

# York Co-op



Effective January 1, 2024 to December 31, 2024  
PUBL-1199-YK-202401-A  
[www.york.com/dealers](http://www.york.com/dealers)





# Co-op

Advertising and promotions assist in raising awareness and promoting the position of our brand together and along side your company. Activities tied to this York co-op program allow for the delivery of our brand message on a local level and help drive customer exposure not only to the York brand (with our approved advertising or custom programs) but if done correctly will drive customers to your doorstep as well!

Contained within this document you will find details on best practices on using your York co-op funds, and the current York advertising policy.

## Who is eligible for York co-op?

- The only dealer programs that qualify for York co-op is a York Certified Comfort Expert and a Liberties Plus dealer.

- o CCE dealers earn **3.5%** co-op on all York residential purchases to be used at 50%
- o Liberties Plus dealers earn **2%** co-op on all York residential purchases to be used at 50%

- Once a dealer is enrolled in one of these co-op earning dealer programs, any York residential purchases at the date of the enrollment will be calculated into their co-op earnings. (Anyone that renews for the "Early Bird Special" that is due to be paid in full by December 15th will start earning co-op on January 1, 2024.)

- All 2024 co-op stops accumulating on December 31, 2024

- The latest date to submit a 2024 invoice for co-op reimbursement is January 15, 2025

- Co-op invoices **past 90 days** may not be submitted for co-op credit and **will be denied**.

- Only **25%** of your M&A co-op credit can be used on apparel and promo items (anything mass produced).

*Feel free to ask your Territory Manager for your latest M&A co-op balance!*

## Eligible Spend

Eligible activities are listed in the table below. All claims must include an invoice and evidence of York's brand promotion. The evidence of promotion may include photographs, samples of activity, or details of the promotion. Additional documentation may be required depending on the activity type.

Preferred vendor products and services may be eligible for a greater reimbursement rate than the standard of 50%. Refer to the Preferred Vendor Partner Network operating letter for more information.

Activity	Description	Additional Required Documentation
<b>Consumer or trade advertisement</b>	Space costs for ads and creative development. Radio and television – spot announcement costs for 10-, 15-, 20-, 30- and 60-second advertisements. Billboard and transit advertising – space costs.	Photo or copy of ad, and itemized invoices. Radio and television – copy of script
<b>Digital Advertising</b>	Search Engine Optimization, Search Engine Marketing, contractor websites, social media advertising, online reputation management, and fees from lead generation websites. <b>Now reimbursable at 75%!</b>	Expenses from online advertising vendors outside of the Preferred Vendor Network require preapproval from the Sales and Marketing Programs Department.
<b>Exhibits, displays and fairs</b>	Cost of exhibit space. When more than our products are displayed, only that portion of the display will be eligible for support funds.	Photo of exhibit space and displays, and itemized invoices.
<b>Identification Signs</b>	Building signage and retail merchandising signs.	Photo of materials and invoice
<b>Local consumer or direct trade mail</b>	Cost of postcards, mailing, and mailing lists.	Photo or copy of direct mail piece, confirmation from vendor that direct mail was sent, and itemized invoices.
<b>Training</b>	Approved training for distributor and contractor personnel related to the industry and/or brand. Ducted Systems Academy courses for contractors and distributors will be reimbursable at a higher co-op rate of 100%	Proof of attendance such as course invoice and description of the training.

Activity	Description	Additional Required Documentation
<b>Newspaper Advertising</b>	Space costs only in accredited daily, weekly and Sunday ABC (Audit Bureau of Circulations) papers.	Photo or copy of ad, and itemized invoices.
<b>Sales promotion materials</b>	Sales literature, videos, and sales presentations	Evidence of promotion of brand may vary. Provide explanation if required with invoices.
<b>Software</b>	Software from HVACBizPro, Pricebook Digital, Podium or other brand-designated software provider.	Evidence of promotion of brand may vary. Provide explanation if required with invoices.
<b>Charitable events and activities</b>	Sponsorship or volunteer work by distributors and/or contractors. This includes equipment donations for charitable causes.	Evidence of sponsorship agreement with mention of brand and/or any advertisements.
<b>Uniform apparel and or ad specialties</b>	Apparel and promotional items/giveaways. <b>Limited to 25% of your available M&amp;A co-op credit!</b>	Photo or artwork of materials and itemized invoice.
<b>Vehicle identification</b>	Decals and other vehicle identification materials.	Photo or artwork of materials and itemized invoice.

