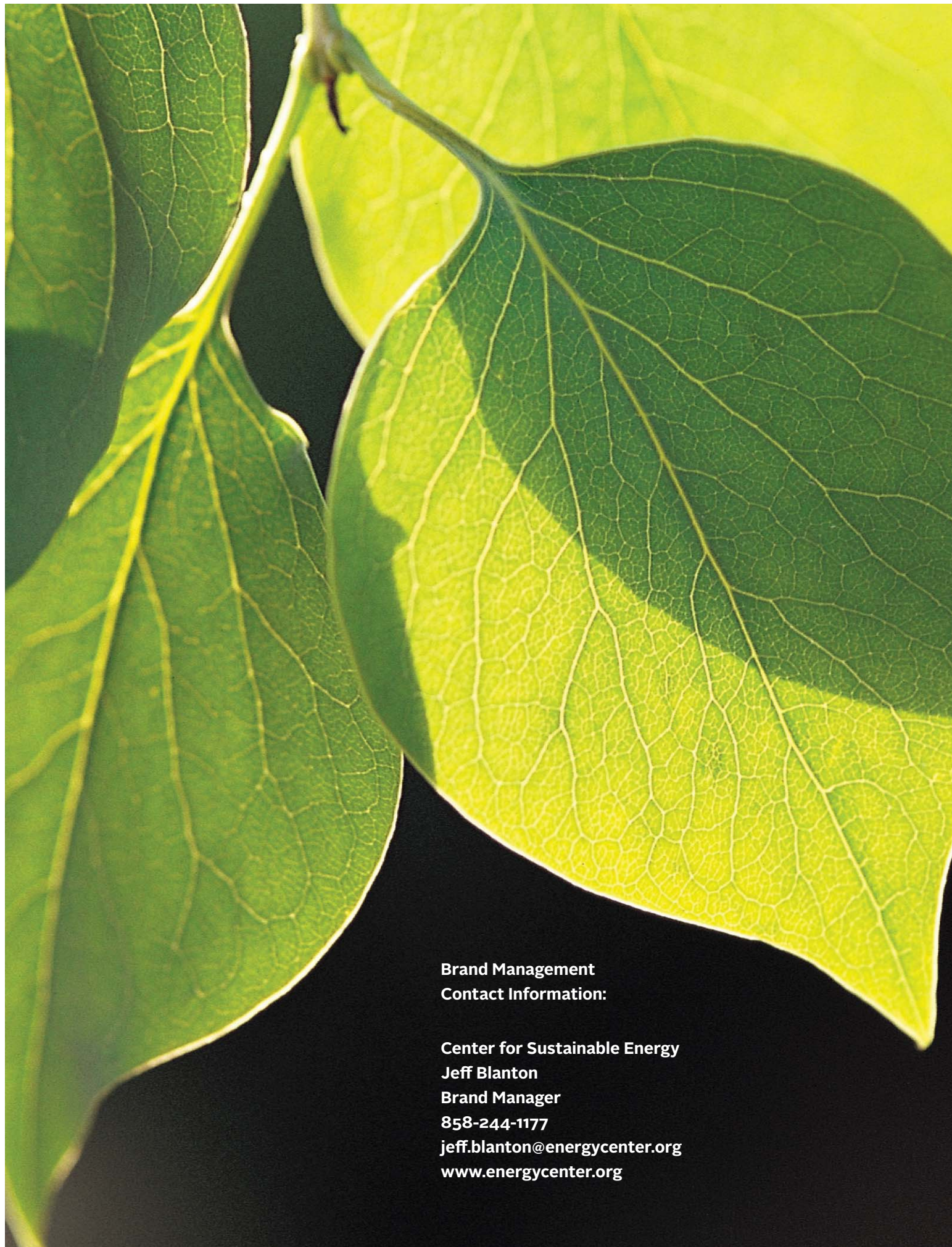


Energy Upgrade California™ Home Upgrade

Usage & Graphic Standards Guide



Home Upgrade
Energy Upgrade California™



**Brand Management
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1 | Energy Upgrade California™ Home Upgrade Sub- Brand Strategy



Home Upgrade

Energy Upgrade California™





Energy Upgrade California™ Home Upgrade Sub-Brand Strategy

USING THE GUIDELINES

The Usage and Graphic Standards Guide provides a foundation for clear and consistent communication of the program's identity.

Adherence to the Energy Upgrade California™ Home Upgrade brand standards benefits all participating utilities, cities and counties, partners, and affiliates. By consistently presenting the Home Upgrade image, we build stability and raise the level of recognition and credibility among target audiences and the community at large.

This document includes a description of the Home Upgrade sub-brand and guidelines for use—such as required colors and typefaces, as well suggested taglines and use of imagery. Specific content includes:

- **Identity**
Logos, colors, typography and imagery are all central elements of branding. It is critical that all Home Upgrade marketing materials follow these guidelines.
- **Applications**
The Home Upgrade identity should be used on all program-related media. The examples in this section provide ideas on

ways to brand promotional materials and events, as well as template examples for letterhead (Microsoft Word), poster (PDF) and slide presentations (PowerPoint).

- **Co-Branding**

Program partners play a vital role in marketing Home Upgrade. The appendices of this document include guidance on ways for partners to market themselves using the brand.

If you have questions about the usage and application of the Home Upgrade sub-brand, or the design of the collateral, please contact jeff.blanton@energycenter.org.

USING THE ENERGY UPGRADE CALIFORNIA HOME UPGRADE BRAND

To ensure the success of the Home Upgrade sub-brand, it is important that co-branded marketing highlight the unique services and strengths of program partners while presenting Home Upgrade appropriately consistently, and accurately representing the relationship between brands.

The Home Upgrade sub-brand assets (logo, colors, graphic elements) may be used by any authorized partner including state agency, city or county, or independent- or municipal-owned utility.

Participating Contractors and Raters have access to Home Upgrade logos for their marketing materials. Partner companies, including realtors, retail outlets and other commercial organizations, may use the brand only with permission from the Center for Sustainable Energy (CSE).

All co-branded collateral must adhere to color, size and clearspace guidelines described in the “Identity” section of this document.

The guidelines, as well as graphics, photography and templates for program communications, are available in the Resource Library—**www.EnergyUpgradeCA.org/en/partners/partner-resources**.

For specific co-branding information and how to access the Resource Library, see Appendix B: Cities and Counties and Appendix C: Participating Contractors.

ACCESSING THE RESOURCE LIBRARY

The following are the instructions to access the Home Upgrade Resource Library:

- **Step 1**
Go to www.EnergyUpgradeCA.org/en/partners/partner-resources.
- **Step 2**
Choose your appropriate group from the list of links.
- **Step 3**
Enter your Username and Password. If you need these, contact Jeff Blanton at jeff.blanton@energycenter.org
- **Step 4**
You may download documents or save them to a “drop box” that you set up.

USING THE OFFICIAL HOME UPGRADE DISCLAIMER

Since Home Upgrade is a sub-brand of the more encompassing Energy Upgrade California brand, it is appropriate to use the Home Upgrade disclaimer. The following is the current Home Upgrade disclaimer language as approved by the California Energy Commission, California Public Utilities Commission and the Investor Owned Utilities in October 2013.

Energy Upgrade California™ Home Upgrade provides assistance and incentives for home improvement projects that can reduce energy use and make homes more comfortable. This statewide program is managed locally by utilities and regional energy networks and directed by the California Public Utilities Commission in collaboration with the California Energy Commission. Funding comes from utility customers under the auspices of the California Public Utilities Commission. Incentives are offered on a first-come, first-served basis and are effective until funding is expended or the program is discontinued. Programs may be modified or terminated without prior notice. ©2014 Energy Upgrade California. Trademarks are property of their respective owners. All rights reserved.

Usage of the Disclaimer

The disclaimer must be used in all materials as listed below. If space for the disclaimer is not available or you have any questions about its use, please contact Jeff Blanton at jeff.blanton@energycenter.org.

- **Marketing Collateral:** brochures, flyers, pamphlets, door hangers, rebate forms etc..
- **Print Ads:** Newspaper, magazine, weekly publications etc...
- **Broadcast:** TV and radio
- **Outdoor:** Billboards, bus shelter ads, lawn signs, events signs etc.
- **On-line:** If space permits; must be on landing page.
- **Homeowner Presentations**

Graphic Standards for the Use of the Disclaimer

The intention is to communicate this disclaimer. It should not compete with the marketing message and also not be so tiny that people are not able to read it.

