

ENERGY STAR® Products Partner Meeting

ENERGY STAR Awards

Partner of the Year Application - Energy Efficient Program Delivery



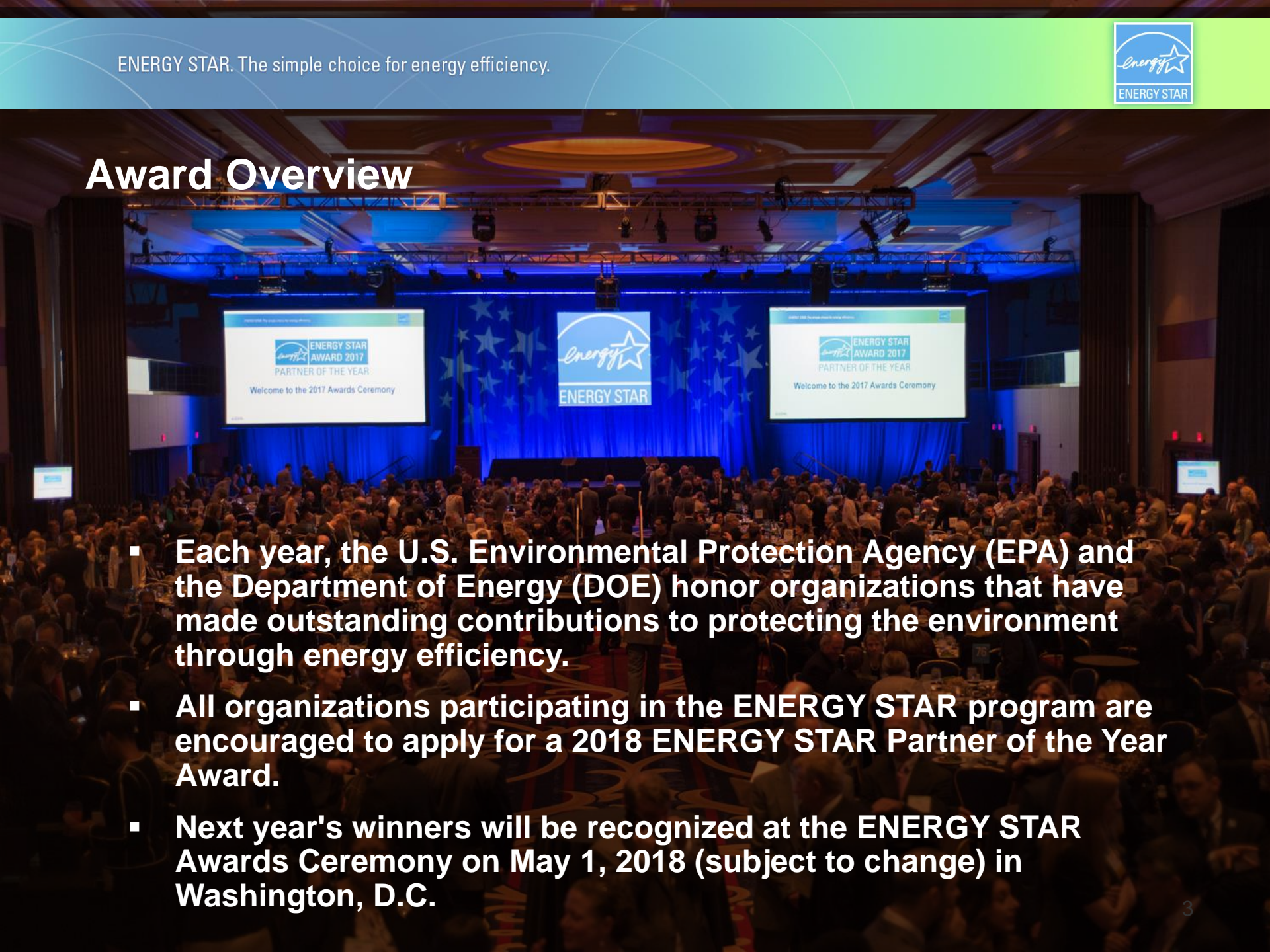
Tuesday, October 24, 2017
Chicago, IL

Overview

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- What you need to apply
- Top tips
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- Energy efficient program delivery application overview
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Award Overview

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- Each year, the U.S. Environmental Protection Agency (EPA) and the Department of Energy (DOE) honor organizations that have made outstanding contributions to protecting the environment through energy efficiency.
 - All organizations participating in the ENERGY STAR program are encouraged to apply for a 2018 ENERGY STAR Partner of the Year Award.
 - Next year's winners will be recognized at the ENERGY STAR Awards Ceremony on May 1, 2018 (subject to change) in Washington, D.C.