*Whether you are new to using co-op, or not, please refer to the following examples of ways to use these funds to help cover your marketing, sales or software needs.*

### **Advertising and Lead Generation**

- Use co-op funds for any one of the following types advertising campaigns: integrated brand awareness campaign that features the quality of the York brand or a disruptive product such as the HMM7, or a seasonal campaign promoting savings to the homeowner such as 0% or hassle-free financing and/or rebate savings on a new system install using our consumer rebates program.

## Digital Packages and Resources for Contractors

- Use co-op funds and work with our preferred vendor partners to create digital packages that will help win with the modern day homeowner. These can include a new website, social media management, Google Business Profile management, search engine optimization (SEO), search engine marketing (SEM) or a combination of these. As a reminder, digital marketing is reimbursable at a rate of 75%!
- Use YORK social media post templates in the Marketing Library and/or the Ad Builder located within Marketing Dashboard.
- Consider including business software by preferred vendor partners in your regional programs. These include online reputation management options, online proposal software options, and others.

## Image Identity Package

- Use co-op funds to create Brand Awareness
- This option can include vehicle wraps or decals, uniforms, door hangers, yard signs, etc.
- Leverage York's vendor partners for promotional items, signage, and identity, or use local vendors.

## Claims Processing

Distributor principals at JCI determine if a claim is approved for co-op reimbursement - it is not up to M&A.

### Submitting for Pre-Approval

Pre-approvals are required prior to the execution of any advertising activities outside of those created by YORK or the Preferred Vendor Partner Network. Pre-approvals are required to ensure proposed marketing activities meet YORK brand guidelines. They may also be used for suggested marketing activities not standard to what is outlined in this document. If the invoice has already been received, there is no need for a pre-approval and a claim should be submitted. **All claims that have not undergone the pre-approval process risk denial.**

1. Access the M&A Marketing Portal at [www.masupplymarketing.com](http://www.masupplymarketing.com)
2. Hover over the York header and click "York Co-op"
3. Click on the **Dealer PRE-APPROVAL CO-OP Form** to "Submit a Pre-Approval Request," and complete the required fields and attach the proof documents
4. Click on the "Submit Request" button.
5. Standard processing time is one business day. However, it is recommended that pre-approvals are submitted 3-4 business days prior to the date on which they are due to the vendor to allow for any adjustments that may be needed. Any resubmissions will likely incur an additional one business day in processing time.
6. If approved, you will receive a pre-approval email along with a pre-approval number. If denied you will have to make changes to your proof and resubmit for pre-approval again (following steps 1-5).
7. Approved pre-approvals
  - a. Pre-approvals are valid to use through the claim submission deadline for the year, January 15<sup>th</sup>, 2024. Even if there are no changes the following year, a new request must be made.
8. After the activity has occurred and expense incurred, you can "Submit a Co-op" in the **Dealer CO-OP Claim Form** located in the same area of the York Co-op section on the M&A Marketing Portal
9. Complete the requested information, such as pre-approval number, an invoice, evidence of payment, and evidence of promotion of the York product and brand.
  - a. It is important to note if the claim was pre-approved to ensure efficient processing. Even with pre-approval, required documentation is still mandatory.
  - b. Auditors may request clarification on activity and/or the documents provided to ensure compliance.
  - c. Be sure to break up different media activities on separate claim forms

**Claims are paid via credit towards your M&A account within 45 days of approval, not submittal. If your claim required multiple approvers and/or was up for "approval by manager", then the payment will occur after final approval.**

### Online-Exclusive Processing

Claims sent to individuals, via email, fax or physical mail will not be processed. For assistance filing a claim in the electronic process, please contact us at [marketing@masupplycompany.com](mailto:marketing@masupplycompany.com)

### Insufficient Funds

If your M&A co-op credit fund account does not have enough funds to cover the full reimbursement of the claim, a partial reimbursement based on available funds will be provided.