- **Font size** – Must at least 30% of the largest font on the ad and not smaller than 10pt font.
- **Location on ad** – generally place at the bottom third of the ad or the back of a brochure

HANDLING FRAUDULENT ACTIVITIES

Fraudulent Marketing

Several incidents of unauthorized use of the Energy Upgrade California brand have occurred. Specifically entities were cold calling homeowners and referring to themselves as the Energy Upgrade program or another derivative of the name. In response to this, consumer information was placed on the statewide website and a process for reporting fraudulent activity was put in place. The process is outlined below.

As a Program representative if you come across any issues of suspected phony telemarketing or other potential fraudulent marketing please complete a Fraudulent Activity Report (found in the Resource Library) and email the report to: Ke Hao Ouyang at kehao.ouyang@cpuc.ca.gov and please copy Jennifer Caron at Jennifer.Caron@cpuc.ca.gov and Jeff Blanton at jeff.blanton@energycenter.org

SOCIAL MEDIA

Since Home Upgrade is part of the more encompassing Energy Upgrade California brand, it is not allowed to have social media pages named Energy Upgrade California. If you have questions regarding Home Upgrade and social media, please contact Jeff Blanton, at jeff.blanton@energycenter.org.

USE OF LEAD GENERATING OR TELEMARKETING ORGANIZATIONS

The Energy Upgrade California initiative has spent a good deal of time and money to build its brand across the state. Because of this, the campaign puts a great deal of importance in making sure organizations who use the brand do not create any negative impacts for the brand.

Over the past couple of years, the initiative has received numerous complaints regarding lead generators and telemarketing calls. We understand that these outreach tools are important and useful for landing new business however, it is important that these tools are used with the highest integrity and commitment to protecting the brand's reputation. This section outlines new guidelines for organizations using lead generators or telemarketing.

- Lead generating employees must clearly identify the sponsor contractor. They can't imply that they are employees of, or have been contracted by Energy Upgrade California.
- Websites for lead generating companies must provide a phone number and/or address for their company. Simple contact forms are not sufficient.
- Lead generators may not ask for any personal or financial information.
- The Telemarketer must identify the contractor who paid for the service by name, and not imply the call is from the Energy Upgrade California.
- Organizations using telemarketing must make it easy for individuals to have their number removed from the database.
- Organizations using telemarketing must scrub their databases through the national do not call registry quarterly.

Organizations that use lead generators and/or telemarketing services that do not follow these guidelines may lose their ability to use the Energy Upgrade California brand.

VOCABULARY

Home Upgrade imagery and messaging must be consistent to insure stability, recognition and credibility.

While each partner organization and utility is unique, it is important that we speak about Home Upgrade with one voice.

Here are a few tips to follow when communicating about the Home Upgrade and its related building performance program:

- Use “Energy Upgrade California™ Home Upgrade” on first reference. On a second reference continue to use “Home Upgrade” and NEVER USE EUC Home Upgrade, EUCA HU, HU, or any other abbreviation.
- Regional designations are not allowed (i.e., “The San Diego County Energy Upgrade California™ Home Upgrade Program.”)
- When referring to Home Upgrade, avoid using terms such as “retrofit,” “remodel” or “whole-house retrofit.” These terms are associated with more extensive and expensive projects or seismic work.
- Use “home” or “house” instead of “residence” or “property” which sound less personal.
- Use all initial caps to denote titles including “Energy Upgrade California Home Upgrade Participating Contractor” and “Participating Contractor.” The terms “authorized,” “endorsed,” “certified” and “qualified” are not allowed. The exception is for the related “Whole-House Home Energy Rating” program; Raters are called “certified.”
- Do not use “satisfaction” or “homeowner satisfaction guaranteed.”
- Participating Contractors should avoid using terms such as “audit” or “inspector” as research shows negative reaction to these. Instead, use “home energy assessment” or “comprehensive assessment” or “technical assessment.”

- Participating Raters should avoid using the terms “test-in” and “test out” when describing energy assessments. Instead, use “initial assessment” and “final rating.”
- Use “Participating Contractor” or “Whole House Rater” to describe the person who is doing the assessment, not “auditor” or “assessor.” These terms imply an association with income and property taxes.
- Use “rebates and incentives” to cover both utility and county/city programs, if available. These are technically called incentives, not rebates, although homeowners more readily understand rebates.
- Use “utility bills” instead of “electric bill” or “gas bill.”

For sample media messages, talking points and FAQs, visit the Resource Library—[**www.EnergyUpgradeCA.org/en/partners/partner-resources**](http://www.EnergyUpgradeCA.org/en/partners/partner-resources).

2 | Home Upgrade Identity



Home Upgrade

Energy Upgrade California™



**REBATES for
RENOVATIONS**



Home Upgrade

Energy Upgrade Califc

www.EnergyUpgradeCA.com



Home Upgrade Identity

INTRODUCTION

This Usage and Graphic Standards Guide provides a foundation for clear and consistent communication of the identity. Adhering to common standards ensures that the correct name and mark of **Energy Upgrade California™ Home Upgrade** appears on all communications and collateral.

The usage and graphic standards have been carefully developed through detailed consideration of many factors, both functional and aesthetic.

In media—publications, websites, advertising, signage, online, letterhead, or business cards—layout, color and typography are orchestrated to impart a unified “signature.” This document includes a description of the Home Upgrade logo and guidelines for use—including required colors and typefaces, as well as taglines and use of imagery.

The goal of this guide is to add consistency to all media over time. Each piece of communication builds upon and complements the established image, and creates a clear and positive impression of Home Upgrade and its partners.

HOME UPGRADE LOGOS



The look and feel of the Home Upgrade identity is determined by three basic components: the Energy Upgrade California icon (house and leaves), color and typography. These elements have been carefully designed and selected to project a coherent, pleasing and meaningful image of the Home Upgrade Program to our audiences. Intelligent application across a wide variety of media, from online ads to signage, will ensure the continued strength of our visual presence.

The logo is designed to represent the message, not send it. The use of the Energy Upgrade California icon conveys the idea that this program is part of the larger umbrella brand. The colors are light and lively and the typography is designed so that it complements the icon.

Approved logos are included in the Energy Upgrade California brand assets package available on the Resource Library—

www.EnergyUpgradeCA.org/en/partners/partner-resources.

Proper and improper applications of the logo are described on the following pages.

ELEMENTS OF THE LOGO

The logo



The logo is made up with the icon from the Energy Upgrade California logo combined with the Home Upgrade name, a thin delineating line and the Energy Upgrade California name. Always use the original approved art. Never alter any aspect of it.

HOME UPGRADE VS ADVANCED HOME UPGRADE

Use the Home Upgrade logo if the marketing materials discuss both paths.



Use the Advanced Home Upgrade logo if the marketing materials are specifically for the Advanced Path.



LOGO VARIATIONS AND SIZE

Preferred full color



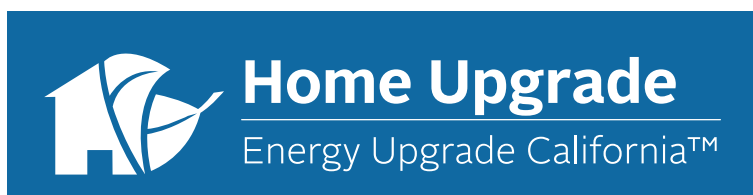
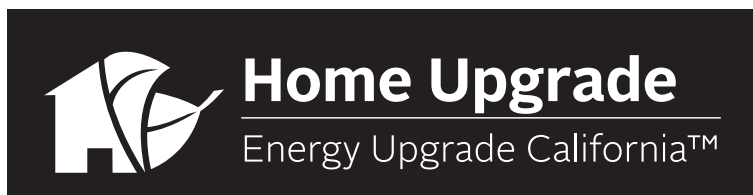
Preferred one-color + black



