

PART 2: Partner of the Year Award Application

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OVERVIEW

Eligibility: 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 for their customers and constituents.

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.

Description of Award: This award recognizes organizations that have demonstrated leadership and best practices in implementing energy efficiency programs and/or program portfolios that incorporate ENERGY STAR as a key strategy. Recipients of awards in this category distinguish themselves through their use of the ENERGY STAR brand, tools, strategies and resources to cost-effectively deliver near-term program results while also effectively overcoming market barriers to efficiency such that more efficient products, homes, buildings, and facilities become the norm. Organizations applying for this award are strongly encouraged to address how they are transforming the market for energy efficiency in the long term.

The goal of this award is to recognize comprehensive, high-performing energy efficiency programs and/or portfolios that have directly leveraged ENERGY STAR to achieve significant impact in the marketplace, advancing energy efficiency and related greenhouse gas emission reduction objectives.

NOTE:

- For organizations that have been recognized with ENERGY STAR Awards in past years, the award evaluation committee will assess applicants not only on their ability to sustain successful strategies from prior years, but on the new strategies and activities initiated in 2020. Applicants are encouraged to respond accordingly in their narratives.
- Flexibility is granted for the time horizon for reporting accomplishments, provided that the majority of accomplishments occur in calendar year 2020.

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PROGRAM CATEGORIES

Applicants may apply in one or more Program Category. Applicants are strongly encouraged to submit one comprehensive application, irrespective of internal organization/program management structure, to most effectively convey their organization's strategic use of the ENERGY STAR platform and partnership in advancing energy efficiency.

Category 1. Residential New Construction: Programs that promote the construction of ENERGY STAR certified homes and apartments by implementing program elements such as:

- Employing program design approaches that are based on the local housing market and unique program goals and reflect the most important regional factors for program success;
- Implementing marketing strategies that increase awareness of ENERGY STAR certified homes and apartments;
- Providing training to help builders and Raters become successful program participants;
- Utilizing strategic incentive structures that help to offset upgrade or verification costs;
- Implementing outreach approaches that create strong relationships with stakeholders, communicate procedures and expectations, and share important program information;
- Developing quality assurance protocols to ensure the integrity of the ENERGY STAR label and the applicant's program; and
- Using 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: Program Sponsors and Partners that promote or deliver Home Performance with ENERGY STAR by implementing at least one of the following program elements:

- Develops and implements marketing and outreach strategies that incorporate and leverage the Home Performance with ENERGY STAR brand with demonstrated project-generating results;
- Enhances program impacts through process improvements that improve the efficiency and delivery of projects, increase contractor participation in the Sponsor's program, and increase cost-effectiveness of the home performance portfolio;
- Utilizes program delivery strategies that achieve verifiable energy savings, improved safety and comfort, and enhance the durability and affordability of homes;
- Develops and implements innovative strategies to drive demand (e.g., lead generation, marketing campaigns, sales and marketing training, cooperative marketing) that result in high conversion rates for Home Performance with ENERGY STAR projects by participating contractors;
- Using evaluation, measurement and verification (EM&V) processes to assess progress and attainment of goals and facilitate continuous improvement in the implementation of the program, including systems for collecting and reporting project-level data on installed measures and

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- estimating and analyzing energy savings from home performance projects.
- Leverages funding, in-kind and other support from diverse market actors (e.g., electric and gas utilities, weatherization assistance and low-moderate income housing service providers, manufacturers, retailers, distributors, etc.);
- Promotes workforce development opportunities through mentoring, training, and recognition; supports and develops rigorous quality assurance and quality control processes and procedures;
- Effectively delivers HPwES programs and services to a diverse range of housing types, household demographics (e.g., low-moderate income, multifamily, rental, owner-occupied)
- Demonstrates leadership in the national, regional, state or local arenas to foster the advancement of the home performance industry.

Category 3. Certified Residential Products: Programs that are designed to overcome market barriers to widespread adoption of ENERGY STAR residential products and/or related best practices, such as permanent removal of older, inefficient appliances along with proper recycling, et cetera.

Category 4. Certified Commercial Products: Programs that are designed to overcome market barriers to widespread adoption of ENERGY STAR certified commercial products and/or related best practices, such as power management of data center servers, et cetera.

Category 5. Commercial and Industrial Whole Building Performance: 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 Treasure Hunt campaign, 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.

APPLICATION REQUIREMENTS

ALL application materials must be submitted electronically through your My ENERGY STAR Account (MESA) (www.energystar.gov/mesa) using the electronic application forms provided. These materials must include:

- **PART 1: General Instructions & Executive Summary** which includes a brief description of your organization and six bullet points showcasing your organization's main ENERGY STAR achievements during 2020 in the corresponding fields. *(required)*
- **PART 2: Award Accomplishments Document** consisting of your organization's responses to sections above and below within this application. *(required)*

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- **PART 3: Supporting Materials** Applicants are strongly encouraged to submit electronic samples of program materials and evaluation reports to support the narrative description. Importantly, applicants should provide examples of the use of the ENERGY STAR name and mark in customer and trade ally outreach that is not easily accessible to the public online. In addition, EPA will validate incorporation of ENERGY STAR label by reviewing use of the ENERGY STAR logo and educational content of the applicant's website, if they are otherwise deemed competitive applicants. *(minimum of 1 required)*
- **PART 4: Organization's High-Resolution Logo** *(required)*

Accomplishments—Applicants should provide a **detailed description of 2020 accomplishments** demonstrating how you have met the required criteria below.

