



2014

Cooperative Advertising Reimbursement Guidelines for Home Performance with **ENERGY STAR® Trade Allies**

Eligibility Rewards of up to \$4,000 per Program Year



focus on energy™

Partnering with Wisconsin utilities

TABLE OF CONTENTS

.....	3
A. Purpose	3
.....	4
A. Trade Ally Eligibility	4
B. Reimbursement Amount	4
C. Miscellaneous	5
.....	6
A. Approval Process	6
B. Reimbursement Process	7
.....	8
A. Graphic Development Resources	8
B. Template Toolkit	9
C. Education & Training Coop Credits	9
D. HPwES eNewsletters	10
E. Approved Messaging	10
.....	11
A. Eligible Tactics	11
B. Ineligible Tactics	16
.....	17
A. Logo Guidelines and Requirements	17
B. Messaging Requirements	27
C. Terminology Specifications	31
.....	33
A. Approval Form	33
B. Reimbursement Form	34

Program:
Home Performance with ENERGY STAR
2821 Dairy Drive, Suite 5
Madison, WI 53718

Program Period:
January 1 – December 31, 2014

Deadline for Reimbursement Requests:
December 1, 2014

Questions:
[HPCoopAdvertising@
focusonenergy.com](mailto:HPCoopAdvertising@focusonenergy.com)
608.729.9100 (phone)
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MM-2111-1213

A. PURPOSE

All marketing and advertising material developed by the Trade Ally that promotes the Home Performance with ENERGY STAR® (HPwES) program either Reward Level 1 or Reward Level 2, must be submitted for approval. Eligible Trade Allies participating in the HPwES (Reward Level 1 or Reward Level 2) program can qualify for funding a portion of their company's HPwES program marketing and advertising costs by following the Cooperative Advertising (Coop) guidelines described in this document. These funds (Coop funds) help Trade Allies promote the HPwES program while building consumer awareness of their services and their participation in the program. Additionally, the Coop program provides several marketing resources to Trade Allies to assist them in marketing the program.

Shared Benefits

For your marketing efforts to qualify for Coop funds the marketing and advertising material must include HPwES branding AND Focus on Energy branding in specified media. There are specific types of marketing and advertising tactics or communication channels that are NOT eligible. There are several reasons why the program is structured this way:

The inclusion of HPwES and Focus on Energy branding ensures that Trade Ally marketing and advertising efforts support the overall marketing goals and objectives of the Focus on Energy HPwES program for consumers to connect the Trade Ally's partnership and participation with Focus on Energy and the HPwES program.

HPwES developed a survey to determine which marketing methods are used and which are the most effective for current HPwES Trade Allies. Based on this research, the program has chosen the marketing and advertising efforts that are most effective and in demand.

A. TRADE ALLY ELIGIBILITY

Focus on Energy HPwES Trade Allies with a partnership status of active and who have completed at least five (5) HPwES projects during the program period (Jan. 1, 2014 - Dec. 1, 2014) are eligible for Coop reimbursement. NOTE: Trade Allies can submit marketing and advertising material at anytime for approval; however, reimbursement will only occur after the Trade Ally has met all eligibility requirements.

Trade Allies that voluntarily leave the HPwES program, do not renew their Trade Ally Enrollment form or are suspended or terminated from the HPwES program are not eligible to receive Coop funds and must immediately remove from circulation all advertisements and materials that use the Focus on Energy Trade Ally or HPwES logos and reference the program. Additionally:

Requests for Coop funds MUST be submitted within 120 days of the invoice date and funds will only be paid if production requirements have been met.

Coop Reimbursement forms must be submitted by December 1st to be eligible for reimbursement during the current program year. If the December 1st date falls on a weekend the reimbursement form must be submitted by the close of business on the next business day.

Any participating Trade Ally with offices out-of-state must use its Wisconsin state address and contact information on all advertising.

Trade Allies with multiple offices within the state of Wisconsin will be considered one company and will only be eligible for the maximum reimbursement amount allowed during the program year.

B. REIMBURSEMENT AMOUNT

Trade Allies with a partnership status of active and have completed at least five (5) HPwES projects during the eligibility period, are eligible for Coop reimbursement funds.

Trade Allies are eligible to receive \$40 per HPwES completed project up to \$4,000 per program year to use towards advertising or promotion of the program. For a project to be considered completed the project must be submitted by Focus on Energy for Trade Ally payment. If more than one Focus on Energy program is promoted in the advertisement, only one program reimbursement request can be made.

If the Trade Ally has earned Coop funds, the program will reimburse up to 50 percent of the eligible cost of the approved marketing material. If the requested reimbursement amount is greater than the eligible funds available, only the available amount will be reimbursed.

Coop funds are limited during a program calendar year and are available on a first-come, first-served basis. Coop funds will NOT be reimbursed until the Focus on Energy Trade Ally Participation form AND the HPwES Trade Ally Enrollment form with supporting documentation are submitted to Focus on Energy for the current program year or when requested, in the case of mid-year program revisions.

C. MISCELLANEOUS

Listed below are additional program information, exceptions and exclusions:

All advertisements submitted for Coop funds must include the name of the company listed in the HPwES Trade Ally Enrollment form and promote the HPwES program as a component of your business offering in text, graphic and logos as required by the marketing tactics Minimum Creative Requirements (see Section VI).

Coop funds will not be provided if the material, as determined by Focus on Energy is inconsistent with Focus on Energy's message, or compromises the logo, service mark, or programs of Focus on Energy, Home Performance with ENERGY STAR or the United States Department of Energy (US DOE). Program disciplinary action may be taken if any materials are determined to be offensive, inconsistent with Focus on Energy's message or compromises the program or any program element in any way. In instances where HPwES content is only a portion of the material in the piece, Focus on Energy may decline to consider the piece for pro-rate Coop funds if the surrounding material is deemed inappropriate or not in support or promotion of the Focus on Energy HPwES program.

Marketing and advertising material will not be approved and Coop funds will NOT be reimbursed if the material contains a claim, exaggeration, or representation about a business or its services that is not substantiated or supported by factual or other objective criteria such as third-party review.

Coop funds are available on a first come, first-served basis and are based on program budget availability. Focus on Energy reserves the right to discontinue or modify the program at any time, without notice.

**Items to submit for Approval
of Marketing Material**



Approval Form



**Draft of
marketing material**

A. APPROVAL PROCESS

Trade Allies must submit all marketing and advertising material that promotes the Focus on Energy HPwES program or its rewards for review and approval **BEFORE** the Trade Ally can publish the advertisement or use the material. This approval process is required regardless if the Trade Ally is requesting Coop fund reimbursement or not. To receive marketing material **APPROVAL**, please read and follow the steps below.

