

Request for Proposal

2019 Residential Lighting Program

Manufacturer and Retailer Cooperative Promotions on ENERGY STAR®-Qualified Lighting Product

PROMOTIONAL PERIOD:
JANUARY 1, 2019 - DECEMBER 31, 2019

PROPOSALOS DUE:
OCTOBER 8, 2018 P.M. CDT

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1.0 Introduction

WECC is pleased to announce the competitive 2019 ENERGY STAR® Lighting Request for Proposal (RFP). We invite manufacturers and retailers of qualified products to submit proposals for a region-wide consumer awareness campaign, instant rebate, and markdown promotion with a variety of scheduled start times ranging from January 1, 2019 through December 31, 2019, in the states of Colorado, Illinois, Iowa, Michigan, Minnesota, New Mexico, South Dakota, and Texas.

1.1 WECC's Mission

WECC is a mission-driven, nonprofit organization delivering real energy solutions for the benefit of our clients. For more than 30 years, WECC has led the industry in designing, administering, and implementing energy efficiency and renewable energy programs across the country. WECC champions innovative energy initiatives that produce enduring economic and environmental benefits for all.

1.2 WECC's Core Values

- Getting real energy savings results
- Commitment, passion, and persistence
- Addressing the energy needs of limited-income customers
- Real-world problem solving
- Quality
- Sustainability
- Partnerships

1.3 Scope of Project

The primary goals of the ENERGY STAR-qualified LED Lighting Program include:

- Raise awareness of the benefits of using ENERGY STAR lighting products.
- Increase total socket penetration of ENERGY STAR qualified lighting in households.
- Execute comprehensive promotional plans to maximize cost-effective energy savings while increasing sales and awareness around a wide variety of ENERGY STAR-qualified lighting products.
- Demonstrate promoting ENERGY STAR-qualified lighting products can generate financial profits, as well as positive public relations and consumer behavior change.
- Expand the selection of ENERGY STAR-qualified lighting products in the retail setting.
- Establish a competitive price point for LEDs in WECC's customer markets.

1.4 Options for Program Participation

- **Product Markdown:** This is the only approach to be utilized during the 2019 program year.

Each proposal must clearly indicate the markdown program type will be utilized.

2.0 Key Dates

Milestone	Due Date
RFP Issued	September 17, 2018
Written Questions Due	October 3, 2018
Answers to Questions Posted to Website	October 5, 2018
Proposals Due*	October 8, 2018 at 4:00 p.m. CDT
RFP Scoring Complete	Approximately November 2, 2018
Award Notifications	November 9, 2018

*Proposals must be submitted electronically to: retailpartners@weccusa.org.

2.1 Promotion Participation Requirements

2.1(a) Eligible Products

Only ENERGY STAR-qualified medium and candelabra screw-based LED replacement lamps and LED down light fixtures (as listed on www.energystar.gov), are eligible. Promotional products must be qualified under the most current version of the appropriate ENERGY STAR specification.

Additionally, the following bulb types are **not** eligible for the programs at this time:

- PAR 20/R20, MR16
- Pin-based LED
- Linear LED
- LED products that are less than 40 watt equivalent

Note: WECC reserves the right to exclude specific products from this promotion at any time, for any reason, including results of independent, third-party testing. Manufacturers may suggest replacement products. However, WECC is under no obligation to accept these replacements.

- All products must have a competitive price point prior to the incentive being applied in order to provide the best value to utility sponsor customers.
- All product pricing, after incentives are deducted from the retail price, must remain active as long as incentive allocation is available and the item remains on the WECC-approved product list. Incentive reimbursement will not be made for products sold with no incentive provided to customers.
- All products must maintain ENERGY STAR qualification for the duration of the program. In the event products are removed from the ENERGY STAR qualification list, the manufacturer must notify WECC in writing within two business days of disqualification.