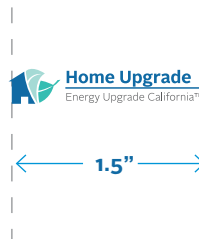
Acceptable one-color variations



One-color variations against dark backgrounds



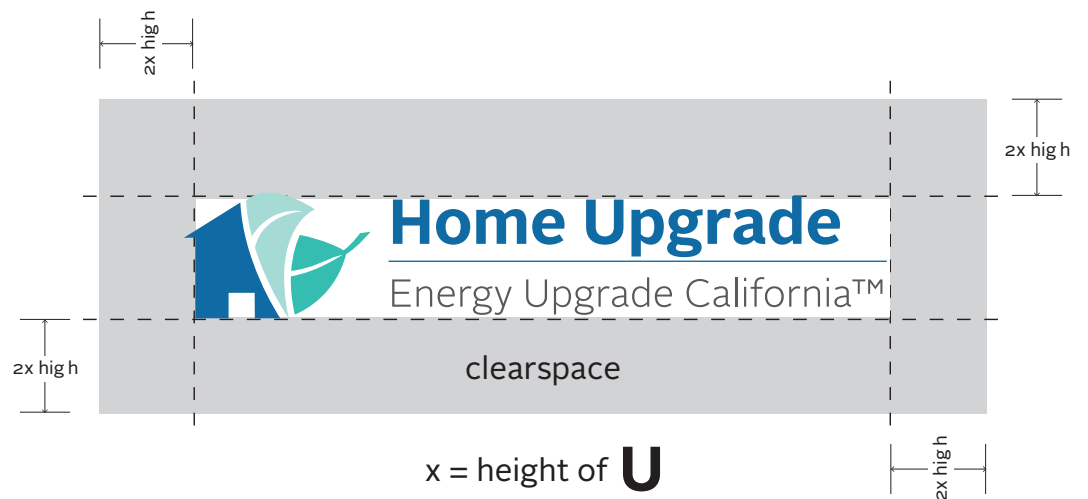
Minimum size



The Home Upgrade logo is not to appear smaller than 1.5 inch in width.

LOGO CLEARSPACE

Clearspace provides a protective area surrounding the logo within which no other graphic elements such as another logo, typography, pictures, art or borders may intrude. The clearspace must equal 2 times (or more) of the height of the letter “u” in Home Upgrade. Never allow any other elements within the clearspace.



CO-BRANDING WITH HOME UPGRADE

How to co-brand with Home Upgrade

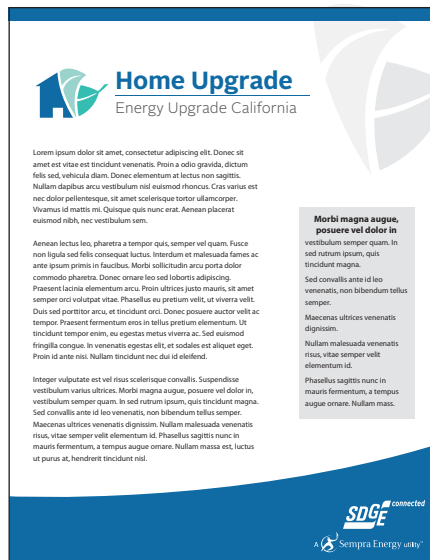
We have outlined three scenarios on how to co-brand with the program. If none of these scenarios fit your needs, please contact Jeff Blanton at jeff.blanton@energycenter.org.

Prior to any use of the Home Upgrade logo, organizations must have a signed a Brand Sublicense Agreement on file with CSE.

All co-branded materials must be signed off by the Brand Manager prior to production. Email material to Jeff Blanton for review. Please allow up three business days for turnaround.

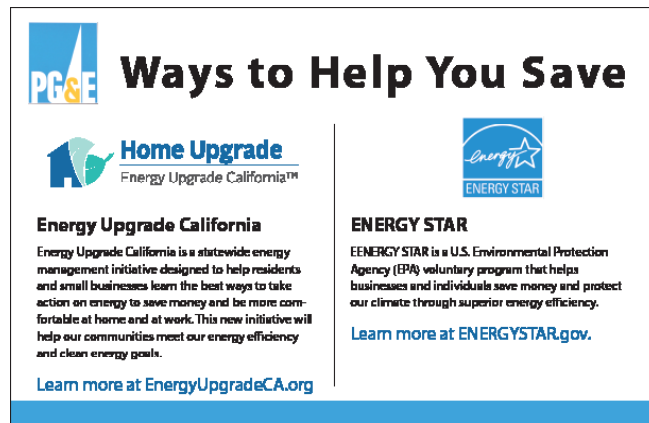
Scenario 1: This scenario is for outreach materials that are specifically designed to market the Home Upgrade Program.

- The Home Upgrade logo needs to be predominately displayed on the material so it clearly indicates the material is about the Home Upgrade Program.
- Partner logos should be second in nature to the Home Upgrade logo and not be larger than the Home Upgrade logo.
- Must use the Home Upgrade color palette.
- Must adhere to the clearspace rule (see page 19)
- Needs to include the Home Upgrade disclaimer.



Scenario 2: This scenario is for organizations mentioning the Home Upgrade Program on marketing materials with other programs/ initiatives.

- The Home Upgrade logo must be sized similar to other program logos.
- Must adhere to the clearspace rule (see page 19).
- Does not have to include the disclaimer.



Scenario 3: Participating Contractors may use this special Home Upgrade logo to promote their status with the program on company marketing materials.

PARTICIPATING CONTRACTOR



Home Upgrade

Energy Upgrade California™

PARTICIPATING CONTRACTOR

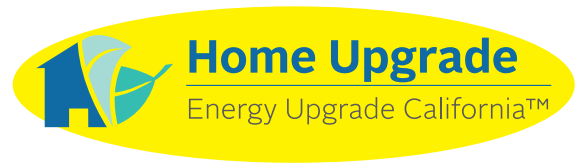


Home Upgrade

Energy Upgrade California™

BAD USE OF THE LOGO

The following are examples of how NOT to use the Home Upgrade logo.



THE NAME IN TEXT

In text within a document, on a web page, or other printed materials the name is to appear as shown (use the “™” on first reference with Energy Upgrade California):

Energy Upgrade California™ Home Upgrade

After first reference, the name may be abbreviated in text as:

Home Upgrade

Do not use the acronym HU, EUC HU or EUCA HU.

THE NAME IN TRANSLATION

The name may be translated once in text, after the official name in English. For instance, in Spanish it should appear as **Energy Upgrade California™ Home Upgrade (Mejoras para ahorrar energía modernize su hogar)**. Thereafter the name Home Upgrade should be used in English.

For use in radio spots (without visuals) the name should be **Energy Upgrade California Home Upgrade** in English, followed by the name translated.

See examples below.

The logo should only be used in English in both print and online collateral. The tagline, headlines and all other information may be translated into appropriate languages.

spanish

**Mejoras para ahorrar energía
modernize su hogar**

chinese

加州能源升級計劃—住宅升級

korean

에너지 업그레이드 캘리포니아 주택 업그레이드

tagalog

Pagbubutihan ng Kuriyente sa Bahay

COLOR PALETTE

A Pantone® color palette has been selected to create a distinctive look for all Home Upgrade materials. The preferred primary color is Pantone® 7691.

Process CMYK color builds of the Pantone colors are acceptable for print. RGB color builds may be used for monitor viewing. CMYK and RGB values are listed below.

Pantone® 7691



Pantone® 3265

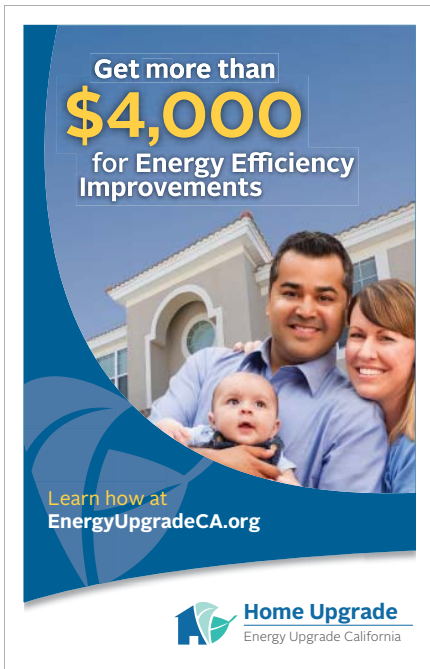


Pantone® 123



	C	M	Y	K
7691	91	58	13	0
3265	70	0	37	0
123	0	24	94	0

	R	G	B
7691	18	105	162
3265	39	189	178
123	255	195	36



GRAPHIC ELEMENTS

Using these preferred graphic elements in collateral further strengthens Home Upgrade's identity.

Graphic elements, such as the sail and leaf, are included in the a Home Upgrade brand assets package available on the Resource Library—www.EnergyUpgradeCA.org/en/partners/partner-resources.