Step 1: Develop or design the marketing and advertising material referring to Section VI for guidelines. All material submitted for Coop funds must include the name of the company listed in the HPwES Trade Ally Enrollment form and meet the Minimum Creative Requirement for that marketing and advertising tactic.


Step 2: Trade Ally must complete the *Cooperative Advertising Approval* form and send it along with a draft copy of the marketing and advertising material to the address listed on the form. Third-party vendors may not submit approval forms on behalf of a participating Trade Ally.

Step 3: The Cooperative Advertising Coordinator will contact the Trade Ally within five (5) business days with **APPROVAL** or requested edits. If edits are requested, the Trade Ally must resubmit the revised marketing material for final approval.

Step 4: After receiving final **APPROVAL**, the Trade Ally may place the advertisement or begin using the material. Marketing and advertising material published without prior approval is not acceptable and will NOT be reimbursed.

If the marketing and advertising material is approved and will be published in multiple publications or multiple times, it does NOT need re-approval before each run. However, materials must be resubmitted for approval the beginning of each calendar year, and whenever a change is made to the material, or whenever a change is made to the HPwES Coop Advertising Reimbursement guidelines. If you have any questions about the process or guidelines, please contact your Regional Manager or email us at HPCoopAdvertising@focusonenergy.com.

**Items to submit for
Reimbursement**




**Reimbursement
Form**



Invoice



Proof of Payment



**Scan/photo/copy
of finished ad**

B. REIMBURSEMENT PROCESS

To be eligible for Coop funds, the Trade Ally must meet all the requirements listed in the *Eligibility Section* above and the marketing and advertising material must have received program final approval **BEFORE** publishing or using the material. Marketing and advertising material published without prior approval will **NOT** be reimbursed.

To request **REIMBURSEMENT** for preapproved marketing material, please read and follow the steps below.

Step 1: Trade Ally must complete the *Cooperative Advertising Reimbursement* form and a copy of the completed marketing and advertising material, a copy of the paid invoice and proof of payment such as a cancelled check, credit card statement, etc. to the address listed on the form. **Make sure to black out all sensitive financial information on the documentation.** A Paid Invoice supplied by the vendor is also acceptable as Proof of Payment. The document must show Vendor name, detailed charges, and billing to the Trade Ally requesting reimbursement. Reimbursement requests must be submitted NO LATER THAN 120 days after invoicing. Third-party vendors may not submit forms on behalf of a partnering Trade Ally.

Step 2: The Cooperative Advertising Coordinator will contact the Trade Ally within five (5) business days with reimbursement approval or request for additional information.

Step 3: After receiving approval for a **REIMBURSEMENT** request, the eligible amount will be processed. Checks are processed twice a month, on the 10th and 28th of the month. Please allow up to 6-8 weeks to receive the reimbursement check. Checks will be mailed to the Trade Ally's address on record. Focus on Energy is not responsible for misdirected or undeliverable mail.

All reimbursement requests must be received by **December 1st** to be included in the current program period. Funds are available on a first-come, first-served basis and are based on program budget availability. Focus on Energy reserves the right to discontinue or modify the program at any time, without notice. If you have any questions about the process or guidelines, please contact your Regional Manager or email us at HPCoopAdvertising@focusonenergy.com.

In addition to financial assistance, the HPwES Coop program offers tools and resources to partnering Trade Allies to help manage and encourage their participation in the program. These resources include:

A. Graphic Development Resources

Please see the below descriptions of graphic development contacts who have an understanding of HPwES Coop logo and messaging requirements. Focus on Energy has no contract or monetary agreement with these contacts and Trade Allies are under no obligation to work with any specific graphic development team. These contacts have all the resources needed to develop HPwES Coop-ready marketing material (logos, Guidelines and templates), and are available to work with Focus on Energy HPwES Trade Allies.

Trade Allies will pay graphics teams directly for any work done and must submit draft artwork for final Coop approval before advertising, as with any other marketing material.

Econoprint

Econoprint is an award winning printing company that offers a variety of services including printing, copying and finishing services; large format banners, posters, signs and trade show graphics; an award winning creative design team; and a full service mailing house. www.epdigital.com



Powderkeg

Powderkeg is an award winning web design firm that specializes in the design and development of effective web sites, email campaigns and offers consultation and tactics related to SEO (search engine optimization) and social media to help our customer sites rank high in the search engines. www.powderkegwebdesign.com



Denise Helmer

Direct: 608-664-3412

Email: deniseh@msn.econoprint.com

Lynnergy Consulting

Lynn Belken, owner of Lynnergy Consulting, is a social media and marketing adviser with more than 12 years of experience directing successful marketing and media initiatives within the energy efficiency industry for both B-to-C and B-to-B environments. At WPPI Energy, Lynn developed a robust toolbox of over 200 marketing materials for members. In her previous roles with the Wisconsin Energy Conservation Corporation (WECC), she developed Focus on Energy's successful online and social media strategies, and implemented marketing plans to increase consumer awareness and persuade purchase of energy-efficient products. The services she provides for clients include social media campaigns, in-store, online, and traditional advertising, and integrated marketing strategy. Past programs led by Lynn have received national recognition in the Wall Street Journal, by the US Environmental Protection Agency, and the Association of Energy Services Professionals.



Lynn Belken

Web: www.lynnenergyconsulting.com

Email: lblken@lynnenergyconsulting.com

B. Template Toolkit

Templates of various marketing materials are available for you to use in marketing your company and the HPwES program. Simply insert your company logo, images and the appropriate messaging. The logo requirements are already in place. Note: approval is still required on the final draft of the artwork before printing/publication.

C. Education & Training – Coop Credits

Focus on Energy believes that continued education and training is important to the success of the program. Trade Allies participating in the HPwES program will receive invitations to attend special trainings or access the latest research, tools, ideas and tips to improve their program knowledge and building science and marketing/sales skills.

Some of these training opportunities involve a cost to participate; Focus on Energy would like to reward these types of opportunities by issuing a credit to your company's eligible Coop balance for qualifying training events. Please look for the eligible Coop credit amount to be posted with the training advertisement.

D. HPwES eNewsletters

Keep an eye on the HPwES eNewsletters for any updates or tips regarding Cooperative Advertising tools.

If you work on Coop ads for your company and do not receive the newsletters, please contact

HPCoopAdvertising@focusonenergy.com to join the mailing list.