- All advertising and signage must be approved by WECC and the utility sponsor and include the following:
 - The ENERGY STAR logo in print materials (logos available from WECC).
 - Sponsor logo in print materials (logos available from WECC).
 - Language stating: “Offer is valid only while supplies last.”
 - Language stating: “Promotion is limited to 12 bulbs/units per customer.”
 - Self-funded promotions are encouraged when utility sponsored advertising funding is not utilized; in accordance with the guidelines identified herein.
 - All materials must adhere to the utility sponsor’s brand identity guidelines and the U.S. Environmental Protection Agency (EPA) and U.S. Department of Energy’s (DOE) ENERGY STAR identity guidelines if materials feature the ENERGY STAR brand.
- Provide retailer/manufacturer support in the development and/or printing of point-of-purchase (POP) materials.
- Approved signage must be maintained in retail locations throughout the promotional period.
- Retailers or their manufacturing partners who can provide store merchandising service to affix promotional materials in key places within the stores is encouraged.
 - Incentives must be delivered by offering an instant discount at POP via a markdown.
 - Proposals that include mail-in reward programs **will not** be considered.
 - Submit monthly invoices and Point-of-Sale (POS) order reports via email.
 - Track allocation (orders minus sales) by retail store location and send **weekly/monthly report via email. Sales must be reported on by the 15th of the following month.**
 - Communicate to stores once allocation has been reached. Product sold over allocation allotment will not be reimbursed by a utility sponsor.
- A manufacturer representative, as well as a retailer key decision-maker, shall participate in a pre-program launch and a midway point check-in via conference call outlined in the agreement. The manufacturer cannot represent retailers. A representative from the retailers’ corporation is required to participate.
- Manufacturer order forms being utilized for independent retailers must be submitted to WECC for approval no later than 30 days prior to the start of the promotion in order to ensure accuracy of information.

2.1(b) Program Duration

Promotional program start dates will vary by individual state, utility, retailer, etc. as determined by WECC when finalizing the master agreements and implementation plans. The overall time period for the 2019 lighting program begins January 1, 2019, and runs through December 31, 2019.

2.2 Types of Proposals Requested

WECC is accepting proposals for markdown programs only. For all proposals submitted, respondents must include a complete description of the promotion, as well as a detailed description of all products being proposed.

2.3 Summary of Proposal Preferences

Preference will be given to proposals which:

- Feature non-traditional, hard-to-reach distribution channels (i.e., rural, drugstores, grocery, convenience, etc.).
- Include strong marketing and retail support from manufacturers and/or retailers (see Marketing Plan for Promotion section).
- Create retail and marketing plans that support the purchase of energy efficient lighting.
- Support long-term behavior change through customer and sales associate education:
 - Lighting technology features and benefits (LED).
 - Reinforcing energy-efficient lighting benefits through education around the Energy Independence and Security Act of 2007 (EISA).
- Establish a strong commitment to deliver products, documentation, and sales data in a timely manner.
- Confirm retailers or manufacturers will comply with monthly invoices, sales data requirements, and reporting deadlines.
- Include a quality assurance process to filter out non-qualified purchases of more than 12 units per customer limit.
- Include a balanced mix of standard and specialty bulbs (LED).

2.4 Program Details

Respondents apply for third-party funding to help reduce the regular retail prices on ENERGY STAR qualified lighting products. See list below. The product markdown option is WECC’s required promotion mechanism, no coupon promotions are allowed.

2.4(a) Product Markdown Incentives Promotion Description

Respondents will apply for a markdown by proposing maximum quantities of each product and the amount of reimbursement requested for each product (see Section 4 Sponsor Incentive Guidelines per bulb). Reimbursement for incentives on qualified products will be made at 100 percent of the agreed amount contingent upon receipt of acceptable and timely point-of-sale (POS) sales data. Instructions for data submittal will be included in the agreement between the manufacturer, retailer, and WECC. Data will be submitted **every month for the previous month’s sales** in the required format.