General Instructions: What you Need to Apply

- MESA account info
- Name and title of your organization's CEO/President
- Name of your company
 - Make sure it appears exactly as you would want it written on your crystal and all other communications materials about the awards
- Your award narrative in PDF

Home > Partner Resources > Login to My ENERGY STAR Account

Login to My ENERGY STAR Account

User Name: *

Password: *

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Overview of ENERGY STAR Awards: Top Tips for Applying

- Answer Every Question
 - Complete the application to the best of your ability—if you don't have the answer explain why. (Note: Every question has a point value.)
- Show Improvement
 - If you have won before, demonstrate how you continue to improve.
- Quantify your results and provide examples
 - Where applicable, quantify your activities and the results (e.g., percent improvement, growth in ENERGY STAR market share, number of media impressions), and include electronic copies of documentation that support claims made (e.g., promotional materials, sample ads with the ENERGY STAR mark, copies of training materials used, etc.).
 - Provide your best examples of ENERGY STAR stewardship (share your best examples that showcase ENERGY STAR branding).
 - Ensure that supplemental material demonstrates proper ENERGY STAR logo use according to the ENERGY STAR Brand Book (see: www.energystar.govbrandbook).
 - **Any instances of logo violations will strongly impact the review of the application.**



Organization Description Examples

- **In one sentence, describe your organization (Character limit: 200 including spaces).**
 - Example: Habitat for Humanity of Greater Nashville has been building energy-efficient homes for low-income families since 2006.
- **In one sentence, tell us something distinguishing about your organization's ENERGY STAR efforts (Character limit: 200 including spaces).**
 - Example: EnergyLogic, Inc. has been verifying homes for the ENERGY STAR® Certified Homes program for more than 15 years, helping home builders construct better, more efficient homes.
- **In one or two sentences, state why your organization should receive the award (Character limit: 350 including spaces).**
 - Example: Nationwide Marketing Group is receiving recognition for its ongoing commitment to promoting energy efficiency and ENERGY STAR product sales. The company has distinguished itself by developing a high-quality, comprehensive, and effective set of ENERGY STAR marketing and advertising materials for its independent retail store members.



Accomplishment Bullet Examples

- *Increasing year over year sales of key ENERGY STAR products by 13 percent for certified lighting, 76 percent for certified air purifiers, and 38 percent for the combined certified product categories: windows, doors, insulation, vent fans, water heaters, and heating, ventilation and air conditioning (HVAC) equipment.*
- *Being among the first utilities in the nation to launch the ENERGY STAR Retail Products Platform, a new approach to bringing energy efficient products to consumers by asking retailers to take a more comprehensive view of energy efficient products and targeting incentives toward increased inventory of ENERGY STAR certified products across multiple categories.*
- *Benchmarking 100 percent of its client buildings in EPA's ENERGY STAR Portfolio Manager®.*
- *Expanding its energy benchmarking reporting requirement using ENERGY STAR Portfolio Manager to more than 5,000 multifamily owners nationwide.*
- *Building more than 8,000 ENERGY STAR certified homes in 2016, for a cumulative total of more than 100,000 certified homes since partnering with ENERGY STAR in 2000.*

For more examples view online Profiles in Leadership
<https://www.energystar.gov/about/awards/awards-archive>



Guidance on Supplemental Materials

- **Optional supplemental materials** – Photos, pamphlets, copies of advertisements, videos, audio files, etc. can be uploaded with your application.
- **Files Size** – Most text, image, and video formats are accepted and each file must be less than 12 MB. File names must be no longer than 15 characters (no spaces or special characters).
- **Consolidate Files** – If you have many print files, please consolidate them into one or two PDF files.



Partner of the Year – Energy Efficiency Program Delivery

Who can apply?

- This award is open to utilities, state agencies, regional energy efficiency nonprofit organizations, associations, and other organizations that sponsor sustained energy efficiency and environmental programs.
- Please note that **for-profit energy service and product providers are not eligible** for this award category and are redirected to the application for **Service and Product Providers under the Partner of the Year category**.

What does this award recognize?

- Demonstrated leadership and best practices in implementing energy efficiency program and/or program portfolios that incorporate ENERGY STAR as a key strategy.
- Use of ENERGY STAR tools and resources as a cost-effective approach to achieve (or to be positioned to achieve) significant impact in the marketplace advancing energy efficiency and related greenhouse gas emission reduction objectives.