Sail and semi-circle

The “sail” creating a semi-circle is the preferred graphic element that should be displayed on promotional collateral. It must be a solid-colored image, using one of the colors from the palette. This element contains title text. It is sized to touch the top, left and right sides of the collateral piece. The semi-circle may be reduced to allow for a larger “sail” in order to incorporate more text. It is recommended that text place in the sail be kept to a minimum. The “sail” can contain the “leaf” image or remain a solid block of color.

the sail

the semi-circle

the lower arc



the leaf

Lower arc

The white space below the “sail” must be kept clear for the Home Upgrade logo. No other headlines, logos or art elements should appear in this space.

Leaf

The “leaf” is another graphic element that can be used in a variety of ways. It must be a one-color image, using one of the required colors from the palette, black, white or a percentage of one of these colors. It can be displayed as a solid graphic or a percentage of a color. Sizing can vary from a small bullet, to a large “ghosted back” background image. **This graphic element should never be used in place of the logo, icon or logotype; it is to be used only as a complementary art element.**

Pop-up box

The “pop-up box” is an element that gives prominence to one key message in a promotional piece. The box should be a single color from the palette. The type should be white or a color from the palette that has good contrast; and there should be ample space around the text. The box has rounded corners and a drop shadow.



the pop-up box

TAGLINE

Taglines are valuable and indispensable. They reflect positioning, brand personality, core values and the brand message of the program. They are short and to the point. A single line communicates the core message of Home Upgrade, which would have otherwise been difficult to communicate through any other channel or mode of communication.

The ARRA-related tagline “Reduce energy use. Save money. Create jobs.” is no longer recommended as the job creation aspect of the initiative is not a core goal. Please discontinue its use.

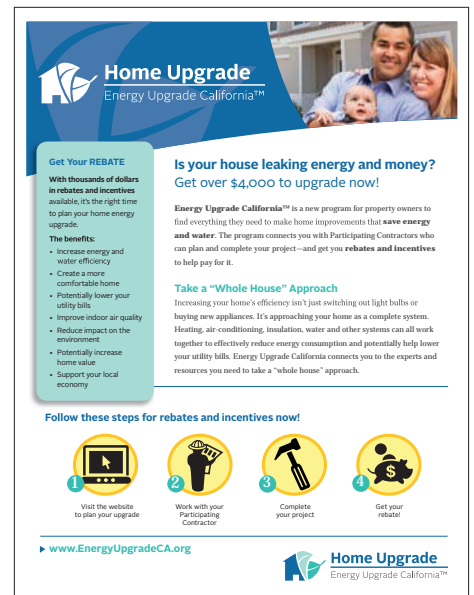
Opportunities for customization

You may develop one or more locally specific taglines for use with the sub-brand. These must be approved and documented by CSE. Ideally the tagline should be three short “sentences,” totaling about six to eight words. However, a short single phrase is also acceptable, as long as it contains a call-to-action and does not exceed eight words. Taglines may be translated as appropriate.

Preferred placement of the tagline is to the left of or below the Home Upgrade logo.

Customized tagline examples

- “Improve your home. Use less. Save money.”
- “Improve your home. Save money. Go green.”
- “Save money. Get rebates. Improve your home.”



sample fact sheet with pop-up box

TYPOGRAPHY

The Alright Sans font is preferred for most of the typography for Home Upgrade. This includes taglines, headlines, subheads, etc. The Alright Sans font may also be used for body text.

Alright Sans Light

abcdefghijklmnopqrstuvwxyz
ABCDEFGHIJKLMNOPQRSTUVWXYZ
1234567890

Alright Sans Medium

abcdefghijklmnopqrstuvwxyz
ABCDEFGHIJKLMNOPQRSTUVWXYZ
1234567890

Alright Sans Regular

abcdefghijklmnopqrstuvwxyz
ABCDEFGHIJKLMNOPQRSTUVWXYZ
1234567890

Alright Sans Bold

abcdefghijklmnopqrstuvwxyz
ABCDEFGHIJKLMNOPQRSTUVWXYZ
1234567890

The Georgia font is preferred for body copy in mostly business collateral, documents and letters. Georgia may also be used as body text in promotional material. The Calibri font is preferred for body copy for any material that is to be displayed on the Internet. Calibri may be used on print collateral if the Alright Sans font is unavailable.

Georgia Regular

abcdefghijklmnopqrstuvwxyz
ABCDEFGHIJKLMNOPQRSTUVWXYZ
1234567890

Georgia Italic

*abcdefghijklmnopqrstuvwxyz
ABCDEFGHIJKLMNOPQRSTUVWXYZ
1234567890*

Georgia Bold

**abcdefghijklmnopqrstuvwxyz
ABCDEFGHIJKLMNOPQRSTUVWXYZ
1234567890**

Calibri Regular

abcdefghijklmnopqrstuvwxyz
ABCDEFGHIJKLMNOPQRSTUVWXYZ
1234567890

Calibri Bold

**abcdefghijklmnopqrstuvwxyz
ABCDEFGHIJKLMNOPQRSTUVWXYZ
1234567890**

PHOTOGRAPHY

Style

The preferred images for Home Upgrade are photographs. These images offer viewers a glimpse of what they hope to be, how they hope to live and what to strive for. They portray a sense of style, intelligence and energy.

Attributes and characteristics

The images chosen for most Home Upgrade collateral should be in full color. They should be professionally shot, or can be purchased stock images. They should portray an energetic and active lifestyle, and should connect people with their homes. The images should be dynamic and creatively cropped so that they are visually appealing.

Images of people should be candid, diverse in heritage and look like everyday people, not models. They should be involved in an activity. Overall, they should look happy.

Product images—or images that show what type of upgrades are eligible for the Home Upgrade program—should be focused on the product with the least amount of background clutter possible. This can be achieved by a close, zoomed-in crop.

Photography libraries and rights

To support your marketing efforts, pre-approved, professional photographs are available for Home Upgrade partners in the Resource Library—www.EnergyUpgradeCA.org/en/partners/partner-resources.

The single-family collection of photographs captures aspects of the measures, diagnostic testing and improvements associated with the Home Upgrade program. See Appendix B.

Photography style examples

Below are photographs that demonstrate the preferred photography style for Home Upgrade. See Appendices D and E for actual photographs available for download and use in marketing materials.

Lifestyle



Dynamic, creatively cropped, focus on the feeling of happiness and comfort. People are included, but not the focus of the photo.

People



Diverse, non-typical, everyday people images. Focus on people involved in an activity.

Products



Clean, uncluttered images with interesting angles and close crops. Direct focus on the particular product.

Photography color variations

Black and white (grayscale), one-color (from the approved palette) and two-color (palette color and black) photos may appear on Home Upgrade collateral when necessary. Black and white, one-color and two-color photos should be used in media where full color is not available.

When producing one-color photos, a color from the color palette should be used—with the exception of Pantone® 123 and Pantone® 1788 which may not be legible. When producing two-color photos, 100% black should be used for the image and a 50% tint of one of the colors from the palette should be the background.



*one-color photo using
Pantone® 7691*



*one-color photo using
Pantone® 3265*



*one-color photo using
Pantone® 555*



*one-color photo using
Pantone® 2725*



*two-color photo using
black for image and 50%
tint of Pantone® 7691
for background*



*two-color photo using
black for image and 50%
tint of Pantone® 3265
for background*



*two-color photo using
black for image and 50%
tint of Pantone® 555
for background*



*two-color photo using
black for image and 50%
tint of Pantone® 2725
for background*

ILLUSTRATION

Style

Though the main imagery of Home Upgrade collateral is photography, there are instances where illustrations may be needed. Spot illustrations (small illustrations not contained within a border) may be used to impart a quick visual understanding of a section of text. Illustrated icons, such as the “leaf” graphic element, may be used for web buttons and text bullets.

The preferred Home Upgrade illustration style conveys a positive feeling, is hip and intelligent and has a sense of humor. The style of illustration should be simple, not overdrawn. The modernist or mid-century style of illustration best suits this.

Through illustration, we can portray Home Upgrade as a friendly, down-to-earth, approachable program.

Attributes and characteristics

Hip, bold, colorful illustrations with a sense of style best represent the program. Illustrations should be hand-drawn or computer-generated using a drawing application such as Adobe Illustrator. The illustrations should be either one- or two-color with no background, and contain colors from the palette. Do not deviate dramatically from the graphic styles seen on the next page.