E. Approved Messaging

Focus on Energy appended demographic and behavioral data to past HPwES customers across the state. Based on this research, the program has developed HPwES program messaging that is more likely to motivate homeowners and, more importantly, understand Home Performance program features and benefits. Trade Allies are encouraged to use this messaging on your website, in advertising material, or anywhere else you would like to promote the program. Repetition of consistent messaging builds recollection of the program and increasing participation in the program; the more we can collectively educate our target audiences, the easier it will be to help save energy and money for homeowners across the state. For a list of approved messaging see Section VI.

A. ELIGIBLE TACTICS

The following tactics **ARE** eligible for Coop reimbursement:

Marketing and Advertising Tactic	Reimbursement Detail	Minimum Creative Requirements
Direct Mail	<p>Cost of production (printing only). Graphic design, copy writing and postage costs are not available for reimbursement.</p> <p>Pro-Rate Option: If only a portion of your direct mail material promotes the HPwES program, Focus on Energy will evaluate the content and offer a percentage payment based on the amount of content dedicated to HPwES.</p>	<p>Standard Postcard 4.5" x 6" to 5" x 7". Short messaging. HPwES logo and Focus on Energy/Trade Ally mark logo required.</p> <p>Oversize Postcard Larger than 5" x 7". Short messaging. HPwES logo and Focus on Energy/Trade Ally mark logo required.</p> <p>Multiple Page Mailer Longer messaging, HPwES logo, and Focus on Energy/Trade Ally mark logo required.</p>
Print Advertising and Inserts (Magazine, Newspaper, Tabloid)	<p>Media placement costs. Graphic design, copy writing and postage costs are not available for reimbursement.</p>	<p>Full Page Ads Medium messaging HPwES logo and Focus on Energy/Trade Ally mark logo required.</p> <p>Half Page Ads Short messaging. HPwES logo and Focus on Energy/Trade Ally mark logo required.</p> <p>Quarter Page Ads (Newspaper only) Short messaging. HPwES logo and Focus on Energy/Trade Ally mark logo required.</p>

2014 Pre-approved Trade Shows

Northeast Region

BCHBA Home Expo
Answers to Energy Eco Expo
WBAY Home & Garden Show

Southeast Region

MBA Home Building and
Remodeling Show
Milwaukee NARI Home
Improvement Show

Southwest Region

Madison NARI Remodeling Expo
Madison Home Expo
MABA Dream Home Showcase
SCWBA Home Show

Northwest Region

CVHBA Home and Garden Show
La Crosse Home and Builders Show
SCVHBA Home, Remodeling
& Garden Show
HNBA Home Show
WWIS Radio Home Show

Marketing and Advertising Tactic	Reimbursement Detail	Minimum Creative Requirements
Pay-Per-Click Search and other Social Media Ads	Media placement costs. Graphic design and copy writing costs are not available for reimbursement.	Pay-Per-Click and other Social Media Ads HPwES logo and Focus on Energy/Trade Ally mark logo required.
Online (Web) Banner Advertising	Media placement costs. Graphic design, copy writing and postage costs are not available for reimbursement.	Banner Ads HPwES logo.
<p>Home Shows Trade show/event that attracts a homeowner audience of greater than 100</p> <p>Focus on Energy has compiled a list of pre-approved Home Shows, as shown to the left. If your company attends a show on this list, you do not need to submit for approval – simply complete a reimbursement form and attach the required documents.</p> <p>NOTE: You are still encouraged to attend shows not on the pre-approved list; however, for any show not on the list, you will need to submit for approval prior to requesting reimbursement.</p>	<p>Cost of participation (fee to have space at the event), production of signage that meets Minimum Creative Requirements.</p> <p>NOTE: Trade Ally must be registered under their own company name. A photo of the event booth must be submitted for reimbursement.</p> <p>Pro-Rate Option: If only a portion of your home show signage promotes the HPwES program, Focus on Energy will evaluate the content and offer a percentage payment for production of signage and cost of participation based on the amount of content dedicated to HPwES.</p>	<p>Signage – Pull Up Banners Short messaging. HPwES logo and Focus on Energy/Trade Ally mark logo required.</p> <p>Signage – Booth Poster/Signage At minimum – 1 poster/sign measuring at least 11x17 inches, with below requirements Medium messaging. HPwES logo and Focus on Energy/Trade Ally mark logo required.</p> <p>In order to be eligible for home show reimbursement, signage in your booth must have received approval for the current program period. Please see Additional Resources (p. 8) for more information on templates and graphic design resources.</p>

Marketing and Advertising Tactic	Reimbursement Detail	Minimum Creative Requirements
Television Advertising	Media placement costs. Graphic design and copy writing costs are not available for reimbursement.	<p>Spots 60-Second Spot. Short messaging. HPwES logo and Focus on Energy/Trade Ally mark logo required for minimum 5 seconds.</p> <p>Less than 60-Second Spot. HPwES logo and Focus on Energy/Trade Ally mark logo required for minimum 5 seconds.</p>
Radio Advertising	Media placement costs for minimum 30-second spots.	<p>Spots Short messaging.</p>
Vehicle Signage	<p>Production cost. Graphic design and copy writing are not available for reimbursement.</p> <p>Pro-Rate Option: If only a portion of the vehicle signage promotes the HPwES program, Focus on Energy will evaluate the content and offer a percentage payment based on the amount of content dedicated to HPwES.</p>	<p>Whole Vehicle Wraps HPwES logo and Focus on Energy/Trade Ally mark logo required on each side of the vehicle.</p> <p>Magnetic/Decal Sign HPwES logo and Focus on Energy/Trade Ally mark logo required.</p>

Marketing and Advertising Tactic	Reimbursement Detail	Minimum Creative Requirements
Billboard Advertising & Sponsorship Signage	Media placement costs and production cost. Graphic design and copy writing are not available for reimbursement.	Bill Board Advertising/ Sponsorship Signage Short messaging. HPwES logo and Focus on Energy/ Trade Ally mark logo required.
Collateral Materials	Cost of production. Graphic design and copy writing costs are not available for reimbursement.	Flyer (single-sheet) Medium messaging HPwES logo and Focus on Energy/ Trade Ally mark logo required. Insert/Bucksip/Bill Statement Medium messaging. HPwES logo and Focus on Energy/ Trade Ally mark logo required. Brochure Long messaging. HPwES logo and Focus on Energy/ Trade Ally mark logo required.
Lawn Signs	Cost of production. Graphic design and copy writing costs are not available for reimbursement.	One or Two-Sided HPwES logo and Focus on Energy/ Trade Ally mark logo required.
Referral Cards	Cost of production. Graphic design and copy writing costs are not available for reimbursement.	One or Two-Sided HPwES logo and Focus on Energy/ Trade Ally mark logo required.
Phone Book Ads	Media placement costs. Cost of production. Graphic design and copy writing costs are not available for reimbursement.	Short messaging. HPwES logo and Focus on Energy/ Trade Ally mark logo required.