Incremental Annual Energy Savings and Other Numerical Accomplishments—When highlighting accomplishments, please be sure to include **incremental annual energy savings** and specify whether they are **net** or **gross savings**.

- **Incremental Annual Energy Savings:** The difference between the amount of energy savings acquired or planned to be acquired as a result of energy efficiency activities in one year, and the amount of energy savings acquired or planned to be acquired as a result of the energy efficiency activities in the prior year.
- **Net Savings:** The change in energy consumption and/or demand that is attributable to an energy efficiency program. This change in energy use and/or demand may include, implicitly or explicitly, consideration of factors such as free ridership, participant and nonparticipant spillover, and induced market effects. These factors may be considered in how a baseline is defined (e.g., common practice) and/or in adjustments to gross savings values.
- **Gross Savings:** The change in energy consumption and/or demand that results directly from program-related actions taken by participants in an energy efficiency program, regardless of why they participated.¹

Applicants, particularly candidates for Sustained Excellence, may also wish to include **cumulative energy savings** defined as “the summation of energy savings (e.g., megawatt-hours, therms) from multiple projects or programs over a specified number of years, taking into account the time of measure installation in the first year, annual energy savings for subsequent years, and the average life of the installed measures.”² When providing cumulative accomplishments please be sure to include the beginning and end times.

Specification of Time Horizon—While incremental annual energy savings and other accomplishments need largely to have occurred in calendar year 2020, the application deadline as well as applicant program/fiscal year often make quantification and reporting difficult. As such, the applicant may provide estimated incremental annual savings and other data through the end of the

¹Source: [SEE Action Energy Efficiency Program Impact Evaluation Guide](#). December 2012

² Ibid.

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calendar year and specify that it is estimated or provide more precise data and include the time horizon (e.g., between October 2019 and October 2020). Please be consistent throughout the application, i.e., use the same method/time horizon for all accomplishments.

Context Matters, Tell Your Story—Don't assume that reviewers know your service territory or the local conditions that affect program performance. Putting data in context can help tell your story. For example, raw data on the number of ENERGY STAR certified homes your program facilitated can be strengthened by estimates of the percent of home starts they represent in your territory. Similarly, if you achieved the same or greater volume of equipment sales as the prior year, but the energy savings claims are lower due to a change in the baseline of comparison, that is important context.

PART 2: Award Accomplishments Document

(use the following information to create a Word or PDF file)

1. Narrative (no more than three pages per program category) (required):

It is recommended that each item, as defined below, be addressed explicitly in the application. Newer programs (those that have been in the market at least a year) are encouraged to apply, and scores will be weighted accordingly (i.e., more heavily based on program design and anticipated market effects than energy savings.)

Candidates **must** include the following in their submissions:

a. Category: Please identify all target Program Categories for your program(s)/initiative(s). If you address multiple Program Categories, please ensure that each category clearly addresses the following criteria.

NOTE: Sponsors that provide quantitative results of campaigns and initiatives will be considered more competitively than those who do not provide any quantitative information.

b. Program Design: 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.

c. Incorporation of ENERGY STAR: Describe how you have incorporated the ENERGY STAR platform as a central pillar of your program including

- Use of ENERGY STAR specifications and other marketing designations (e.g., ENERGY STAR Most Efficient)
- Branding with ENERGY STAR—explicit use of the ENERGY STAR logo and the words “ENERGY STAR certified” in consumer education and outreach initiatives (website, point of purchase signing, advertising, web, social media and events, etc.)
- Leveraging of ENERGY STAR messaging, tools, and strategies including program design best practices (e.g., ESRPP), online tools (e.g. Ways to Save Tips web services) and campaign initiatives (e.g., Flip your Fridge, Rule your Attic, Battle of the Buildings). Information about our Marketing Materials can be found at [here](#).

d. Market Effects: Please 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 (e.g., improved energy

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performance of buildings and homes in your region, changes in ENERGY STAR awareness or availability/sale of ENERGY STAR certified products, homes, or services). 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.