Sample icon and house illustrations are included in the Energy Upgrade California brand assets package available on the Resource Library—www.EnergyUpgradeCA.org/en/partners/partner-resources.



hand-drawn house illustration



computer-generated illustrated icons

3 | Home Upgrade Applications



Home Upgrade

Energy Upgrade California™



Home Upgrade
Energy Upgrade California™

Energy Upgrade California's Home Upgrade

Homeowner's Guide to Whole House Energy Efficiency



3

Home Upgrade Applications

INTRODUCTION

The following pages show the sub-brand applied to sample collateral pieces: brochures, fact sheets, print ads, online ads and more. They all follow the preferences set forth in this guide in regards to logo application, color, typography, and photo and illustration usage. These sample materials have not been updated with the new rebate amounts, program details and disclaimer. If you would like to use these sample materials, please contact Jeff Blanton at jeff.blanton@energycenter.org.

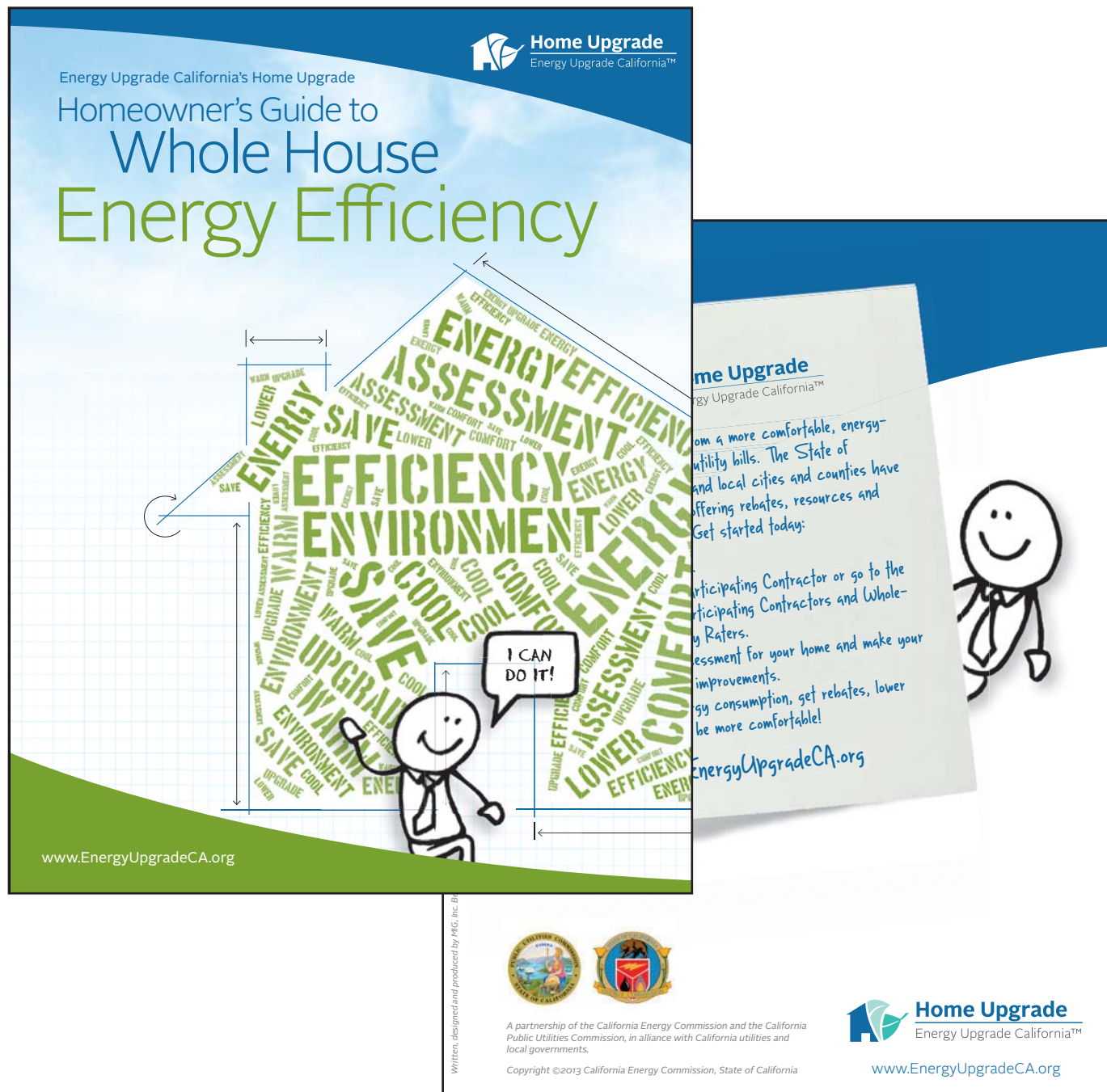
In creating any piece of collateral it is important to understand what you are trying to achieve:

- **Know your audience.** Who are your viewers and what do you want them to feel or do?
- **Allow for breathing room.** Do not try to fill pages with lots of information, much of which may not be read.
- **Be critical when selecting images.** Photos, illustrations and graphics should adhere to the style set forth in this guide.
- **Give a clear “call to action.”** Include full contact details, website and email address to connect the customer to more information.

Please remember to send your outreach materials to Jeff Blanton (jeff.blanton@energycenter.org) before sending to print to ensure usage guideline compliance.


BROCHURE EXAMPLES


These are samples only, not for public use.



FACT SHEET EXAMPLES

These are samples only, not for public use.


Home Upgrade
 Energy Upgrade California™



Get Your REBATE

With thousands of dollars in rebates and incentives available, it's the right time to plan your home energy upgrade.

The benefits:

- Increase energy and water efficiency
- Create a more comfortable home
- Potentially lower your utility bills
- Improve indoor air quality
- Reduce impact on the environment
- Potentially increase home value
- Support your local economy





Is your house leaking energy and money?
Get over \$4,000 to upgrade now!

Energy Upgrade California™ is a new program for property owners to find everything they need to make home improvements that save energy and water. The program connects you with Participating Contractors who can plan and complete your project—and get you rebates and incentives to help pay for it.


Take a “Whole House” Approach

Increasing your home's efficiency isn't just switching out light bulbs or buying new appliances. It's approaching your home as a complete system. Heating, air-conditioning, insulation, water and other systems can all work together to effectively reduce energy consumption and potentially help lower your utility bills. Energy Upgrade California connects you to the experts and resources you need to take a “whole house” approach.

Follow these steps for rebates and incentives now!

-  Visit the website to plan your upgrade
-  Work with your Participating Contractor
-  Complete your project
-  Get your rebate!

► www.EnergyUpgradeCA.org


Pacific Gas and Electric Company

Basic Package		Incentive
<ul style="list-style-type: none"> • Air sealing • Attic insulation • Duct sealing • Hot water pipe insulation • Low-flow showerhead with thermostatic control • Smoke alarms and carbon monoxide detectors • Combustion safety testing 	up to \$1,000	Choose from measures such as: <ul style="list-style-type: none"> • High-efficiency furnaces • Energy-efficient cooling systems • Energy-efficient water heaters • Wall insulation • Energy-efficient pool pumps • Dual pane energy-efficient windows • Cool roofs
approximately 10% energy savings	required 15%–40% energy savings	


Start your upgrade today: www.EnergyUpgradeCA.org


front

back

2.23.11 Printed on recycled paper

program fact sheet


Home Upgrade
 Energy Upgrade California™



Upgrade Your Business!

Energy Upgrade California can help you.

- **Market new services** to existing clients
- **Generate leads** to new clients
- **Grow your business** in a sustainable, energy-efficient marketplace
- **List your business** in the online Energy Upgrade contractor directory
- **Get trained** in the latest home performance standards
- **Gain access to marketing collateral**, including brochures, flyers, lawn signs and postcards

Expand Your Skills and Build New Business

Become an Energy Upgrade California Participating Contractor Today!

As an Energy Upgrade Participating Contractor, you are a critical part of this program. It's your expertise that allows homeowners make their properties more energy efficient.

How can I participate?

There are two ways to participate—become a Basic or an Advanced Upgrade Participating Contractor.


Basic Upgrade Participating Contractors must

- attend a free, three-day training about building science and the basic Upgrade package elements
- meet participating utility requirements found online at www.EnergyUpgradeCA.org/statewide_for_contractors

Advanced Upgrade Participating Contractors must

- attend a two-hour orientation about the program
- Have a Building Performance Institute (BPI) accreditation, or at a minimum employ one staff member that holds a BPI Building Analyst (BA) certification
- meet participating utility requirements found online at www.EnergyUpgradeCA.org/statewide_for_contractors

► www.EnergyUpgradeCA.org


SDGE
 Sempra Energy Utility

participating contractor fact sheet

PRINT ADVERTISING EXAMPLES: NEWSPAPER ADS

These are samples only, not for public use.



Is your house too **cold?**

brrrr...