Program Categories

- Applicants may apply in one or more of the following four Program Categories.
 - Residential New Construction
 - Home Performance with ENERGY STAR
 - Certified Products
 - Commercial & Industrial
- If applying in more than one Program Category, organizations are strongly encouraged to submit one comprehensive application to most effectively convey their strategic use of the ENERGY STAR platform and partnership in advancing energy efficiency.
- NOTE: For organizations that have been recognized with ENERGY STAR Awards in past years, the award evaluation committee will evaluate applicants not only on their ability to sustain successful strategies from prior years, but on the new strategies and activities initiated in 2017. Applicants are encouraged to respond accordingly in their narratives.



Category 1: Residential New Construction

Programs that promote the construction of ENERGY STAR certified homes and apartments by implementing program elements such as the following:

- Design approaches that are based on the local housing market and unique program goals and reflect the most important regional factors for program success;
- Marketing strategies that increase awareness of ENERGY STAR certified homes and apartments;
- Training sessions to help stakeholders be successful program participants;
- Strategic incentive structures that help to offset upgrade costs and encourage participation;
- Outreach approaches that create strong relationships with stakeholders, communicate procedures and expectations, and share important program information;
- Quality assurance protocols to ensure the integrity of the ENERGY STAR label and the EEPS program; and
- Measurement and evaluation processes to assess progress and attainment of goals and facilitate continuous improvement in the implementation of the program.



Category 2. Home Performance with ENERGY STAR

Innovative Sponsors and Partners of Home Performance with ENERGY STAR Programs that promote or deliver Home Performance with ENERGY STAR by implementing at least one of the following program elements:

- Marketing strategies that increase the use and awareness of Home Performance with ENERGY STAR with demonstrated project-generating results;
- Program delivery approaches that:
 - Produce a high conversion ratio from the home performance assessment to Home Performance with ENERGY STAR project delivery for your participating contractors;
 - Produce verifiable impacts for homeowners, such as greater energy savings, improved safety and comfort, and enhanced building functionality;
 - Are supported and funded by diverse market actors (i.e. multiple utilities, manufacturers, retailers, distributors, etc.) working together to deliver Home Performance with ENERGY STAR.
- Workforce infrastructure development that provides mentoring, training, and recognition; and is supported by a quality assurance process;
- Leadership in the national, regional, state or local arenas to foster partnerships, collaboratives, and advancement of the home performance industry.



Category 3. Certified Products

Programs that are designed to overcome market barriers to widespread adoption of ENERGY STAR certified commercial and residential products and/or related best practices, such as power management of office equipment, consumer education on proper thermostat use, etc.



Category 4. Commercial & Industrial

Programs that deliver improved whole-building energy performance in existing commercial buildings; target and track performance for new construction; and/or achieve facility-wide improvement in industrial plants, by using ENERGY STAR tools and resources to overcome market barriers. The evaluation committee will look for several specific actions, including but not limited to:

- Implementing Building Performance with ENERGY STAR;
- Increasing the use of ENERGY STAR Portfolio Manager by making whole-building energy data more readily available to customers, in particular through use of the Portfolio Manager web services;
- Promoting the National Building Competition, the Challenge for Industry, and earning the ENERGY STAR for buildings; and,
- Setting energy design goals using Target Finder and achieving Designed to Earn the ENERGY STAR for new buildings.



Preparing Your Application

- **Executive Summary**

- Entered through your online MESA account awards application form
- Enter a brief description of your organization and 6-10 bullet points showcasing your organization's ENERGY STAR achievements in the corresponding fields. (See slides 6 - 7 for examples)

- **Narrative**

- No more than three pages per program category
- Address each of the application criteria explicitly in the application.
- New and emerging programs are encouraged to apply, and scores will be weighted accordingly (i.e., more heavily based on program design and anticipated market effects than proven energy and emission savings.)
- Sponsors that provide quantitative results of campaigns and initiatives will be considered more competitively than those who do not provide any quantitative information.



Preparing Your Application

- Narrative (continued)
 - In your application, clearly
 - **Identify all target Program Categories** for your program(s)/initiative(s). If including multiple Program Categories, please ensure that each category addresses the criteria
 - **Describe your program design** in terms of goals, market barriers addressed, strategy for overcoming market barriers, key activities, and discuss why this approach is the best practice for your market. Applicants with new programs/program designs should focus heavily on this section, clearly explaining their program logic and why it is likely to lead to sustained market change.
 - Accomplishments should describe how you've met the criteria
 - Activities listed must be ongoing or completed during calendar year 2017
 - Cumulative accomplishments should include a timeframe (e.g., saved \$3 million in 2017 and more than \$10 million since 2001).