Examples of market effects *include, but are not limited to*, the following:

- 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

e. Program Category-Specific Market Effects: Applicants must provide the following information specific to the Program Category(ies) covered in your application:

- **For Residential New Construction:**
 - o Promoting Retention and Growth in ENERGY STAR Certified Homes

Describe and quantify efforts to retain and increase ENERGY STAR participation by builders and Raters. Provide the following numbers for both 2020 and 2019, and the percent change in these numbers between years:

 - Total number of homes built in your service territory
 - Number of incentivized ENERGY STAR certified homes in your service territory
 - Number of incentivized non-ENERGY STAR certified homes in your service territory
 - Number of builders participating in your program
 - Number of Home Energy Raters participating in your program
 - The program implementation budget directed to residential energy efficient new construction programs overall and to ENERGY STAR certified homes specifically, both in dollar terms and as a percentage of your overall implementation budget
 - o Educating Homebuyers About ENERGY STAR Certified Homes

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Innovative program marketing efforts in 2020 that utilized the ENERGY STAR brand to increase homebuyer awareness of, and demand for, ENERGY STAR certified homes. Quantify your examples (e.g., number of media impressions, number of website visits, number of brochures distributed). Examples may include:

- Developing ENERGY STAR-related marketing collateral (printed materials, online content, social media, etc.)
 - Assisting builders and Raters with marketing ENERGY STAR certified homes (e.g., training sales agents and/or real estate professionals)
- o Assisting Builders and Home Energy Raters in Meeting Program Requirements
- Describe your program's efforts in 2020 to directly assist builders and Raters in meeting ENERGY STAR program requirements in 2020. Quantify your examples (e.g., number of HVAC contractors trained on ENERGY STAR program requirements, number of technical trainings provided to builders, etc.). Examples may include:
- Efforts to engage local HVAC contractors about quality installation and ENERGY STAR program requirements
 - Providing technical support and/or training to builders and/or Raters
- o Demonstrating Leadership with ENERGY STAR
- Describe your program's efforts in 2020 to be a leader in the ENERGY STAR Certified Homes program. Examples may include:
- Implementing innovative program solutions to overcome market and/or regulatory barriers
 - Promoting the value of the ENERGY STAR Certified Homes program to other organizations and delivering ENERGY STAR information at industry conferences and meetings

NOTE: Sponsors implementing tiered incentive programs where the ENERGY STAR Certified Homes program is not the entry-level tier should only report results from those that participated at the ENERGY STAR level.

- **For Home Performance with ENERGY STAR:**

- o Marketing
 - Describe innovative marketing that specifically highlights and leverages the Home Performance with ENERGY STAR platform including examples and metrics
- o Program delivery approaches
 - Highlight innovative solutions to grow Home Performance with ENERGY STAR, such as motivating homeowners to take action; integration of educational tools and documentation to educate homeowners and capture the value of home performance improvements; developing a low-to-moderate income program; partnering with trade allies, workforce development organizations and vocational education institutions to foster diversity and grow the contractor workforce, and/or promote economic development opportunities through the energy efficiency industry

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- Process improvements that improve the efficiency of program delivery while addressing barriers to project delivery (e.g., field inspections and/or in-person contact with homeowners);
- Completed projects by participating contractors³
- Lead generation and marketing strategies, including conversion rate metrics
- Provide examples of substantiated measurement and verification of performance of improved homes (from third-party program impact evaluation studies using commonly accepted EM&V methodologies, pre- and post-project billing analyses or metered consumption analyses)
- o Workforce infrastructure development
 - Demonstrate support for development of local contractor networking and advocacy
 - Activities to recruit and train participating contractors as demonstrated by production rates, retention, number of Home Performance with ENERGY STAR Contractor of the Year Award (previously known as the Housing Innovation Award) winners, Century Club Contractors, etc.
 - Detail successful recruitment and growth of the home performance workforce through partnerships with individual trades and the home improvement industry, and others
- o Leadership
 - Provide evidence for 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
 - Develop or test innovative, scalable approaches to delivering Home Performance with ENERGY STAR that are replicable for sponsors across the country
 - Demonstrate innovation in one or more areas of Home Performance with ENERGY STAR program administration and delivery, such as cost-effectiveness, customer engagement, service delivery to low-moderate income households, integration of advanced technologies and/or installation practices, and adoption of certification systems that can be integrated with local, regional or national real estate and appraisal systems.
- **For ENERGY STAR Certified Residential Products:**
 - o Increase in sales or market share of ENERGY STAR certified products—and any tiered subsets, vis a vis non-certified model

³ HPwES completed projects include a test-in/assessment, the work or installation of energy saving measures, and a test-out.

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- o Increase in shelf space devoted to ENERGY STAR certified products and/or increase in dealer stocking for certified products
- o As applicable, number of older/inefficient units permanently removed from service (e.g., properly recycled)

For ENERGY STAR Certified Commercial Products:

- o Increase in sales or market share of ENERGY STAR certified products—and any tiered subsets, vis a vis non-certified models
- o Increase in dealer/supplier stocking and/or marketing of certified products
- o As applicable, number of older/inefficient units consolidated and/or removed from service
- o As applicable, increase in use of power management features

- **For Commercial and Industrial Whole Building Performance:**

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

f. Data Sources: Please 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).

PART 3: Supporting Materials **at least one required, as described in the Application Instructions above)**

Prepare/Gather Remaining Documents for Upload

PART 4: Organization High-Resolution Logo **(required)**

ENERGY STAR® is the government-backed symbol for energy efficiency, providing simple, credible, and unbiased information that consumers and businesses rely on to make well-informed decisions.