### Exceptions

All marketing funds are provided at the discretion of the JCI Ducted Systems Sales and Marketing Programs department. Exceptions to the policies outlined in this document must be approved. Pre-approval is the most efficient way of processing.

## **Program Terms and Conditions**

### Notice of Detailed Audit

Johnson Controls reserves the right to audit all spend affecting the funds outlined in this document.

### Rule Compliance

Reimbursement for spend for this program is contingent on compliance with established affiliated guidelines. Related guidelines may include the YORK brand guidelines, factory visit policy, and other sales and marketing programs operating letters. All these assets are available in Marketing Library. To ensure your claim is processed efficiently, users are encouraged to file for pre-approval. In addition, all spend must adhere to brand guidelines, properly represent the brand logo, not promote competitive brands, and have relevant evidence provided. Clarification may be provided by contacting [marketing@masupplycompany.com](mailto:marketing@masupplycompany.com)

### Distributor Eligibility

Participant must be an active and approved Distributor of Johnson Controls Ducted Systems products and have appropriate access to Solution Navigator.

### Claims

- Preapprovals and claims must be submitted via the Marketing Portal
- Qualifying spend must occur between January 1, 2024 to December 31, 2024.
- All claims for this program year must be submitted by January 15, 2025.
- Claims submitted by January 15, 2025 but marked incomplete must be fully resolved by February 1, 2025.
- Any and all unused 2024 co-op funds will not roll over into the next program year.
- Submitted claims are considered final and changes will not be made.
- Expenses may be determined as ineligible if they pose a potential risk to the organization or misrepresent the brand.
- JCI Ducted Systems Sales (not M&A Supply Company) retains final authority in determining if an expense is eligible for co-op reimbursement.

### Incentive Payouts

- Once a claim is approved and paid, reimbursements and payments are considered final.

## Ineligible Program Spend

- Advertising that displays competitive brands in ads or on promotional materials
- Politically affiliated spend
- Customer gifts or meals not aligned with a custom program
- Private label badges
- Computer software without preapproval
- Personal hotel rooms
- Transportation costs
- Travel expenses
- Truck painting or repairs
- Shipping, electrical or labor charges for displays and exhibits including telephone charges from exhibit
- Federal, state, and local sales and use taxes or surcharges
- Non-promotional office supplies such as price lists, speed memos, purchase orders, service orders, labels, or stationary
- Activity prohibited by local regulation or laws
- Prizes or incentives not related to HVAC equipment sales that reflect poorly upon JCI

## **Advertising Policy and Guidelines**

All distributor- and contractor-produced materials that do not originate from Marketing Library or Ad Builder must have prior approval to qualify.

### Website

- YORK logo clearly and prominently featured on home page
- List and show YORK products
- Logos appearing in photos on page including on trucks and uniforms are not considered sufficient
- If competitive brands are represented, YORK brand must have equal or greater prominence to qualify for co-op

### Online/Mobile/Digital

- YORK logo clearly and prominently shown on banner ads
- Copy-only based ads must include the use of the YORK brand name
- If online advertising directs to a website, that website should include the use of the YORK logo as referenced in the above section

### Social Media

- Organic and paid posts must mention YORK name
- Videos and imagery must show YORK logo

### TV/Video

- YORK needs to be represented both visually and audibly
- YORK logo should be clearly and prominently shown.
- Include at least one audible mention
- Pre-approval of storyboard and/or video file is required

### Radio

- All radio spots must audibly mention YORK
- Pre-approval of script required

### Billboards

- YORK logo clearly and prominently shown
- YORK logo must not appear with competitive brand logos
- Logo must be prominent and approximately 50% to the size of the contractor's logo

### Signage/Apparel/Promo Gifts

- YORK logo clearly and prominently shown
- YORK logo must not appear with competitive brand logos
- Logo must be prominently displayed

### Print and General Logo Requirements

- Prominently display YORK logo. Logo must be approximately 50% the size of the contractor's logo, but no greater than that
  - Logos appearing in photos are not considered sufficient.
- Advertising not specifically covered by this policy should have prior approval from Sales and Marketing Programs team

\*Advertising policy is subject to change at any time. Refer to YORK Brand Guidelines for further information on logo guidelines, including common logo misuses to avoid. **For the most recent brand guidelines, visit Marketing Library within SolutionNavigator.com.**