Preparing Your Application

- **New this year**
 - Provide your program implementation budget that is tied to ENERGY STAR in each category.
 - If applicable, please describe any regulatory issues affecting your program.
 - For Certified Homes Programs: Please estimate the number of homes in your service territory during 2017.
 - For Certified Products Programs: in addition to discussing those programs that exclusively promote ENERGY STAR certified products, highlight any programs promoting a subset of ENERGY STAR products, as well as programs that do not exclusively incentivize ENERGY STAR products, if any. For these programs, discuss the market positioning strategy involved, and outline marketing and communications strategies designed to promote ENERGY STAR and minimize consumer confusion. Provide relative percentage breakdowns of each type of incentive.



Application Criteria

- **Incorporation of ENERGY STAR**
 - Describe how you have incorporated the ENERGY STAR platform (i.e., messaging, tools, and strategies) as a central pillar of your initiative.
 - Participation in EPA-led national promotions may be included in this application to the extent they are part of a larger program strategy.
- **Market Effects**
 - Provide qualitative and numerical data to support your case that the market has changed or will likely change in a sustained way as a result of your initiative.
 - To the extent possible, also indicate the size and importance of the market that has been (or will be) affected within the context of your service territory, state, or region.
 - Be sure to review and respond to the **program specific market effects** for your area, as listed in the application.



Application Criteria: Examples of Market Effects

- Energy savings, peak demand reductions, and air pollution reductions achieved through residential, commercial, and/or industrial sector programs that explicitly leverage ENERGY STAR.
- Increase in salesperson/contractor knowledge; change in business practices.
- Increase in participation by key suppliers, including energy service companies, software vendors, financial institutions, trainers, manufacturers, distributors, equipment suppliers, architects, engineers, contractors, or retailers.
- Increase in service availability.
- Increase in third-party advertising by market participants.
- Increase in consumer awareness; change in consumer attitude.
- Breadth and reach of publicity activities.
- Increase in participation in the ENERGY STAR Program.
- Decrease in costs to administer a program through better efficiency and/or streamlining operations.
- Estimated year-to-date energy savings.



Application Criteria: Program Category-Specific Market Effects

Residential New Construction

- Specific program numbers for 2016 and 2017 and the percent change in these numbers from 2016 to 2017 for the following:
 - Number of new homes in the service territory that were ENERGY STAR Certified.
 - Number of builders and Home Energy Raters partnering in the program.
- Description of efforts to engage the local HVAC industry about quality installation and their participation in the ENERGY STAR program.

Home Performance with ENERGY STAR

- Innovative marketing that specifically highlights and leverages the Home Performance with ENERGY STAR platform.
- Innovative solutions to grow Home Performance with ENERGY STAR, such as motivating homeowners to take action, increased recognition for whole house solutions, developing a low-to-moderate income program, offering financing opportunities, diversity and strength of the contractor workforce, and/or economic growth.



Application Criteria: Program Category-Specific Market Effects

Home Performance with ENERGY STAR

- Completed projects by participating contractors.
- Substantiated measurement and verification of performance of improved homes
- Success in coordinating with other organizations (i.e., utilities, manufacturers, state/local governments, retail, finance organizations, non-profits, and trade associations) to grow overall market acceptance of home performance.

ENERGY STAR Certified Products

- Increase in sales or market share of ENERGY STAR certified products—and any tiered subsets, vis a vis non-certified models.
- Increase in shelf space devoted to ENERGY STAR certified products.
- Increase in dealer stocking for certified products.
- Number of older/inefficient units permanently removed from service (e.g., properly recycled).



Application Criteria: Program Category-Specific Market Effects

Commercial & Industrial

- Increase in use of EPA's ENERGY STAR measurement and tracking tool, ENERGY STAR Portfolio Manager, and the Target Finder, for new construction.
- Number of customers obtaining the energy data they need to benchmark in Portfolio Manager through a utility service to enhance data access
- Number of customers participating in the National Building Competition or Challenge for Industry.
- Increase in buildings earning the ENERGY STAR label.
- Number of customer buildings benchmarked and evaluated through a Building Performance with ENERGY STAR program.