Other Tactics

Focus on Energy is always looking to improve the effectiveness of the program's marketing and advertising. We encourage Trade Allies to submit ideas for an advertising or marketing activity that is not listed above. Please allow 10 business days for review of marketing activities not otherwise noted in these guidelines.

Submission of ideas for Coop reimbursement for other activities must include the following information:

Objective for the activity (e.g. generate new customer leads) and how it helps accomplish the primary Coop program objective:

Building awareness of HPwES and eligible energy efficiency project to increase HPwES project volume.

Detailed list of all activities, to include:

Quantities for printed materials and detail on recipients (i.e. mailing list of homeowners, home show database, etc.)

Circulation/impressions/distribution for advertising materials

Dates of activity

Cost per activity

B. INELIGIBLE MARKETING AND ADVERTISING TACTICS

The following tactics are **NOT** eligible for Coop fund reimbursement:

Marketing and Advertising Tactic	Reason for Ineligibility
Email Blasts	Focus on Energy cannot responsibly provide Coop funding for content that can be easily changed and distributed. The program highly recommends, but does not require, partnering Trade Allies to include the Focus on Energy logo, Trade Ally mark, and HPwES logo and messaging in their email content to connect the Trade Ally's partnership and participation with Focus on Energy and the HPwES program. Trade Ally's email links should directly link to the Focus on Energy Home Performance page(s) – www.focusonenergy.com/homeperformance
Direct Mail Postage	Trade Ally expense.
Graphic Design or Copy Writing	Trade Ally expense.
Trade Ally Website Development, Hosting or Content/Page maintenance	Focus on Energy cannot responsibly provide Coop funding for content that can be easily changed. <i>The program highly recommends, but does not require, partnering Trade Allies to submit copy for review to ensure information is accurate and to include the Focus on Energy logos, Trade Ally mark and HPwES logo and messaging on their websites to connect the Trade Ally's partnership and participation with Focus on Energy and the HPwES program. Trade Ally's website should directly link to the Focus on Energy Home Performance page(s) – www.focusonenergy.com/homeperformance</i>
Any items that cannot accommodate Minimum Creative Element Requirement guidelines or are typical expenses for operating a business (i.e not marketing and advertising expenses)	Examples: small refrigerator magnets, 15-second radio spots, uniforms, apparel, business cards. NOTE: The Focus on Energy logo and Trade Ally mark should not be used on business cards. Please submit artwork for review and feedback if you would like to reference the program.

Product Advertisements

Logos in the Coop lockups may NOT be used to endorse any specific makes or models of products.

A. LOGO GUIDELINES AND REQUIREMENTS

This guide also provides requirements and creative application samples for Trade Allies to reference as they develop their marketing and advertising materials. These samples are not intended to change your company's branding or messaging; they simply provide examples of acceptable methods of incorporating required logos and acceptable messaging.

Logo Lockups

Marketing tactics indicated in Section V must have the HPwES logo, and Focus on Energy/Trade Ally mark logo to be eligible for Coop reimbursement.

To assist you in complying with the minimum logo size requirements, we are providing logo lockup files (for color and black and white). We have designated two lockups (one horizontal and one vertical) as the preferred logo lockups/orientations, but also display alternative lockups to accommodate spacing needs in your ads; the files are available by emailing us at HPCoopAdvertising@focusonenergy.com. These logo lockups should remove any guesswork as to correct size and proportion when developing creative. The lockups are available in vector format (.eps) so that you can proportionally increase the logo size for formats larger than 8.5" x 11". The logo lockups are also provided as .jpg files.

Color logos are preferred against a white background, black and white versions may be used against colored backgrounds. Black logos are preferred for black and white printing.

Dated vs. Non-dated Logos

Dated logo lockups with the Trade Ally mark (showing the program year) are to be used on all marketing materials in circulation during the specified year. Non-dated logo lockups are available upon request for use on marketing materials which will remain in market beyond the end of the calendar year and which are not renewed annually. Examples of these types of marketing materials are vehicle wraps, yard signs and certain event materials. YOU MUST RECEIVE PRIOR APPROVAL TO USE A NON-DATED LOGO.

**Note on Logo Sizing
(details p. 22)**

**The HPwES Coop logo lockup
must be noticeably smaller than
your company's logo.**

- For small format marketing material, maintain the minimum logo size requirements shown on page 22.
- For larger format marketing material (that which can accommodate logos bigger than the minimum size required), the HPwES Coop lockup should be at least half the size of (or 50% smaller than) the Trade Ally company logo.

Other Logo Guidelines

Follow these additional logo guidelines to avoid confusion in the marketplace:

The ENERGY STAR marks or logo should NEVER be combined or displayed together with the Home Performance with ENERGY STAR logo. For example, if an HPwES Trade Ally also sells ENERGY STAR qualified windows, the participant should choose to display either the certification mark next to the qualified window or the Home Performance with ENERGY STAR logo to advertise their participation, but NOT both.

Regardless of whether the marketing materials will be submitted for Coop reimbursement, when using the Home Performance with ENERGY STAR registered trademark or logo or ENERGY STAR registered trademark in ANY advertising, it must always comply with the national ENERGY STAR identity guidelines, visit energystar.gov for more information. For example: Use the ® at the first mention of ENERGY STAR in a document. Make sure the ® is superscripted, i.e., Home Performance with ENERGY STAR® and always type ENERGY STAR in all capital letters.

The use of the United States Department of Energy (US DOE) logo is **prohibited**. Trade Allies may not express or imply that Focus on Energy, US DOE, ENERGY STAR®, Home Performance with ENERGY STAR, participating utility companies or the Program Implementer endorses, certifies, accredits, verifies or approves your company and/or subcontractor(s) and the associated products and /or services, to specific organizations and **CANNOT** be used by Trade Allies participating in the Home Performance with ENERGY STAR program.

Alterations, substitutions or modifications of the Focus on Energy Trade Ally Logo and the HPwES logo are NOT allowed.

Logo Sheet for HPwES and Focus on Energy/Trade Ally mark – Horizontal Lockups

Horizontal 1: Preferred



This all-in-one logo sheet illustrates the vector and jpg art for horizontal lockups that can be accessed by emailing us at HPCoopAdvertising@focusonenergy.com

If the space in your marketing material cannot accommodate the preferred horizontal logo lockup, please request an alternate lockup (also available in black or white).

Color logos are preferred against a white background, black and white versions may be used against colored backgrounds. Black logos are preferred when printing black/white.