- Product markdown incentive proposals for retailer markdowns in the supplied ZIP code listing and states.
- POP materials, including utility sponsor names and/or logos.
- Retailer cooperative advertising funding may be available.

ENERGY STAR-Qualified Products
LED replacement bulbs: 4+ watts (A-Line, PAR/BR Lamps, Globe, Candelabra)
LED Downlight Retrofit Kits 8+watts – must be medium screw-in based

3.0 Participating States and Qualified Measures

	LEDs	LED Downlight	LED Hardwire Fixture
Colorado	Yes	No	No
Iowa	Yes	Yes	No
Illinois	Yes	Yes	No
Michigan	Yes	Yes	No
Minnesota	Yes	Yes	YES (MN POWER ONLY)
New Mexico	Yes	Yes	No
South Dakota	Yes	No	No
Texas	Yes	No	No

Note: WECC reserves the right to change or terminate projections, allocations, and program types at any time.

3.1 Monthly POS Reporting and Invoicing

3.1(a) Required

- Proposals must include sample POS reports and invoices. This is a monthly report due with corresponding matching invoices, **it must be supplied electronically by the 15th day of the month for the previous month sales.** POS reports and invoices must:
 - Be separated by state and product type.
 - Assure date ranges are the same on both the POS and invoice and clearly notated.
- POS must include all of the following: store number, store name and address, product-specific sales data manufacturer model number, retailer model number, product description, total packs, total bulbs, documented incentive by product, total incentive requested for bulbs, total incentive requested by packs, total incentives, total retail sales, and date range.
- Sales data and invoices should not include returns or exchanges. Participating retailers must reconcile this before sending to WECC.
- Once product mix, packaging, and quantities are established and agreed upon, they cannot be changed without prior written approval from WECC.
- Quality assurance process that filters out customer purchases above the contract requirement of “no more than 12 units per customer.”

3.1(b) Desired

- Complete and accurate POS sales data and matching invoices to WECC by the 15th day of the following month.

4.0 Maximum Sponsor Incentives Funded Per Bulb

Below is a list of sponsor incentive guidelines per qualified product for markdown and instant rebate programs.

ENERGY STAR-Qualified Product	Potential Incentive*
LED replacement bulbs A-line, BR, PAR lamps, globe, candelabra, retrofit fixture kits and hardwire LED fixtures	\$0.25 - \$2.00

Note: WECC reserves the right and has the sole discretion to adjust the incentive amount in accordance with proposed incentives received from the respondents (factoring into consideration bids that include a competitive retail price per bulb with a low incentive amount) and deemed by WECC to be in the best interest of the program.

Lower incentive amounts may also be negotiated during the time of award at a program or product level. Requests for incentives beyond these levels will be considered on a case-by-case basis. Respondents must justify why they require a higher incentive.

5.0 Marketing Plan for Promotion

Manufacturers and retailers are encouraged to include the following marketing activities in the marketing portion of their proposals and how they will:

- Enhance visibility of WECC’s 2019 Residential Lighting Program at the POP within retail stores.
- Educate and inform customers on watt-to-lumen conversions, recycling, and EISA impacts within a retail setting using print, trainings, special events, and/or web.
- Provide planograms and/or describe promotional product placement, such as end caps, pallets, and front-end displays.
- Reinforce sponsor recognition by using provided POP materials or develop approved, unique materials.
- Support WECC’s efforts to educate consumers and sales associates about the benefits, application, and usage of qualified products.
- Describe opportunities for cooperative advertising such as tabs/inserts, newspaper advertising, radio, newsletters, direct mail, etc.

6.0 General Proposal Requirements

Each proposal package must be submitted on time and include the following information in order to be considered:

- A complete proposal bid.
- Statement of capability describing previous successful experience participating in lighting promotions.
- Marketing plans.

