



Creative Lighting Promotion – **RFP**

June 11, 2013

Dear Prospective Energy Efficiency Program Partner:

New Jersey's **Clean Energy** Program™ (NJCEP), ("Program"), which is sponsored by the New Jersey Board of Public Utilities, is pleased to announce the Fiscal Year 2014 New Jersey Creative Lighting Promotion. The goals of the Fiscal Year 2014 Creative Lighting promotion are to (1) promote ENERGY STAR® qualified lighting products in New Jersey, (2) educate consumers on the benefits and uses of energy efficient lighting and appliances, and (3) to promote New Jersey's other clean energy programs such as provide qualified leads for the Home Performance program.

In the fiscal year 2014, the Creative Lighting promotion will limit this initiative to the offer of qualified discounted CFL's, LED's and advance power strips through community and corporate events. In the fiscal year 2014 the Program will not provide incentives for promotion give aways.

There will be two possible tracks in the fiscal year 2014 for Partner Participation in NJCEP Lighting promotions. A separate RFP, released at the same time as this one, offers manufacturers, distributors, New Jersey retailers and other partners (Trade Ally Partners) the opportunity to use program incentives to reduce the retail prices of ENERGY STAR qualified lighting products through product retail "markdowns". If you are interested in pursuing a markdown promotion, and did not receive the Fiscal Year 2014 markdown RFP, please request a copy from the Program (the deadline for the fiscal year 2014 markdown applications is the same as for this RFP **5:00 PM EDT June 30, 2013**)

Proposed activities for the Creative Lighting promotion should pursue two primary goals: The first is to target residential customers who have been under-represented in past NJ Lighting promotions. The second is to encourage residential customers to move beyond the "first step" of using energy efficient CFL products and to adopt more significant energy efficiency measures. For 2012, the Program will look for Partners to describe community and/or corporate event based outreach efforts that offer discounted ENERGY STAR qualified lighting products/advance power strips and clearly identify methods for tracking participation in other NJCEP programs (such as the NJCEP Home Performance program).

To participate in the fiscal year 2014 NJ Creative Lighting promotion Partners must respond to this solicitation with a completed application by **5:00 PM EDT June 30, 2013**. This application must include:

- A cover letter describing the proposed promotion in detail
- A completed 2013-2014 Creative promotion communication and marketing plans
- A completed 2013-2014 Creative Lighting application form (see attached)

Programs and funds for the fiscal year 2014 New Jersey Creative Lighting Promotion are pending NJCEP Board approval expected to be announced the last week of June, 2013. All awards will be contingent on final Board approval of programs and budgets. The program reserves the right to cancel or modify the fiscal year 2014 solicitation as per the Board's final approval. The Program will award Partners the right to use incentives on a competitive basis as described below. For more details, please see the attached Promotion Requirements and Guidelines.

If you have any questions, please contact David Wolk at (800) 225-0127 ext. 3122.

Sincerely,

New Jersey's Clean Energy Program™

Enclosures

New Jersey's Clean Energy Program™ 2013-2014

Creative Lighting Promotion – RFP

Frequently Asked Questions

WHO IS ELIGIBLE TO SUBMIT A PROPOSAL AS A PROGRAM PARTNER? Eligible partners may include any Trade Ally Partner (lighting manufacturers, distributors and New Jersey retailers) as well as e-commerce retailers, non-profit organizations and other energy efficiency services providers.

WHAT TYPES OF ACTIVITIES ARE ELIGIBLE? The ability to receive Program incentives will be awarded to Partners based on the quality of the proposals, and at the discretion of the Program. The Program's goal for projects under the Creative Lighting RFP is to offer discounted CFL's, LED's and advance power strips to residential customers which have been under-represented in past NJ Lighting promotions through community and/or corporate events. In 2013-2014 the Program will not provide incentives for promotion give aways. Another goal is to provide a clear path for residential customers to move beyond the "first step" of using energy efficient CFL products and adopt more significant energy efficiency measures. Specifically, we would like to see proposals that include lead generation for other NJCEP programs such as the Home Performance program.

WHAT PRODUCTS ARE ELIGIBLE FOR INCENTIVES? Only lighting CFL and LED products that are qualified under ENERGY STAR (as of most recent list on energystar.gov website) are eligible. Some exclusions apply, please see Section IV below. Advance power strips are also eligible for incentives.

HOW ARE THE INCENTIVES PAID? Partners sign an agreement with the Program Market Manager detailing the objectives of the promotion, the numbers of ENERGY STAR qualified lighting products to be included in the promotion, and how Program incentives will be applied to meet promotion objectives. To aid in tracking progress and to ease accounting, incentives will be paid based on a set rate per ENERGY STAR qualified product delivered. Partners must submit an **approved** data report documenting that the agreed upon number of eligible products have been delivered, and that other promotion milestones have been met, in order to receive incentives.