Horizontal 2

Horizontal 3



Horizontal 4

Logo Sheet for HPwES and Focus on Energy/Trade Ally mark – Vertical Lockups

Vertical 1: Preferred



This all-in-one logo sheet illustrates the vector or jpg art for vertical lockups that can be accessed by emailing us at HPCoopAdvertising@focusonenergy.com

If the space in your marketing material cannot accommodate the preferred vertical logo lockup, please request an alternate lockup (also available in black or white).

Color logos are preferred against a white background, black and white versions may be used against colored backgrounds. Black logos are preferred when printing black/white.



Vertical 2



Vertical 3

Incorrect Logo Usage

Never condense or stretch the logos.



Never alter the size relationship between any part of the logos.



Never alter the space relationship between any part of the logos.



Never change the font of the logos.



Never change order of logos.



Never place the logo over a photo, illustration or graphic or enclose in a shape or place border around the logo.



Logo Sizing:

Coop Lockup vs. TA Company Logo

When space allows, the HPwES Coop logo lockup must be noticeably smaller than your company's logo.

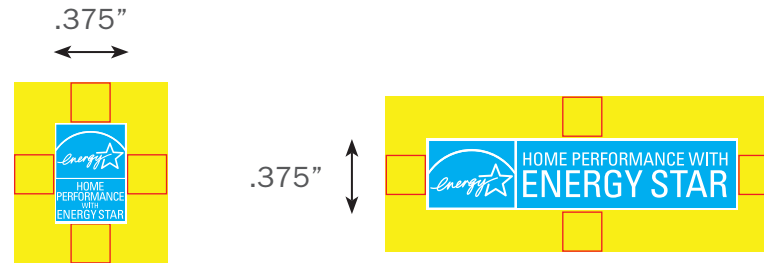
- For small format marketing material (ie. most Phone book ads), maintain the minimum logo size requirements shown here.
- For any larger format marketing material (ie. that which allows for logo sizes larger than the minimum), the HPwES Coop lockup should be at least half the size of (or 50% smaller than) the Trade Ally company logo.

Logo Files

Logo lockup files are available in three formats:

- JPEG (small) – for web use (DO NOT RESIZE)
- JPEG (standard) – files should be used at their as-is sizing; DO NOT RESIZE the logo lockup after downloading the file.
- EPS – can be expanded for larger format marketing materials without compromising resolution

Logo Requirements – Minimum Sizing for Printed Materials



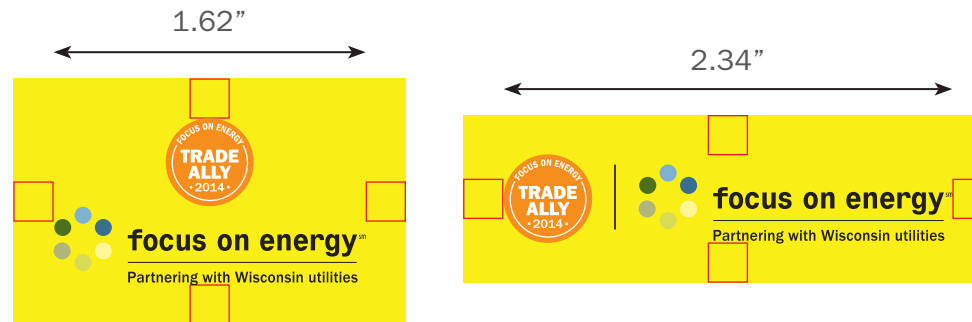
Home Performance with Energy Star:

The minimum length of the shortest side = 3/8 (.375) inches for print.

Clear Space

(Yellow Field) .21"

No other graphic elements, such as text and images (except background imagery) can violate the clear space area.



Focus on Energy/Trade Ally mark logo:

Logo can be no smaller than 1.62 inches in width (vertical) and no smaller than 2.34 inches in width (horizontal).

Clear Space

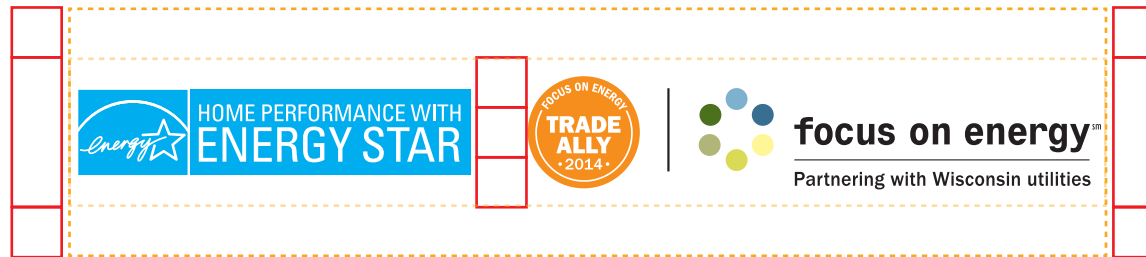
(Yellow Field) .21"

No other graphic elements, such as text and images (except background imagery) can violate the clear space area.

Logo Requirements — Printed Material (Larger Formats)

For printed pieces large enough to accommodate logos bigger than the minimum sizing required (p. 22), the logo lockup files must be sized proportionally to the Trade Ally’s company logo. **The HPwES Coop logo lockup (shown below) should be at least half the size of (or 50% smaller than) the Trade Ally company logo.**

Clear space around logos must be equal to 1/3rd (.333) of the height of the Home Performance with ENERGY STAR and Focus on Energy/Trade Ally mark around all dimensions of the logo. See the Quick Guide Template for a sample; the clear space must grow in proportion to the logo lockup size on large scale pieces.



See the next page for acceptable logo proportions on large scale pieces.

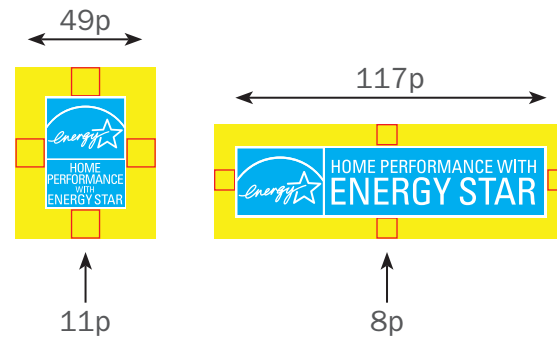
Logo Lockup Guide For Larger Applications

The HPwES Coop logo lockup should be at least half the size of (or 50% smaller than) the Trade Ally company logo. Please maintain the clear space requirements around the lockup as shown in previous applications.

