EV charging stations and operated using ChargePoint's cloud services for EV charging stations.