- Accurate, up-to-date store listings including store number, address, city, state, ZIP code. List must also filter out stores that are participating with other utility programs with special review in Michigan. Post office boxes are not accepted as an address.
- Completed and signed proposal checklist and signature form (Appendix B: PROPOSAL COVER SHEET, CHECKLIST AND SIGNATURE FORM).
- Statement of agreement to obtain any necessary permits required by law and to abide by all federal, state, and local codes relevant to this program.
- Independent hardware and grocery store submittals must be separated by store type, retailer name and/or buying group, i.e., Ace, True Value, Do it Best, and United Hardware stores are separate from independent retailers.

7.0 Proposal Selections and Award Process

7.1 Preliminary Evaluation

WECC reserves the right and has the sole discretion to make multiple awards, reject any and all proposals, to accept or reject any or all of the items in the proposal, and award the contract in whole or in part as it is deemed by WECC to be in the best interest of the program. WECC may also negotiate any of the details of proposals prior to contracting.

Proposal selection will be made by WECC in its sole discretion. Moreover, proposal selection is the sole responsibility of WECC. Submitted proposals will be reviewed by WECC to determine if all general proposal requirements are met. Failure to meet all such requirements may result in rejection of the proposal.

In the event respondents do not meet one or more of the requirements, WECC reserves the right to continue the evaluation of any proposals submitted and to select the proposal which most closely meets the requirements specified in this RFP.

7.2 Proposal Scoring

Accepted proposals may be evaluated using a two-tier process. Tier I will include review by a WECC evaluation committee and will be scored against the stated evaluation criteria. A respondent may not contact any member of the evaluation committee or Utility Sponsor regarding scoring. The evaluation committee may review references, request interviews, and/or conduct on-site visits and use the results in scoring the proposals. The evaluation committee's scoring will be tabulated and proposals will be ranked based on the numerical scores received.

The Tier II scoring process may be enacted, in WECC's sole discretion, for the highest scoring vendors. The Tier II scoring process may include participating in an interview after proposals are scored under Tier I by the evaluation committee.

7.3 Tier I Elements and Scoring Weights for Scoring the Proposals

Tier I scoring will be weighted as follows:

7.3(a) Competitive Final Retail Price (15 points)

- Scored against other competitive proposals.

- Scored against regular retail pricing (without program/incentive).
- Retail pricing must remain at contracted level for duration of six months from program launch.

7.3(b) 2018 POS Reporting (Up to 20 points)

7.3(b1) Option One – POS Data with Market share (20 points available)

Marketshare breakdown of sales data by the following categories: LED, CFL, Incandescent, and 2018 POS Category Sales for eight months:

- Broken down by store locations.
- Number of LED in SKU/pack incented and non-incented.
- Final selling price.
- Lamp type (e.g., A-lamp, decorative, globe, reflector, dimmable, etc.).
- ENERGY STAR vs. non-ENERGY STAR bulbs for the time period the reports are covering (January-August 2018).

OR

7.3(b2) Option Two – POS Data (15 points available)

2018 LED POS Category Sales for eight months:

- Broken down by store locations.
- Number of LED in SKU/pack incented and non-incented.
- Final selling price.
- Lamp type (e.g., A-lamp, decorative, globe, reflector, etc.).
- ENERGY STAR vs. Non-ENERGY STAR bulbs.
- Time period the reports is covering (January–August 2018).

7.3(c) Feedback from WECC Program Team (10 points)

Feedback will be requested from WECC's program managers, program coordinators, POS data team, and accounting department. Feedback will be based on prior year's campaign, including achievement to goals, pricing, signage, invoicing, sales data timeliness, ease of implementation, etc. This score will be neutral if the submissions of both the retailer/manufacturing partner pair disclose that neither participated in 2018.

7.3(d) Total Manufacturer & Retailer Contributions (10 points)

Total contribution for direct product support (i.e., reductions in wholesale or retail product cost/price, retailer produced POP materials, other store level marketing efforts, product placement at store level, and other advertising support).

Manufacturer's contributions should be handled directly between the manufacturer and retailer.