NOTE: The marketing examples on this page (vehicle wraps and yard signs) may be approved for use of the non-dated logo lockup. Please email HPCoopAdvertising@focusonenergy.com to request approval before using the non-dated logos and to receive the lockup files.



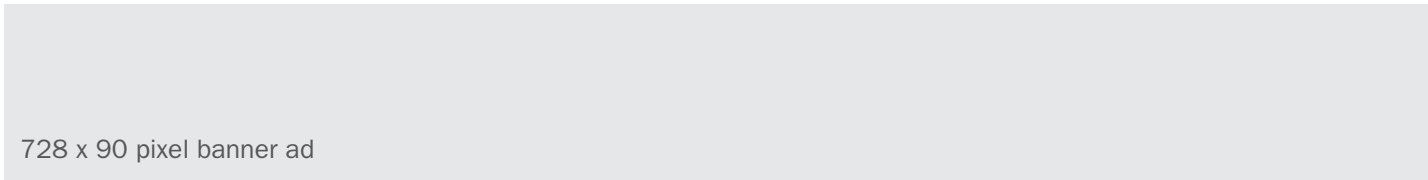
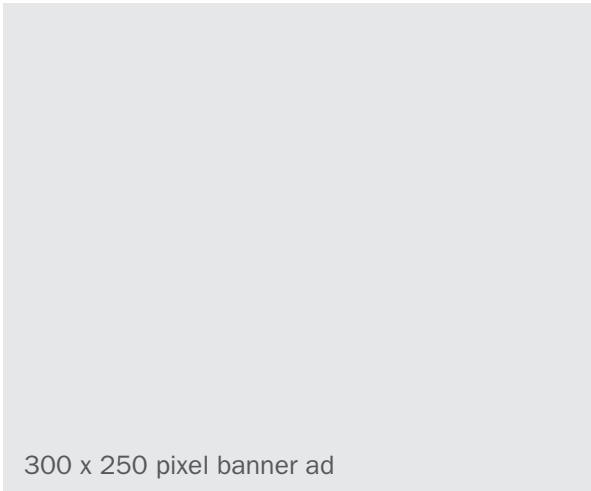
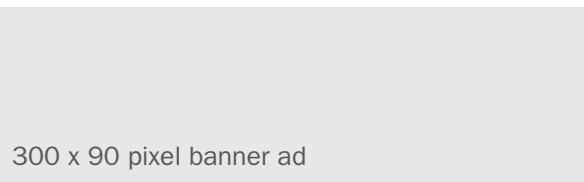
Logo Requirements — HPwES Banner Advertising



CLEAR SPACE (YELLOW FIELD) No other graphic elements, such as text and images (except background imagery) can violate the clear space area.

Web Banner Ads:

Only the HPwES logo (used vertically or horizontally) is required for banner advertising. The logo and required clear space on four sides are shown at the minimum allowable size. It may be placed anywhere within the banner ad.



Logo Requirements — Broadcast & Multimedia

For broadcast or multimedia (television, video, etc.) the logos can be located anywhere on the piece, but must remain on the screen for a minimum of 5 seconds. Accompanying copy line (short messaging) can be included on the title frame or it can be read by an on-camera talent or voiceover.

Trade Allies are encouraged to use the balance of the space on the title frame for their company logo, images or messaging.

The logo lockup should appear for a minimum of 5 seconds. The supporting copy line may be presented graphically as shown, OR delivered through voice over.

High Def (1280 x 720)



Standard Def (720 x 486)



B. MESSAGING REQUIREMENTS

The majority of marketing and advertising material submitted for Coop funding must contain Focus on Energy HPwES messaging. The amount and nature of this messaging depends on size (for print) or length (TV, radio, multimedia). Exact requirements are listed by marketing activity in Section V. In print advertisements or collateral, program messaging must be equal in size to the body or on-screen text in the rest of the advertisement. For TV or multimedia, follow the broadcast guidelines/templates. Approved messaging use in marketing pieces is on subsequent pages in that section. There are choices for each option except for the extra-short messaging.

Additionally, Trade Allies can create their own messaging and submit it for approval. Follow these guidelines when creating optional messaging:

Messaging must be similar in length to the pre-approved messaging options (long, medium, short or extra-short).

Messaging must include the Home Performance with ENERGY STAR program name, except when extra-short messaging is the requirement.

Messaging must include at least one key program benefit: increase comfort, improve your home's comfort, energy savings, reduce energy costs, save money, comprehensive/whole-house approach, health, home energy assessment, energy assessment, etc.

NOTE: Please allow up to 14 business days for review of optional messaging. Refer to Section 5 to see which marketing tactics require each level of messaging to be eligible for Coop.

Long Messaging:

Option 1:

[Insert Trade Ally company name] is proud to partner with Focus on Energy's Home Performance with ENERGY STAR® Program. Home Performance with ENERGY STAR, administered in Wisconsin by Focus on Energy, offers a comprehensive energy assessment and whole-house approach to improving the energy efficiency and comfort of your home.

Rather than focusing on a single problem, like not enough insulation in the attic or leaky windows, Home Performance with ENERGY STAR looks at how energy-saving improvements throughout your home can work together to give you better results and a more comfortable home.

Benefits of Home Performance with ENERGY STAR:

Save up to 30% on your utility bills

Fewer drafts and more comfortable rooms

Performance testing performed by a BPI-Certified Trade Ally

Detailed report outlining recommendations

Attractive instant discounts – no customer paperwork

Third-party quality assurance and quality control to ensure work gets done correctly

FREE energy-saving products and installation (a \$100 value)

Learn more about Focus on Energy's Home Performance with ENERGY STAR program at focusonenergy.com/homeperformance or [insert Trade Ally website address here]

Option 2:

Problem solving.
Increased comfort.
Energy efficiency.
Instant discounts.

There is more than one reason to contact [Insert Trade Ally company name], a partner with Focus on Energy's Home Performance with ENERGY STAR®.

Home Performance with ENERGY STAR provides you:

A comprehensive home energy assessment to identify problems such as air leaks, drafts, ice dams, and mold and moisture issues in your home

A detailed report outlining the findings and recommended solutions

Follow-up testing to ensure the improvements are complete and effective

Instant discounts of up to \$2,000 off of eligible energy-saving improvements

FREE energy-savings products and installation (a \$100 value)

To learn more about Focus on Energy's Home Performance with ENERGY STAR Program, visit focusonenergy.com/homeperformance or [insert Trade Ally website address here]

Medium-Length Messaging:

Option 1:

If you're considering making improvements to your home to lower energy bills or fix comfort problems, contact [insert Trade Ally company name] to learn about Home Performance with ENERGY STAR® — a comprehensive, whole house approach to improving energy efficiency and comfort in your home. Instant discounts are available for making eligible energy-saving improvements. Ask us about how you can receive FREE energy-saving products.