Get up to **\$8,000 back** for home energy upgrades!

You might be **losing half your heated air** through leaky ducts!

Energy Upgrade California Home Upgrade can help you:

- Lower your utility bills
- Save energy
- Increase your home's comfort
- Get a greener home

Go to: **EnergyUpgradeCA.org**
877-785-2237




newspaper ad with county co-branding



我需要防寒的絕緣設備！

不要讓冷風流竄到屋內！

您可以獲得高達 **\$4,000** 的能源更新退款！

歡迎屋主前來參加我們的免費講座！有意者請上網報名！
報名網址: EnergyUpgradeAlamedaCounty.EventBrite.com

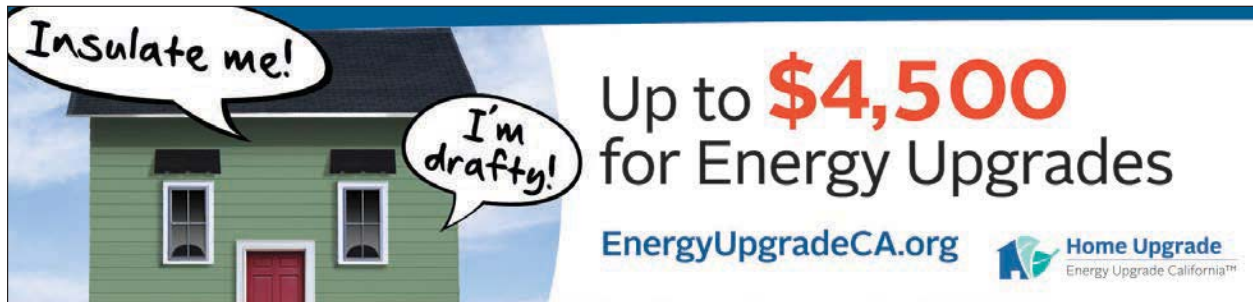
www.EnergyUpgradeCA.org
(855) 464-8484



chinese language newspaper ad with county co-branding

PRINT ADVERTISING EXAMPLE: BUS EXTERIOR

These are samples only, not for public use.



ONLINE ADVERTISING EXAMPLES: WEBSITE BANNERS

These are samples only, not for public use.



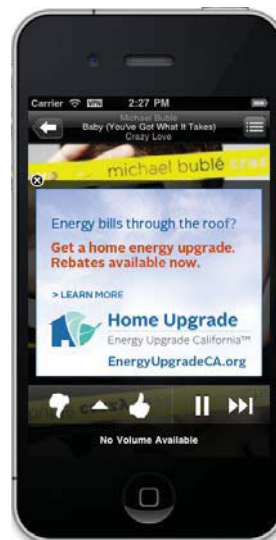
skyscraper, rectangle and leaderboard ads

ONLINE ADVERTISING EXAMPLE: PANDORA ADS

These are samples only, not for public use.



*pandora ads shown on desktop (above) and
mobile screen (right)*



PROMOTIONAL ITEM EXAMPLES

The Home Upgrade logo may be applied to promotional items and leisure wear following the guidelines set forth in this style guide. Note: Special art may have to be created in cases such as embroidery and other unique processes.

The color of the logo cannot be changed to match the color of any garment trim or piping (unless it is one of the approved colors as shown in the color palette of this guide).



notepads



pens



refrigerator magnets



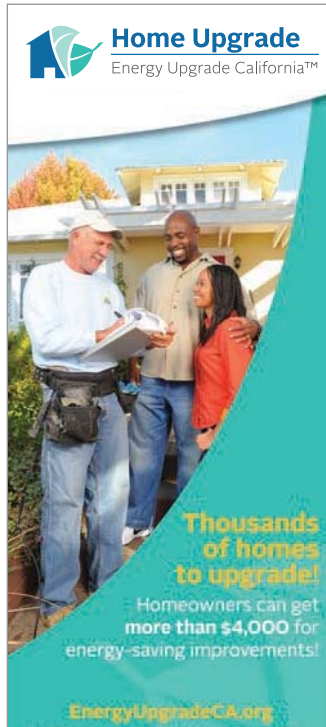
t-shirt



tote bag

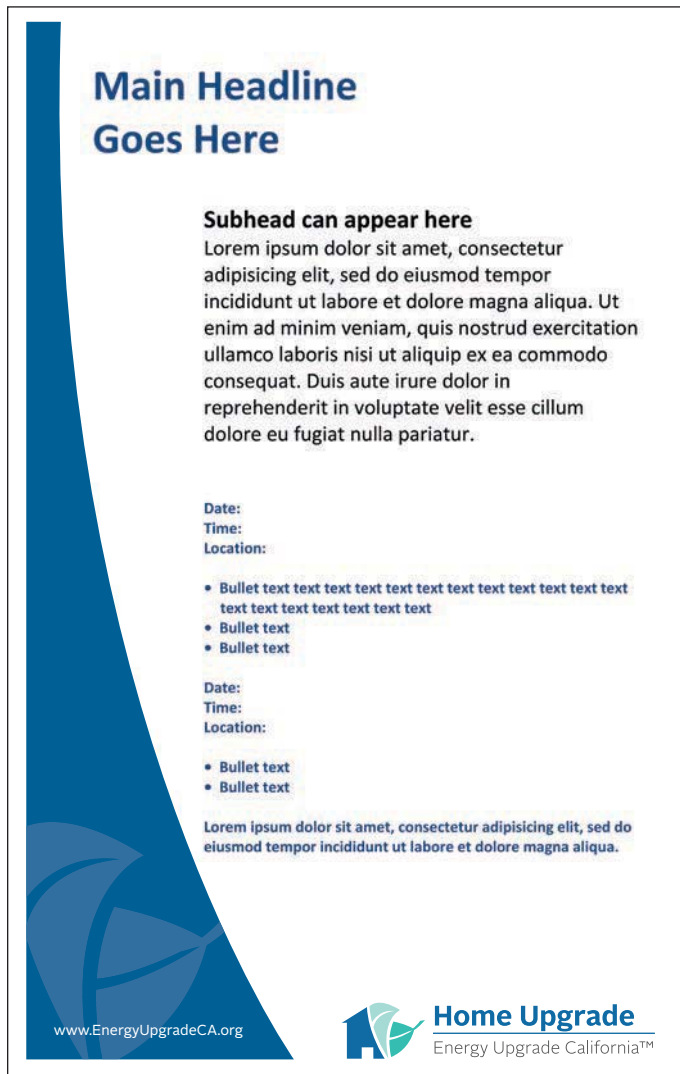
EVENT MATERIAL EXAMPLES

These are samples only, not for public use.



banners

TEMPLATE EXAMPLES: POSTER



poster

TEMPLATE EXAMPLE: POWERPOINT



4 | Appendices



Home Upgrade

Energy Upgrade California™



APPENDIX A

Brand Sublicense Agreement

TRADEMARK LICENSE

The California Public Utilities Commission (“CPUC”) and the California Energy Commission (“Energy Commission”), as joint owners of the ENERGY UPGRADE CALIFORNIA™ brand (the “Mark”) have licensed the exclusive rights to sublicense the Mark to the Center for Sustainable Energy (“CSE” or Licensor”).

Licensor grants to [company name] (“---” or “Licensee”) a non-exclusive, non-transferable, non-assignable royalty-free sub-license to use the trademark ENERGY UPGRADE CALIFORNIA in the approved form(s) provided by CSE in Exhibit A only in connection with promoting sustainable energy programs of the CPUC, CEC, Licensor, its affiliates and Licensee (the “Programs”) during the term of this Agreement.

A. Permitted Uses

Licensee may use, reproduce, display, and publish the Mark only for purposes of marketing or promoting the Programs.

B. Limitation on Uses

1. Licensee may not use the Mark in a manner that expresses or implies CPUC’s, Energy Commission’s or CSE’s endorsement, approval, favoring, or sponsorship of products, services, or websites.
2. Licensee may not use the Mark in a manner that suggests that Licensee’s products, services, or websites are CPUC’s, Energy Commission’s or CSE’s products, services, or websites.
3. Licensee may not use the Mark in a manner that damages, disparages, or diminishes the State of California, CPUC, Energy Commission, CSE or any of their programs or projects, including but not limited to uses that could be deemed obscene or that encourage unlawful activities.
4. Licensee may not sub-license or otherwise authorize any other party to use the Mark.
5. Licensee may not use the Mark as a feature or design element outside of the co-branding guidelines outlined in the ENERGY UPGRADE CALIFORNIA Home Upgrade Usage and Graphic Standards Guide.
6. Licensee may not use the Mark as a feature or design element outside of the co-branding guidelines outlined in the ENERGY UPGRADE CALIFORNIA Home Upgrade Usage and Graphic Standards Guide or in any trademark, service mark, service name or other indicia of origin.