Application Criteria

- **Data Sources**
 - Reference data sources used to support your market effect claims. As relevant, briefly (1-2 sentences) describe the data collection method, sample frame, and respondent population (e.g., telephone survey, large-share sample of heating and cooling contractors).
- **Supplemental Materials (optional)**
 - Applicants may submit electronic samples of program materials and evaluation reports to accompany the narrative description. Absent electronic submission of collateral marketing materials, EPA will validate incorporation of the ENERGY STAR label by reviewing use of the ENERGY STAR logo and educational content of the applicant's website. In all cases, EPA reserves the right to consider online resources in reviewing applications.



Testimonials & Quotes Encouraged! But Not Required

- During the online application submission process, applicants will be offered the opportunity to submit brief testimonials and/or quotes that EPA may use to highlight the value and impacts of ENERGY STAR partnership in a personalized manner. These are optional and as such will not be weighted as part of EPA's review process.
- These items are valued by EPA in that they help tell the story of our partners' success with us and we like to feature these types of things in other items (e.g., State Fact Sheets).

Example:

“We have successfully leveraged the resources provided by the ENERGY STAR program to reduce our energy consumption, and thereby reduce our costs. The ENERGY STAR awards are coveted; being judged and evaluated by an official, independent party adds significantly to their prestige.” – Allen Hamblen, President and CEO, CalPortland



Seeking Recognition for Activities that Fall Under More than One Award Category

- Organizations seeking recognition for activities that fall under more than one award category (i.e., Partner of the Year and Excellence in ENERGY STAR Promotion) are strongly encouraged to submit one application that responds to the criteria of both categories.
- To aid in the review and scoring of your submission, it is important that your single application be fully responsive to the criteria set forth in each category.



Guidance on Uploading Your Application

- **Upload your application well in advance of the deadline**
 - Heavy traffic and high upload volumes on the last day before the application deadline can cause the website to become slow. If you plan to submit more than six supplemental files, or one or more files that are larger than six MB, please upload your application well in advance of the deadline.
 - Video files tend to be large and difficult to upload – try to provide hyperlinks to videos posted online (e.g. YouTube, Vimeo).
- **Videos**
 - We generally select about eight two-minute or shorter videos for viewing at the ceremony. The videos should be promotional/commercial in nature, showcasing your ENERGY STAR partnership.





Deadline for Applying

- **A complete electronic application must be uploaded by 8:00 pm, EST on Monday, December 4, 2017.**
 - We will not accept any applications or materials uploaded after this date.
- If you experience problems uploading your application, please notify EPA as soon as possible **before the application deadline and email awards@energystar.gov.**



What to Expect After you Submit

- **Confirmation of Receipt**
 - You will get an e-mail within **48 hours** confirming receipt of materials.
 - It will be sent to the Primary and Communications contacts in the award application.
 - If you do not receive confirmation within this timeframe, email awards@energystar.gov immediately.
- **Notification**
 - You will be notified no later than **Friday, February 16, 2018** about the status of your application.

Recognition

- The Partner of the Year Ceremony will be held Tuesday, May 1, 2018 (subject to change) in Washington, DC.
- Additional recognition during the ceremony will include:
 - The Home Performance with ENERGY STAR Contractor of the Year Award
 - The Excellence Award for Data Innovation
 - The Excellence Award for ENERGY STAR Promotions



Sustained Excellence

- Our highest honor (and different than Excellence Awards), recognizes organizations that have won Partner of the Year for several years and continue to surpass the achievements of previous years.
- There is no separate application for Sustained Excellence.
- The evaluation committee makes this determination.



The Less Fun but **VERY** Important Stuff

- Organizations that are under contract with the EPA are not eligible to receive an award. They may, however, be involved in preparing applications on behalf of clients that partner with ENERGY STAR.
- Each applicant will be screened for any civil and criminal environmental actions. Results of this screening will be factored into the winner selection process.

We encourage all ENERGY STAR partners to apply for the prestigious
Partner of the Year Award!



Applicants for Partner of the Year that do not meet the threshold criteria
for Partner of the Year will be automatically considered for Excellence
Awards.

Recap: Awards Application Timeline and Important Dates

- [2018 ENERGY STAR Awards Applications](http://www.energystar.gov/awards) now available online www.energystar.gov/awards.
- Mid-October 2017 – online system available for formal online applications.
- **Monday, December 4, 2017 – application deadline.**
- Late February 2018 – award determinations complete and applicants notified.
- Friday, May 1, 2018 – annual spring partner meetings & awards ceremony (date subject to change).
- Questions? Partners may contact their account manager or email awards@energystar.gov.