7.3(e) Proposed Product Mix (10 points)

Variety/style of ENERGY STAR lighting products.

7.3(f) Marketing Plans, Events & Education (10 points)

Creative marketing plans, special events and/or consumer education plans supporting program marketing goals, behavior change, in-store demonstrations, product labeling, and activities outlined in this RFP. See **Appendix C: Retailer Marketing, Merchandising and Education Plan** link on Page 12.

7.3(g) Monthly POS & Invoicing Examples (10 points)

POS reporting and invoicing that include all data requirements and confirm the ability to submit both items to WECC by the 15th day of the following month. Template **Appendix E: Weekly/Monthly Sales Reporting Template** link on Page 12.

7.3(h) Geographical Distribution of Stores by Retail Channel (5 points)

WECC will give preference to submissions maximizing participation with independent and small chain retailers in rural and hard-to-reach market locations, especially hardware, grocery, ethnic, and drug stores. If there is detailed consumer data from any of the locations, it should be provided in the proposal. Examples: ZIP code data and other consumer characteristics.

7.3(i) Prominent Retail Product Placement (5 points)

Proposals should emphasize prominent retail product placement and include planogram examples. For example: End caps, pallet displays, ½ pallet displays, and front-end displays.

7.3(j) Product Quality (5 points).

All products must be ENERGY STAR qualified as of the start date of the promotion. This list can be found on the ENERGY STAR website.

7.3(k) Program Compliance Quality Assurance (5 points)

Program sales cannot exceed more than 12 units/bulbs per customers. The program is targeted at residential and small business customers and not contractors. Include a QC/QA plan that filters out non-compliance purchases before they are submitted for payment.

7.3 (l) Incumbent retailer / manufacturer partner (5 points)

Retail and manufacturer partners that successfully participated in the WECC retail lighting programs within the past two years.

7.3 (m) Recycling options or availability (3 points)

Proper disposal and access to recycling continues to be a concern for customers purchasing CFLs. Retail partners providing in-store access of recycling options to customers for CFLs receive an additional three points on their RFP score. Responses must include detail about the recycling program including any conditions or fees being charged to the customer and a list of store locations providing the recycling service.

7.4 Notification of Intent to Award

- All respondents will be notified via email of WECC's intent to award the contract(s) as a result of this RFP.
- Award notification will include respondent scores upon request. Copies of proposals are not available for public inspection.

7.5 Confidentiality

Subject to litigation or other legal disclosure and/or audit requirements, WECC will not disclose information submitted in response to this RFP.

7.6 Waiver of Claims

Respondent waives any right it may have to bring any claim, whether in damages or equity, against WECC or any of their respective employees, directors, officers, agents, or contractors, with respect to any matter arising out of any process associated with this RFP.

7.7 Conflicts of Interest

Respondents must avoid conflicts of interest. "Conflict of Interest" means a situation where a respondent's interest, or what can be perceived to be a respondent's interest, is, or appears to be, at odds or not aligned with the best interests of the program, WECC, or their customers or contractors. A Conflict of Interest can result when a respondent is involved in multiple interests, one of which could possibly affect a respondent's judgments, decisions, motivations, recommendations, or actions on projects, tasks, or assignments. A Conflict of Interest can also arise where a respondent has a conflicting incentive or the appearance of a conflicting incentive, financial or otherwise that could reasonably call into question the independence of the respondent's judgments, decisions, motivations, recommendations, or actions. A Conflict of Interest may result from other factors as well.

7.8 Right to Appeal

Respondents may file an appeal if: 1) there is clear evidence of a procedural irregularity in the RFP process as outlined within this document, or 2) there is clear evidence supporting a lack of competitiveness affecting the integrity of the RFP process. All other requests to appeal will be rejected (including, but not limited to, any appeal challenging WECC's exercise of its discretion, the relative weight of the evaluation criteria, the formula for assigning points in making an award determination, etc.). Respondents shall bear their own costs incurred from an appeal.