Option 2:

Experiencing leaky doors and windows, fluctuating temperatures, cold drafts, ice dams and mold and moisture issues in your home? Schedule an energy assessment today to solve your home comfort problems, reduce your energy usage, and save up to 30% on your utility bills. [insert Trade Ally company name] is a partner with Focus on Energy's Home Performance with ENERGY STAR® Program. Instant discounts are available for making air sealing and insulation improvements. Ask us about how you can receive FREE energy-saving products.

Short Messaging:

Options:

Proud to partner with Focus on Energy's Home Performance with ENERGY STAR® Program

[Company Name] is a registered Trade Ally of Focus on Energy's Home Performance with ENERGY STAR® Program

We are a registered Trade Ally of Focus on Energy's Home Performance with ENERGY STAR® Program

Extra-Short Messaging:

NOTE: Extra-short messaging must be used in close proximity to HPwES and Focus on Energy logos and only in designated marketing tactics.

If you are extremely limited on space in your ad, please try to incorporate messaging using the example below

PROUD TO PARTNER WITH:



C. TERMINOLOGY SPECIFICATIONS

The terminology listed below is NOT a substitute for Minimum Creative Requirements, it is simply provided to serve as a guide in creating your own messaging.

Acceptable Terminology	Unacceptable Terminology
Participating (or partnering) Trade Ally in the Home Performance with ENERGY STAR® Program	Home Performance with ENERGY STAR contractor.
BPI Credited Trade Ally BPI-Certified Trade Ally	BPI Accredited Trade Ally.
Home Performance Trade Ally Home Performance with ENERGY STAR® Trade Ally	ENERGY STAR Trade Ally (or contractor). Do not: Imply that your company is ENERGY STAR, EPA, DOE, Focus on Energy, participating utility company sponsored, or BPI accredited, verified, endorsed or approved.
Energy Assessment Home Energy Assessment Comprehensive Home Assessment Comprehensive Home Energy Assessment Comprehensive Assessment of your home Comprehensive Energy Assessment of your home Whole-House Assessment FREE Energy Assessment (HPwES Reward Level 2 only)	Audit. Consultation.

Acceptable Terminology	Unacceptable Terminology
<p>Save up to 30% Reduce your energy use by up to 30%</p>	<p>Exact percentages unless in a testimonial.</p>
<p>Instant Discount: HPwES Reward Level 1: 33.3% up to \$1,250 HPwES Reward Level 2: 75% up to \$2,000 if energy use reduction is 10% or greater Savings-Bonus: HPwES Reward Level 1: \$250 if energy use reduction is 25% or greater Reward (Instant Discount Reward Amounts + Savings-Bonus Amount)</p>	<p>Incentives. Rebates. Grants. Subsidies. Cash back. Cash back incentives. Cash incentives.</p>

Additional specifications: Use the ® at the first mention of ENERGY STAR in a document. Make sure the ® is superscripted, i.e., Home Performance with ENERGY STAR® and always type ENERGY STAR in all capital letters.


A. COOPERATIVE MARKETING-APPROVAL FORM

Helpful Tips and Information:



All marketing and advertising material developed by the Trade Ally that promotes the HPwES program or its rewards must be submitted for approval. You do not have to have five (5) completed projects to request marketing and advertising material approval.

Submit this form along with a draft copy of the marketing material to: HPCoopAdvertising@focusonenergy.com.

You'll be contacted within five (5) business days with approval or requested edits.



AD APPROVAL FORM
COOPERATIVE ADVERTISING REIMBURSEMENT PROGRAM
For Eligible HPwES Trade Allies
Program Period January 1 - December 31, 2014
Program Deadline: December 1, 2014

Partnering with Wisconsin utilities

SECTION 1: TRADE ALLY COMPANY INFORMATION (Third-party vendors may not submit forms on behalf of a participating Trade Ally).

Company Name		Contact Name	
Mailing Address		City	State Zip
Phone Number		Email Address	

STEP ONE: AD APPROVAL PROCESS

Note: All ads/marketing materials must be approved **BEFORE** publishing or use.

Fill in chart below (**Ad/Marketing Tactic Information**)

Submit this form and a draft of your ad/marketing materials for approval (see contact info at the bottom of this page).

Address any changes and receive Ad Approval

(STEP TWO: REIMBURSEMENT REQUEST PROCESS)

SECTION 2: AD/MARKETING TACTIC INFORMATION (All advertising material developed by the Trade Ally that promotes the HPwES program or its rewards must be submitted for approval before placement).

Marketing/Advertising Tactic (print, radio, etc.)	Advertiser/Vendor Name	Run Date(s)	Estimated Cost	Coop Percentage Amount	Estimated Reimbursement Amount
			\$	50%	\$
			\$	50%	\$
			\$	50%	\$
			\$	50%	\$
			\$	50%	\$
TOTALS			\$	50%	\$

Focus on Energy Home Performance with ENERGY STAR Program does not partner with or endorse any specific media outlets. Signature signifies understanding and compliance with Cooperative Advertising & Reimbursement Guidelines. Advertisements cannot say or imply Focus on Energy endorses, approves, or warrants the Trade Ally, the Trade Ally's products, or the Trade Ally's work. Funds are available on a first-come, first-served basis and are based on program budget availability. Focus on Energy reserves the right to end or modify this program at any time, without notice.

Trade Ally Signature _____ Date _____

OFFICE USE ONLY: REVIEW INFORMATION

Approved (Approval for all advertisements expire at the end of the calendar year. Please resubmit continuous ads in the beginning of each year and whenever a change is made to the ad template)

Denied: Reason(s) _____

Number of Projects Completed	Coop Used	Coop Balance
Authorized Representative	Date	

Form Submittal - Return signed, completed form to:
Mail: Focus on Energy Cooperative Advertising, 2821 Dairy Drive, Suite 5, Madison, WI 53718
Email: HPCoopAdvertising@focusonenergy.com; **Fax:** 608.222.2923
Questions: 608.729.9100

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Helpful Tips and Information:

Only Trade Allies with a program status of active and who have completed at least five (5) HPwES projects during the eligibility period, can submit marketing and advertising material for Coop reimbursement.

Trade Allies are eligible to receive \$40 per HPwES completed project up to \$4,000 per project year to use towards advertising or promoting the program.