WHO CAN APPLY? Any Trade Ally Partners with a creative approach (as described in this RFP) for promoting ENERGY STAR qualified CFL's, LED's and advance power strips may submit an application. Trade Ally Partners are welcome to respond to both the markdown and Creative Lighting RFPs. **Under the Creative Lighting RFP only two proposals per Partner may be submitted for consideration.**

HOW MUCH MONEY IS AVAILABLE? The minimum creative request that will be considered in 2013-2014 is \$50,000. For 2013-2014, **no single Partner shall be awarded more than \$1,000,000** in Creative Lighting promotion funding

HOW WILL MY APPLICATION BE EVALUATED? Each application will be scored on:

- Effectiveness at reaching residential customers who have not participated before in the NJCEP Energy Efficient Product Program
- Ability to cross market and help motivate residential customers to participate in other NJCEP programs. Any proposed cross-marketing activities and methods for gauging their level of effectiveness should be detailed in the proposal. This should include clear documentation of lead generation and tracking of customers' participation in other energy efficiency NJCEP programs.
- The application of high quality, ENERGY STAR qualified CFL and LED products
- Ability to provide high quality data documenting progress towards goals and invoice backup.

- Clarity of the implementation plan.
- Prior program participation performance with a similar promotion

Proposals must also explain how the Partner will make the most efficient use of incentive funds, and maximize Program participation per Program incentive dollar spent (Please refer to Section II on page 5 for promotion evaluation criteria and consideration.)

HOW DO I GET STARTED? Review the application materials, including the Promotion Guidelines. Complete the application materials, including the Application Form and Funding Worksheet.

WHAT ARE THE IMPORTANT DATES?

| | |
|---|--------------------------|
| 2013-2014 Creative Lighting applications due | 5:00 pm on June 30, 2013 |
| Promotions Start | Upon signed agreement |
| Promotions End - no later than | December 31, 2013 |
| Documentation for any final incentive reimbursement due | January 15, 2014 |

WHERE DO I SUBMIT MY APPLICATION OR GET MORE INFORMATION? Proposals must be submitted electronically to the email address below and a hardcopy may be sent by post. (You may request an electronic version of the application):

David Wolk
 Energy Efficiency Programs Manager
 david.wolk@honeywell.com

New Jersey's **Clean Energy** Program
 c/o Honeywell
 145 Route 46 West
 Wayne, NJ 07470
 Attn: David Wolk
 800-225-0127 ext. 3122; Fax 973-890-1531

2013-2014 NJCEP Creative Lighting Promotion

Promotion Requirements and Guidelines

I. Application Components

1. **Project Description:** Please provide a description, **no more than 7 pages**, of the proposed 2013-2014 Creative Lighting promotion. Describe each component of the promotion including the objectives of the proposed activities and the expected impact those activities will have on the penetration of ENERGY STAR qualified products, on program participation by underserved residential customer segments, and on leads generated and rate of participation by residential customers for participants in other NJCEP programs. The description must also indicate how New Jersey's Clean Energy Program messaging will be incorporated into these activities throughout the promotion (submit sample messaging with proposal). Clearly describe the role of each participating party (i.e. manufacturers, corporate partners, municipalities, citizen volunteers, etc.) Note which party will be the primary contact and who will submit the proof of performance documentation.
2. **Use of Program Incentives:** In the proposal, please explicitly break out how incentives will be used. Also provide detail on costs incurred in pursuit of other promotion activities such as marketing, outreach to non-participants and/or identifying potential leads for other NJCEP programs. All costs will need to roll up to a per unit incentive for each qualified ENERGY STAR product proposed.

Proposals for the use of program incentives should be developed on a pay-for-performance basis. Making Program payments to Partners on an incentive-per-unit basis both ensures that the Program pays for measureable performance, and allows comparison of cost-effectiveness between proposals.

3. **Sample Proof of Performance Documentation:** Payments for incentives under the 2013-2014 Creative Lighting RFP will be made based upon proof of performance reports showing progress toward goals described in the proposal and included in the agreement with Program management. Proposals must include sample reports in order to be considered. The sample reports must be approved by the Program prior to final agreement with the Program. Reports should be provided on a monthly basis unless a less frequent period is agreed. Final documentation for all incentive payments must be submitted no later than January 15, 2014.
4. **Timeline:** A complete application must include a timeline for the proposed promotion, including the anticipated start date and end date for each activity, and any other important dates. Projects may begin as soon as the Partner agreement is signed, and end by no later than December 31, 2013.

II. Proposal Evaluation Criteria & Consideration

Proposals that meet the promotion requirements will be evaluated based on the following criteria:

1. **Ability to recruit non-participants.** Proposals should target residential customers who have not participated in past NJ Lighting promotions.
2. **Ability to incorporate** common 2013-2014 NJCEP messaging in preparation of marketing and communications materials.
3. **Lead generation for other programs.** Proposals should describe how a promotion will help residential customers to adopt more significant energy efficiency measures through participation in other NJCEP activities such as the Home Performance program. Include sample documentation for lead generation and tracking of customers participation in other NJCEP programs
4. **Clear Strategy and Reporting.** Proposal should include a detailed plan for documenting progress toward stated objectives, and for reporting such progress.
5. **Verified Quality Product.** Preference will be given to ENERGY STAR qualified lighting products that have undergone additional, independent, third party testing not paid for by the manufacturers with results indicating performance meeting or exceeding ENERGY STAR requirements.
6. **Ability to Leverage Resources.** Proposals should indicate resources the Partners are providing to the project, including but not limited to financial contributions.
7. **Customer Education.** Preference will be given to proposals that use targeted messaging to clearly communicate the features and benefits of ENERGY STAR qualified products, and that effectively describe other NJCEP program benefits.
8. **Performance:** Experience with delivery of similar promotion and prior program participation performance.