Respondents may appeal an award decision by sending a written appeal within five business days of receipt of notification of WECC's intent to award. The appeal must specify the basis of the appeal and provide all evidence to support such basis; include the signer's name; include a mailing address; include a daytime telephone number; and be submitted to:

WECC
Attn: Tim Mathison
431 Charmany Drive
Madison, WI 53719
Or email to: tmathison@weccusa.org

A WECC appeals committee will initially review the appeal to determine if it qualifies and it provides sufficient specific facts to support the appeal.

If the request for an appeal review is denied because it does not meet one of the steps of the appeal stated above, the respondent will have one additional opportunity to file an amended request within

five days of receipt of the Notice of Denial. If the amended request is denied, the respondent will have no further administrative recourse.

If the appeal is accepted, it will be reviewed by the WECC appeals committee, and comprised of persons who were not directly associated with the evaluation of the proposals. WECC appeals committee members will include, but will not be limited to, the WECC Procurement Manager, the applicable WECC Program Portfolio Director, and one other WECC employee who is not directly associated with the evaluation of the proposals.

Following review and investigation, the WECC appeals committee will submit its recommendations to the applicable Program Director for final review and approval. Within 10 business days from receipt of the appeal, the WECC appeals committee will issue a final written decision. Following the final decision of the WECC appeals committee, there will be no additional consideration of the subject appeal.

A respondent that fails to file an appeal within the time limits established above will be deemed to have waived its right to be heard by the WECC appeals committee.

7.9 Terms and Conditions

Contractor must enter into a Memorandum of Understanding with WECC.

7.10 Submitting Proposal and Deadline

Respondent must submit a complete electronic proposal for acceptance by **October 8, 2018; 4:00 p.m. CDT to: RetailPartners@weccusa.org**. Faxed and mailed proposals will not be accepted.

Please insert “2019 Residential Retail Lighting Program RFP” in the subject line.

Respondents will not be reimbursed for any expense associated with the preparation of a proposal. Proposals will be evaluated by WECC, in its sole discretion, on the basis of the evaluation criteria stated above. WECC may select one or more respondent(s) and/or proposal(s), but reserves the right not to select any respondent or proposal and to negotiate with selected respondent(s).

7.11 Questions

Questions regarding this solicitation must be made via e-mail to retailpartners@weccusa.org and submitted by October 3, 2018. No questions delivered in any other fashion will be answered. Answers to the questions will be attached to the original RFP posted to the website at www.weccusa.org, “RESOURCES,” “REQUESTS FOR PROPOSALS,” after the question due date referenced above.

Proposals must include all appendices for all manufacturer and retail partners. The completed Appendix materials should clearly identify each party’s responsibilities, retail store locations participating in each targeted state, and the support each team member will contribute. Proposals may include other documentation; WECC may disregard any proposal that does not have the application or other materials completely filled out. Both the manufacturer and retail partner must sign the proposal indicating approval of the information submitted and willingness to participate with

the submitting partner in the event funding is awarded. Proposals submitted without a retail partner approval will be disqualified from consideration.

WECC will review performance of recommended lighting products against independent third-party testing and will not accept any products not performing to the ENERGY STAR specification, regardless if it is listed as a qualified product.

WECC may choose to work with multiple manufacturer and retailer partners at our discretion. These are only estimates and projections, WECC reserves the right to change the channel allocation, bulbs, and incentive amounts or reduce / terminate programs.

Items Needed For Bid Submission

- Appendix B: Proposal Cover Sheet, Checklist and Signature Form
 - Ensure there are retailers and manufacturer signatures. Bids will not be accepted without them.
- Appendix C: Retailer Marketing, Merchandising & Education
 - Planogram desired
- Appendix D: Product Store Workbook
 - Separate file required for each retail/manufacturer submission
- Appendix E: Weekly/Monthly Sales Reporting
 - Sample POS monthly sales data file and sample invoice
- 2018 POS Sales Data Reports (LED category and market share)