

Xcel Energy

Manufacturer and Retailer Cooperative Promotions on Lighting Products

Promotional Period:

January 1, 2025 – December 31, 2025

Proposal Due:

December 20, 2024

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1.0 Introduction

Slipstream is pleased to announce the competitive 2025 Lighting Request for Proposal (RFP). We invite manufacturers and retailers of qualified products to submit proposals for a regionwide consumer awareness campaign, instant rebate, and markdown promotion with a variety of scheduled start times ranging from January 1, 2025, through December 31, 2025, in the states of Colorado, Michigan, Minnesota, New Mexico, South Dakota, and Texas.

1.1 About Slipstream

Slipstream creates, tests, delivers and scales the next generation of energy efficiency and renewable energy programs that move us farther, faster toward a clean energy economy. Slipstream partners with utilities, local and state governments, regulatory agencies and other organizations to inspire new solutions to big energy challenges. Since 1980, Slipstream has demonstrated “what’s next” in programs and technologies and is an established and trusted trailblazer in the industry. Whether we’re in the field monitoring energy savings from the newest technologies, partnering with community-based organizations to serve hard-to-reach markets, inspiring building professionals to adopt low-energy design approaches, or financing thousands of clean energy projects in your state Slipstream has the knowledge, people and resources to help you meet your most challenging clean energy goals. Our team of industry experts will handle all your needs—including research, program design, administration, implementation, trade ally recruitment, building science education and oversight, training, marketing, outreach and more. We have a solid record of real market transformation and savings that endure. Our record for meeting and exceeding goals on time and within budget is impeccable. And we take pride in sharing the benefits of the clean energy economy with leading manufacturers, retailers, developers, builders and contractors who grow their businesses and expand the market for energy-efficient goods and services.

1.2 Slipstream’s Mission, Vision, and Core Values

- Slipstream Mission: Accelerating climate solutions. For Everyone.
We champion and deliver innovative energy initiatives that produce enduring economic and environmental benefits for all. We strive to achieve our mission through the work we do for our clients but are also committed to improving the sustainability of our own business practices—and that of our headquarters in Madison, Wisconsin—by purchasing environmentally-responsible products, minimizing energy and water use, and reducing waste. Learn more about our corporate sustainability plan, how we achieved a net zero carbon footprint, and some of the specific initiatives we engaged in to get there.
- Slipstream Vision: A world consuming energy responsibly for the economic and environmental benefit for all.
We unveiled our new mission and vision statements, as well as our nine values, to our employees back in February to refocus and reignite our passion for what we do daily. Ever since, our team members have been more inspired than ever by the influential work we do here at Slipstream. Nothing can stand in the way of our vision, and how crucial our role is in making it happen!

- Slipstream Values:
 - Personal Drive: We individually and collectively value high levels of personal resourcefulness, enterprise, and creativity and the positive impact they have on organizational performance
 - Excellence: We share a personal commitment to delivering high-quality results in everything we do. Excellence is the foundation on which we build lasting relationships with our clients, partners, and each other.
 - Great Work Environment: We endeavor to be a great place to work that is motivating, professionally rewarding, and fun. We value the diversity, contribution, and development of all our staff members.
 - Collaboration: We actively listen and use constructive feedback to foster efficient, results-focused teamwork. We likewise seek partners who recognize the value of a close working relationship.
 - Exceptional Service: We serve our clients by providing outstanding, personalized service. We anticipate, listen, and respond to their needs to exceed expectations.
 - Results-Focused: We offer solutions to produce tangible and measurable results for our clients, customers, and partners. We are determined to meet our commitments in a timely manner.
 - Integrity: Integrity is the foundation of all our relationships. We express honesty, accountability, trust, and respect to unite us in fulfilling our mission.
 - Mission-Driven: Our mission drives our strategies, programs, and products; the markets we engage; and the people we work with and hire as a nonprofit organization.
 - Commitment to Community: We commit our time and capabilities to serving the communities in which we live and work.

1.3 Scope of Project

The primary goals of the LED Lighting Program include:

- Raise awareness of the benefits of lighting products.
- Increase total socket penetration of qualified lighting products in households.
- Execute comprehensive promotional plans to maximize cost-effective energy savings while increasing sales and awareness around a wide variety of energy efficient qualified lighting products.
- Expand the selection of energy efficient qualified lighting products in the retail setting.
- Establish a competitive price point for energy efficient qualified lighting products in Slipstream customer markets.

1.4 Options for Program Participation

- Product Markdown: This is the only approach to be utilized during the 2025 program year.