7. Licensee may not alter the Mark in any manner, including proportions, colors, or elements, except as otherwise permitted in writing by CSE.
8. Licensee agrees that its use of the Mark will at all times be in accordance with the guidelines set out in the ENERGY UPGRADE CALIFORNIA Home Upgrade Usage and Graphic Standards Guide.
9. Licensee hereby acknowledges CPUC's and Energy Commission's exclusive right, title and interest in and to the Mark, and will not do anything to impair their exclusive rights in and to the Mark. Licensee shall not represent that Licensee has any ownership or other rights in the Mark and acknowledges that its use of the mark will not create in Licensee's favor any right, title or interest in or to the Mark.
10. Licensee will not seek to register the Mark or any confusingly similar variations in any jurisdiction without the express written permission of Licensor.
11. Licensee may not use any other CPUC, Energy Commission or CSE marks or logos without written permission.
12. Licensor may revoke Licensee's right to use the Mark at any time without prior notice and Licensee agrees that upon termination of this Agreement, Licensee shall cease and desist from all further use of the Mark.

C. Quality Control

Licensee shall maintain the distinctiveness of the Mark, the image of the brand, and the high quality of the services offered under the Mark. Licensee shall provide copies of its marketing materials displaying the Mark upon written request by CSE, or if not requested, every 6 months. The purpose of this request is to maintain the quality of the services provided under the Mark. To the extent representative material is publicly available on the Internet, providing a list of web addresses will meet this requirement.

EXHIBIT A

I. Guidelines for Proper Use of ENERGY UPGRADE CALIFORNIA™ Trademark When Promoting Home Upgrade

Please follow these guidelines whenever you use ENERGY UPGRADE CALIFORNIA™ in conjunction with Home Upgrade in internal and external marketing materials. These materials include all advertising and promotional materials, including online materials.

- A. Follow All Usage and Graphic Standards Outlined in the Document Titled ENERGY UPGRADE CALIFORNIA™ Home Upgrade Usage and Graphic Standards Guide.

(Contact Jeff Blanton at jeff.blanton@energycenter.org if you don't have copy of the guidelines.)

- B. Use ENERGY UPGRADE CALIFORNIA™ Home Upgrade when describing the home retrofit program. Never use ENERGY UPGRADE CALIFORNIA™ by itself to describe the home retrofit program.
- C. Use the ENERGY UPGRADE CALIFORNIA™ Trademark As Proper Adjective Followed by Home Upgrade. Trademarks should be used as adjectives followed by a modifier, and not as nouns or verbs. For example:
 - Correct: ENERGY UPGRADE CALIFORNIA™ Home Upgrade offers homeowners incentives for energy improvements that improve the comfort of the home and lower its energy use.
 - Incorrect: ENERGY UPGRADE CALIFORNIA™ is important.
- D. Do Not Use the ENERGY UPGRADE CALIFORNIA™ Trademark in the Possessive Form. Because trademarks are not nouns they should not be used in the possessive form, unless the trademark itself is in possessive form. For example:
 - Correct: We are increasing the advertising budget for ENERGY UPGRADE CALIFORNIA™ Home Upgrade's marketing.
 - Incorrect: We are increasing ENERGY UPGRADE CALIFORNIA™'s Home Upgrade advertising budget.
- E. Make the ENERGY UPGRADE CALIFORNIA™ Trademark Stand Out. Trademarks should be separate from surrounding text to emphasize their brand name significance.
 - In content capitalize the first letter of the trademark and the program name (for example, Energy Upgrade California™ Home Upgrade).
 - Presenting the trademark in its logo form, for example:



- F. Do Not Alter the ENERGY UPGRADE CALIFORNIA™ Trademark. Trademarks should be used consistently and should not be altered. For example, do not:
- Abbreviate the trademarks. (i.e. EUC HU, EUC Home Upgrade, Energy Upgrade CA Home Upgrade, etc.)
 - Change the colors or typeface of the trademarks. (see Brand Usage and Graphic Standards Guide for proper trademark usage)
 - Add words or design elements to the trademarks (i.e. regional designations, organizations names, program names, etc.). Example ENERGY UPGRADE CALIFORNIA™ Home Upgrade in Alameda County.
- G. Never Tie the ENERGY UPGRADE CALIFORNIA™ Home Upgrade to Any Offering, Promotion or Organization Without Proper Consent From CSE.
- H. Use Proper Trademark Notice Symbols. Proper trademark notice symbols should be used with the ENERGY UPGRADE CALIFORNIA™ trademark. In the U.S., the proper symbol to use depends on whether the trademark is registered with the U.S. Patent and Trademark Office (“USPTO”) for the specific products or services for which the mark is used:
- The ENERGY UPGRADE CALIFORNIA™ trademark is currently in the process of being registered with the USPTO so use the symbol “TM”.
 - Use the registered trademark symbol ® once the ENERGY UPGRADE CALIFORNIA trademark is registered with the USPTO.
- (Please see the ENERGY UPGRADE CALIFORNIA™ Home Upgrade branding guides for a list showing how the ENERGY UPGRADE CALIFORNIA™ Home Upgrade trademark should be displayed.)

II. Guidelines for Protecting the ENERGY UPGRADE CALIFORNIA™ Trademark Against Infringement and Misuse by Others

In addition to using the ENERGY UPGRADE CALIFORNIA™ trademark properly when promoting Home Upgrade, it is equally important that you protect the ENERGY UPGRADE CALIFORNIA™ trademark from infringement or misuse by others. Please follow these guidelines to help ensure that this brand remains protected.

- A. Report Suspected Infringements or Misuse of the ENERGY UPGRADE CALIFORNIA™ Trademark Including its use with Home Upgrade to Jeff Blanton at jeff.blanton@energycenter.org. Trademarks can be weakened or lost if a trademark owner does not take appropriate action against infringements or other misuses of his/her marks. It is important that action be taken quickly because undue delay can potentially limit legal remedies. Please immediately contact Jeff Blanton at jeff.blanton@energycenter.org if you become aware of:
- Any third-party use of the ENERGY UPGRADE CALIFORNIA™ trademark, or any similar trademarks, that you believe may violate CPUC/Energy Commission trademark rights.
 - Any third-party use of the ENERGY UPGRADE CALIFORNIA™ trademark in a generic sense, for example, by using the ENERGY UPGRADE CALIFORNIA™ trademark to refer to services generally and not services offered under the ENERGY UPGRADE CALIFORNIA™ trademark.
- B. Do Not Allow Others to Use the ENERGY UPGRADE CALIFORNIA™ Trademark Without Appropriate Internal Approval. Allowing third parties to use the ENERGY UPGRADE CALIFORNIA™ trademark when promoting Home Upgrade without proper control over the nature and quality of the use can jeopardize the marks and expose CSE and its partners to potential liability.

If a third party requests a license or permission to use the ENERGY UPGRADE CALIFORNIA™ trademark to promote Home Upgrade please have them contact Jeff Blanton at jeff.blanton@energycenter.org.

- C. Maintain Documents and Records Showing Use and Promotion of the ENERGY UPGRADE CALIFORNIA™ Trademark when Promoting Home Upgrade. Documents showing the use and promotion of the ENERGY UPGRADE CALIFORNIA™ trademark are important:
- In enforcement actions against third parties that infringe or misuse the trademarks.
 - In connection with registration and renewal of the trademarks.
 - Important documents to keep include:
 - Representative samples of product packaging displaying the ENERGY UPGRADE CALIFORNIA™ trademark when used to promote Home Upgrade.
 - Representative samples of advertising and promotional materials displaying the ENERGY UPGRADE CALIFORNIA™ trademark when used to promote Home Upgrade.

If you have any questions about the maintenance of these documents, please contact:

Jeff Blanton, Brand Manager
Center for Sustainable Energy
858-244-1177
jeff.blanton@energycenter.org

Name	Title	Signature	Date
Name	Title	Signature	Date
Name	Title	Signature	Date
Name	Title	Signature	Date



APPENDIX B

Single-Family Photography Library Usage and Standards

As Participating Contractors and Raters, city and county staff, and program partners and affiliates, you play a vital role in promoting the Energy Upgrade California™ Home Upgrade Program and generating homeowner awareness. To support your marketing efforts, pre-approved, professional photographs are available for Home Upgrade partners.