Submit this form along with a copy of the approved and completed marketing and advertising material, a copy of the paid invoice and proof of payment such as a cancelled check, credit card statement, etc. to: **HPCoopAdvertising@focusonenergy.com**

PLEASE NOTE: Third-party vendors may not submit forms on behalf of a participating Trade Ally. Make sure to black out all sensitive financial information on the documentation.

Checks are processed twice a month. Please allow up to 6 to 8 weeks to receive your reimbursement check. Checks will be mailed to the Trade Ally's address on record. To update your contact information, email **tradeally@focusonenergy.com**.

B. COOPERATIVE MARKETING – REIMBURSEMENT FORM

REIMBURSEMENT REQUEST FORM
COOPERATIVE ADVERTISING REIMBURSEMENT PROGRAM
 For Eligible HPwES Trade Allies
 Program Period January 1 – December 31, 2014
 Program Deadline: December 1, 2014

SECTION 1: TRADE ALLY COMPANY INFORMATION (Third-party vendors may not submit forms on behalf of a participating Trade Ally).

Company Name		Contact Name	
Mailing Address		City	State Zip
Phone Number		Email Address	

(STEP ONE: AD APPROVAL PROCESS)
STEP TWO: REIMBURSEMENT REQUEST PROCESS
 AFTER your approved (Step One) ad/marketing material has been published or consumed, submit the following items (see contact info at bottom of page):

Reimbursement Request Form
 Copy of Marketing Material (tear sheet/scan/photo of finished marketing material)
 Copy of Invoice*
 Proof of Payment* (cancelled check, cc statement)

*In lieu of an invoice AND proof of payment, you may provide a paid invoice only if supplied by the vendor. (Paid invoice must show vendor, billing to eligible Trade Ally, and details of charges.)

SECTION 2: REIMBURSEMENT INFORMATION (Requests for Coop funds MUST be submitted within 120 days of the invoice date. Trade Allies must have completed at least five (5) projects during the eligibility period and be in good standing with the program).

Marketing/Advertising Tactic (print, radio, etc.)	Advertiser/Vendor Name (as it appears on invoice)	Run Date(s)	Impressions or Circulation	Final Cost	Coop Percentage Amount	Requested Reimbursement Amount
				\$	50%	\$
				\$	50%	\$
				\$	50%	\$
				\$	50%	\$
				\$	50%	\$
				\$	50%	\$
TOTALS				\$	50%	\$

Focus on Energy Home Performance with ENERGY STAR Program does not partner with or endorse any specific media outlets. Signature signifies understanding and compliance with Cooperative Advertising & Reimbursement Guidelines. Advertisements cannot say or imply Focus on Energy endorses, approves, or warrants the Trade Ally, the Trade Ally's products, or the Trade Ally's work. Funds are available on a first-come, first-served basis and are based on program budget availability. Focus on Energy reserves the right to end or modify this program at any time, without notice.

Trade Ally Signature	Date
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OFFICE USE ONLY: REVIEW INFORMATION

Approved (Approval for all advertisements expire at the end of the calendar year. Please resubmit continuous ads in the beginning of each year and whenever a change is made to the ad template)
 Denied: Reason(s)

Number of Projects Completed	Coop Used	Coop Balance
Authorized Representative		Date

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 Mail: Focus on Energy Cooperative Advertising, 2821 Dairy Drive, Suite 5, Madison, WI 53718
 Email: HPCoopAdvertising@focusonenergy.com; Fax: 608.222.2923
 Questions: 608.729.9100

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AD APPROVAL FORM

COOPERATIVE ADVERTISING REIMBURSEMENT PROGRAM

For Eligible HPwES Trade Allies

Program Period January 1 - December 31, 2014

Program Deadline: December 1, 2014



SECTION 1: TRADE ALLY COMPANY INFORMATION (Third-party vendors may not submit forms on behalf of a participating Trade Ally).

Company Name	Contact Name		
Mailing Address	City	State	Zip
Phone Number	Email Address		

STEP ONE: AD APPROVAL PROCESS

- Note: All ads/marketing materials must be approved **BEFORE** publishing or use.
- Fill in chart below (**Ad/Marketing Tactic Information**)
- Submit this form and a draft of your ad/marketing materials for approval (see contact info at the bottom of this page).**
- Address any changes and receive Ad Approval

(STEP TWO: REIMBURSEMENT REQUEST PROCESS)

SECTION 2: AD/MARKETING TACTIC INFORMATION (All advertising material developed by the Trade Ally that promotes the HPwES program or its rewards must be submitted for approval before placement).

Marketing/Advertising Tactic (print, radio, etc.)	Advertiser/Vendor Name	Run Date(s)	Estimated Cost	Coop Percentage Amount	Estimated Reimbursement Amount
			\$	50%	\$
			\$	50%	\$
			\$	50%	\$
			\$	50%	\$
			\$	50%	\$
TOTALS			\$	50%	\$

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Trade Ally Signature	Date
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Authorized Representative		Date

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Email: HPCoopAdvertising@focusonenergy.com; **Fax:** 608.222.2923

Questions: 608.729.9100

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REIMBURSEMENT REQUEST FORM

COOPERATIVE ADVERTISING REIMBURSEMENT PROGRAM

For Eligible HPwES Trade Allies

Program Period January 1 – December 31, 2014

Program Deadline: December 1, 2014



SECTION 1: TRADE ALLY COMPANY INFORMATION (Third-party vendors may not submit forms on behalf of a participating Trade Ally).

Company Name	Contact Name		
Mailing Address	City	State	Zip
Phone Number	Email Address		

(STEP ONE: AD APPROVAL PROCESS)

STEP TWO: REIMBURSEMENT REQUEST PROCESS

AFTER your approved (Step One) ad/marketing material has been published or consumed, submit the following items (see contact info at bottom of page):

- Reimbursement Request Form
- Copy of Marketing Material (tear sheet/scan/photo of finished marketing material)
- Copy of Invoice*
- Proof of Payment* (cancelled check, cc statement)

*In lieu of an invoice AND proof of payment, you may provide a paid invoice only if supplied by the vendor. (Paid invoice must show vendor, billing to eligible Trade Ally, and details of charges.)

SECTION 2: REIMBURSEMENT INFORMATION (Requests for Coop funds MUST be submitted within 120 days of the invoice date. Trade Allies must have completed at least five (5) projects during the eligibility period and be in good standing with the program).

Marketing/Advertising Tactic (print, radio, etc.)	Advertiser/ Vendor Name (as it appears on invoice)	Run Date(s)	Impressions or Circulation	Final Cost	Coop Percentage Amount	Requested Reimbursement Amount
				\$	50%	\$
				\$	50%	\$
				\$	50%	\$
				\$	50%	\$
				\$	50%	\$
TOTALS				\$	50%	\$

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