2.0 Key Dates

Milestone	Due Date
RFP Issued	11/26/2024
Written Questions Due	12/06/2024
Answers to Questions Posted to Website	12/13/2024
Proposal Due*	12/20/2024
RFP Scoring Complete	12/26/2024
Award Notifications	01/15/2024

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

2.1 Promotion Participation Requirements

2.1(a) Eligible Products

The following products are eligible in this program, while the Energy Star designation and guideline have been removed, we are still requiring the minimum guidelines of 15,000 hours and 45 lumens per watt.

- GSL bulbs – A19, PAR30, PAR
- TLEDs
- Grow lights
- Shop lights
- Undercounter fixtures
- Holiday lights
- Smart plugs
- Smart switches
- Smart strips

Additionally, the following energy efficient products are **not** eligible for the programs currently:

- Air purifiers
- Desk lamps
- Weatherization

Note: Slipstream 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, Slipstream is under no obligation to accept these replacements.

- All products must have a competitive price point prior to the incentive being applied 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 Slipstream-approved product list. Incentive reimbursement will not be made for products sold with no incentive provided to customers.
- All products must maintain basic energy efficiency qualification for the duration of the program. All advertising and signage must be approved by Slipstream and the utility sponsor and include the following:
 - Sponsor logo in print materials (logos available from Slipstream).

- 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. 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 Slipstream for approval no later than 30 days prior to the start of the promotion 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 Slipstream when finalizing the master agreements and implementation plans. The overall time period for the 2025 lighting program begins January 15, 2025, and runs through December 31, 2025.

2.2 Type of Proposal Requested

Slipstream 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. All information must be included in Appendix C: Product Store workbook. All fields must be filled out including the total incentive requested from the sponsor field.

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.
- 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.

2.4 Program Details

Respondents apply for third-party funding to help reduce the regular retail prices on energy-efficient-qualified lighting products. See list below. The product markdown option is Slipstream'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 Slipstream. 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.

3.0 Monthly POS Reporting and Invoicing

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 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 Slipstream.
- Once product mix, packaging, and quantities are established and agreed upon, they cannot be changed without prior written approval from Slipstream.

- Quality assurance process that filters out customer purchases above the contract requirement of “no more than 12 units per customer.”

3.1 Desired

- Complete and accurate POS sales data and matching invoices to Slipstream 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 - \$17.50

Note: Slipstream 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 Slipstream 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 Slipstream’s 2025 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 Slipstream’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. (Appendix A: 2025 Master Zip Code List.)
- 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

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

Proposal selection will be made by Slipstream in its sole discretion. Moreover, proposal selection is the sole responsibility of Slipstream. Submitted proposals will be reviewed by Slipstream 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, Slipstream 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 Notification of Intent to Award

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

7.3 Confidentiality

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

7.4 Waiver of Claims

Respondent waives any right it may have to bring any claim, whether in damages or equity, against Slipstream 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.

7.5 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, Slipstream, 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.

7.6 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 Slipstream'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 Slipstream'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:

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

A Slipstream 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 Slipstream appeals committee, and comprised of persons who were not directly associated with the evaluation of the proposals. Slipstream appeals committee members will include, but will not be limited to, the Slipstream Procurement Manager, the applicable Slipstream Program Portfolio Director, and one other Slipstream employee who is not directly associated with the evaluation of the proposals.

Following review and investigation, the Slipstream 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 Slipstream appeals committee will issue a final written decision. Following the final decision of the Slipstream 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 Slipstream appeals committee.

7.7 Terms and Conditions

Contractor must enter into a Memorandum of Understanding with Slipstream.

7.8 Submitting Proposal and Deadline

Respondent must submit a complete electronic proposal for acceptance by December 20, 2025; 4:00 p.m. CDT to: RetailPartners@Slipstreaminc.org. Faxed and mailed proposals will not be accepted.

Please insert “2025 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 Slipstream, in its sole discretion, based on the evaluation criteria stated above. Slipstream 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).

7.9 Questions

Questions regarding this solicitation must be made via e-mail to retailpartners@slipstreamusa.org and submitted by December 6, 2025. 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 <https://slipstreaminc.org/opportunities/rfp/2025-lighting-request-proposal> 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; Slipstream may disregard any proposal that does not have the application or other materials 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.

Slipstream 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 of if it is listed as a qualified product.

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

Items Needed for Bid Submission

- ☐ Appendix A: 2025 Master Zip Code List
- ☐ 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: Product Store Workbook
 - Separate file required for each retail/manufacturer submission