Using a consistent photography style that meets Home Upgrade's guidelines builds a recognizable brand identity and supports the overall marketing message. It can also increase homeowner awareness of the brand and their confidence in the program.

This collection of photographs captures the technical aspects of the measures, diagnostic testing and improvements associated with the Home Upgrade Program. Images include ducts and insulation, blower door and combustion safety testing, homeowner-contractor consultations and more.

Access

Photographs are available on the Resource Library—www.EnergyUpgradeCA.org/en/partners/partner-resources. To

access the library, use your assigned user name and password. (If you are an eligible user and have not received access to the library, please email jeff.blanton@energyupgradeca.org.) The collection is located in the “Photography” folder. For a quick thumbnail reference of the images, see “Single-family photography at-a-glance” on the following pages.



Non-stock-sourced photographs (most of those in this library) are available as 300 dpi JPEG files. This resolution is ideal for printed materials, such as advertisements, brochures and banners. For digital pieces, such as online advertisements and e-newsletters, down-size the files to 72 dpi.

Usage and rights






Images in the Home Upgrade photography library may be used by any Participating Contractor or Rater, state agency, city or county, or independent- or municipal-owned utility for the promotion of the Home Upgrade Program. Images can be reproduced in any medium for purposes of advertising, trade, display, exhibition or editorial use. Any use of this photography for purposes other than promotion of the Home Upgrade Program must be authorized in writing by Energy Upgrade California.

Some images in this collection are sourced from professional stock photography libraries. Thumbnail-sized images (with accompanying stock company watermark) are available for comping in the “Photography” folder. To legally use these images in any printed materials, they must be purchased from the stock company. If an image is stock-sourced, its website address and corresponding image numbers are provided in its catalog description.

Single-Family photography at-a-glance

	Image Number	Description
COMBUSTION SAFETY TESTING		
	001_ XL_168	Combustion safety test. Contractor using a monoxor to conduct combustion safety test on water heater.
	002_ XL_140a	Combustion safety test. Close-up of diagnostic smoke pencil test on a water heater diverter.
	003_ XO_277a	Combustion safety test. Contractor performing combustion safety test with monoxor on furnace.
	004_ XO_253a	Combustion safety test. Furnace with burners exposed.
	005_ XO_303a	Combustion safety test. Contractor performing combustion safety test on gas stove/oven.






Single-Family photography at-a-glance

	Image Number	Description
COMBUSTION SAFETY TESTING (cont'd)		
	006_ XO_282a	Combustion safety test. Close-up of combustion safety test performed on gas stove/oven exhaust. High carbon monoxide reading is shown.
	007_ XO_283a	Combustion safety test. Close-up of monoxor during combustion safety test on stove. Carbon monoxide reading is dropping as oven approaches steady state.
BLOWER DOOR TESTING		
	008_ XO_113a	Blower door test. Contractor educating homeowner in front of blower door.
	009_ XO_119a	Blower door test. Contractor educating homeowner in front of blower door.
	010_ XO_121a	Blower door test. Contractor operating blower door, adjusting manometer, fan exposed.




Single-Family photography at-a-glance

	Image Number	Description
BLOWER DOOR TESTING (cont'd)		
	O11_ XO_098a	Blower door test. Blower door equipment in place, fan covered, with manometer.
	O12_ XO_103a	Blower door test. Close-up of manometer attached to blower door frame with hoses in place.
INFRARED IMAGING		
	O13_ XO_190a	Infrared imaging. Infrared camera in homeowner's hands. Contractor points to and explains air leakage and unnecessary energy loss.
	O14_ XO_218a	Infrared imaging. Through window, homeowner with thermal imaging camera, contractor pointing out energy inefficiencies around window frame.
	O15_ XO_194a	Infrared imaging. Discovering phantom energy use among plugged-in adapters using thermal imaging camera.






Single-Family photography at-a-glance

	Image Number	Description
INFRARED IMAGING (cont'd)		
	016_ XO_138a	Infrared imaging. Image of infrared camera reading of floor vent. Shows cold air coming in from uninsulated duct in background.
	017_ XO_361a	Infrared imaging. Infrared camera showing cold air transmitting through window frame, but not through window.
DUCT INSPECTION		
	018_ XL_187	Duct inspection in attic. Contractor with proper protection equipment positioning an attic duct.
	019_ XL_202a	Duct inspection in attic. Contractor with proper protection equipment stepping up into an uninsulated attic.
	020_ XL_213a	Duct inspection in attic. Contractor stepping up into an uninsulated attic.






Single-Family photography at-a-glance

	Image Number	Description
DUCT INSPECTION (cont'd)		
	O21_XL_231a	Duct inspection in attic. View looking up into attic, contractor with proper protection equipment inspecting uninsulated attic.
	O22_XL_243a	Duct inspection in attic. Venting through ceiling with massive thermal bypass through attic floor. No fireblock in place. No air sealing completed. These are the things you want to fix!
	O23_XL_276a	Duct inspection in crawlspace. Contractor in crawlspace preparing to attach duct support and improve duct insulation.
	O24_XL_282a	Duct inspection in crawlspace. Contractor in crawlspace with flashlight to inspect duct strapping.
	O25_XL_002a	Duct inspection in crawlspace. Close-up of insulated flex duct in crawlspace.

Single-Family photography at-a-glance

	Image Number	Description
DUCT BLASTER TESTING		
	O26_XL_O91a	Duct blaster test. Close-up of manometer with duct blaster and testing fog in background.
	O27_XL_O96a	Duct blaster test. Manometer with duct blaster and testing fog in background.
	O28_XO_326a	Duct blaster test. Duct blaster attached to ceiling air return, contractor holding manometer in foreground.
	O29_XO_332	Duct blaster test. Duct blaster attached to ceiling air return, contractor holding manometer in foreground.
INSULATION		
	O30_NB_ATTIC	Insulated attic with duct.

Single-Family photography at-a-glance

	Image Number	Description
INSULATION (cont'd)		
	O31_IS_12437193	Contractor spraying insulation into wall. <u>Note:</u> This image is sourced from a professional stock photography library. A thumbnail-sized image is available for comp-ing only. To legally use this image in publication, it must be purchased from iStock.com , image number 12437193 .
	O32_PC_93125249	Contractor insulating walls with batted insulation. <u>Note:</u> This image is sourced from a professional stock photography library. A thumbnail-sized image is available for comp-ing only. To legally use this image in publication, it must be purchased from Photos.com , image number 93125249 .
	O33_PC_E000349	Contractor insulating walls with batted insulation. <u>Note:</u> This image is sourced from a professional stock photography library. A thumbnail-sized image is available for comp-ing only. To legally use this image in publication, it must be purchased from Photos.com , image number E000349 .
	O34_PC104102877	Duct inspection in crawlspace. Contractor insulating hot water pipes. <u>Note:</u> This image is sourced from a professional stock photography library. A thumbnail-sized image is available for comp-ing only. To legally use this image in publication, it must be purchased from Photos.com , image number 104102877 .
EXTERIORS		
	O35_PC_98703180	Exterior of second-story of California home. <u>Note:</u> This image is sourced from a professional stock photography library. A thumbnail-sized image is available for comp-ing only. To legally use this image in publication, it must be purchased from Photos.com , image number 98703180 .

Single-Family photography at-a-glance

	Image Number	Description
EXTERIORS (cont'd)		
	O36_PC_87770178	Exterior of second-story window of California home. <u>Note:</u> This image is sourced from a professional stock photography library. A thumbnail-sized image is available for comp-ing only. To legally use this image in publication, it must be purchased from Photos.com , image number 87770178 .
	O37_SS_6094540	Exterior of two-story California home. <u>Note:</u> This image is sourced from a professional stock photography library. A thumbnail-sized image is available for comp-ing only. To legally use this image in publication, it must be purchased from Shutterstock.com , image number 6094540 .
OTHER		
	O38_XO_003a	Product shot of exterior installation of tankless water heater.
	O39_IS_11803266	Programmable thermostat. <u>Note:</u> This image is sourced from a professional stock photography library. A thumbnail-sized image is available for comp-ing only. To legally use this image in publication, it must be purchased from iStock.com , image number 11803266 .
	O40_PC_105756352	Home with solar panels on roof. <u>Note:</u> This image is sourced from a professional stock photography library. A thumbnail-sized image is available for comp-ing only. To legally use this image in publication, it must be purchased from Photos.com , image number 105756352 .