III. Promotion Requirements and Guidelines

- **Partners must provide communications throughout the promotion indicating that the activity (and associated products) is provided courtesy of New Jersey's Clean Energy Program™.** A standard template for using Program logos will be provided.
- The ENERGY STAR logo and Program logo(s) must be identified in promotional communications.
- Only promotions conducted in a manner that will reach New Jersey residents shall be eligible for promotion funds. The Program reserves the right to reject proposals that are not targeted mostly to New Jersey residents.
- All marketing materials must be submitted to the Program management for approval before distribution.

IV. General Eligibility

Proposals considered under the Creative Lighting RFP should include promotions that cover the following eligible products:

- ENERGY STAR qualified screw-based compact fluorescent light bulbs (CFL), LED light bulbs and advance power strips
- All promotional products must be qualified under the most current version of the relevant ENERGY STAR specification.(as listed on www.energystar.gov)

To be eligible to participate in the promotion, Partners must meet the following criteria:

1. Partners must complete all approved promotions by December 31, 2013. Promotional activities undertaken after December 31, 2013 will not be eligible for incentives.
2. Partners will cooperate fully with Program requests for information on specific promotional activities.
3. Partners will cooperate fully with Program field staff and provide access to promotional events, ENERGY STAR products in inventory, etc.
4. Partners must have a method for tracking and recording the actual (or estimated) impact of the proposed activities.

In no event will the Program make any payments to Partners prior to the execution of a signed agreement.

Partners shall report immediately any suspected incidents of irregularities or fraud to the Program.

Reimbursements of incentives will be made only upon submission by Partners of proof of performance showing actual progress towards objectives during the promotion period ending December 31, 2013. Requests for reimbursement must be consistent with the objectives, metrics and incentive amounts included in the agreement between the Partners and the Program.

The Program reserves the right to verify proof of performance documentation submitted. If all elements of the proposed project(s) are not complete, or adequate proof of performance is not submitted by the specified date, the Program reserves the right to pro-rate the amount of the payment to reflect only the portion of the project that was completed and documented. Fraudulent documentation may result in prosecution, termination from the promotion, and non-payment of all outstanding claims.

The Program will monitor the progress of activities during the promotional period by comparing submitted proof of performance documentation against sales milestones included in the agreement between the Program and the Partners. If milestones are not met, the Program reserves the right to reduce the amount of incentives awarded.

The Program reserves the right to impose additional requirements, as necessary, in order to maintain the integrity of the Program.

The promotion design and funding outlined in these rules and related promotion materials reflect the current intent of New Jersey's Clean Energy Program™ and the New Jersey Board of Public Utilities (BPU), but may be modified by the Program at any time and without prior notification. The Program may terminate a project at any time for non-compliance.

Partners cannot state or imply that they have been rated, ranked, or endorsed by the Program. Partners may not use or display any of the logos, names, or identity unless approved in advance by the Program.

It is the Partner's responsibility to ensure that all uses of the ENERGY STAR logo and name associated with activities co-funded under this promotion comply with ENERGY STAR program requirements.

New Jersey's Clean Energy Program™
ENERGY STAR® 2013-2014 Creative Lighting Promotion

Application Form

To be complete, your application **must** include all of the following information:

| | | | |
|---------------------|--------|--------------|--|
| Contact Name: | | Company: | |
| Mailing Address: | | | |
| City: | State: | Zip Code: | |
| Contact Phone: | | Contact Fax: | |
| Email Address: | | | |
| Project Partner(s): | | | |

ENERGY STAR qualified Promotional Products (Check all that apply):

- Compact Fluorescent Lamps (CFLs) Specialty CFLs (describe) _____
 LED Light Bulbs Advance Power Strips

1. **Provide a description of your proposed project as an attachment, using the attached guidelines provided in Section I.**
2. **List of all parties participating in the proposed promotion:** All parties with a critical role in determining the success of the proposed promotional activity should sign this form.

| | |
|------------------------------|--------------------------------------|
| Signature of Primary Partner | Signature of Second Critical Partner |
| Name (printed or typed) | Name (printed or typed) |
| Date | Date |

| | |
|-------------------------------------|--------------------------------------|
| Signature of Third Critical Partner | Signature of Fourth Critical Partner |
| Name (printed or typed) | Name (printed or typed) |
| Date | Date |

By signing this document, you certify that:

1. You have read, understand, and agree to the attached Promotion Requirements and Guidelines.
2. The information in this proposal is true and correct. You understand that submission of misleading, untrue, or incorrect information will be grounds for disqualifying all of the proposed activities in this proposal.