

BUSINESS DEVELOPMENT FUND GUIDELINES

REAL ESTATE PROFESSIONAL TRADE ALLY NETWORK

As a Real Estate Professional trade ally, you are eligible to receive partial reimbursement on Energy Trust of Oregon approved marketing projects that help promote you as a resource for energy efficiency and Energy Trust incentives to customers.

MESSAGING REQUIREMENTS

Energy Trust of Oregon must be referred to as “Energy Trust of Oregon” in first use, and “Energy Trust” thereafter. Energy Trust may not be referred to by its initials (ETO).

Do not use “partner,” “partnership” or “partnering” when associating Energy Trust with your business. Use, “trade ally of,” or “in collaboration with.”

Eligibility and reimbursement

As a Real Estate Professional Trade Ally, you are eligible to receive 30 percent reimbursement on approved marketing projects, up to \$500 per quarter—up to \$2,000 per year.

Eligible projects

The following marketing projects are eligible for cooperative marketing funds:

- Direct mail and flyers
- Business cards
- Events
- Websites—\$250 fixed annual reimbursement for one website per year. Website must feature Energy Trust required text and logo. Logo must hyperlink to the Existing Homes portion of Energy Trust’s website, www.energytrust.org/residential
- \$100 reimbursement for becoming an Energy Trust trade ally after becoming Earth Advantage S.T.A.R. certified

Exclusions and Ineligible Projects

Energy Trust’s logo and name may not be used on any classified listings, such as Craigslist and Angie’s List. Energy Trust logos are not permitted on trade ally vehicles or for use on your place of businesses. Energy Trust reserves the right to exclude use of Energy Trust’s trade ally logo or a trade ally marketing project at any time. Please contact the trade ally coordinator for more information.

Project Requirements

1. Required logo:

Energy Trust logos are available in four different color options and can be downloaded from www.energytrust.org/ta

2. Required text:

“As a trade ally of Energy Trust of Oregon, I can tell you about energy-efficient features and improvements for your home.”

3. In addition, the project must contain energy-efficiency messaging, such as:

- “Save money, save energy with Energy Trust of Oregon.”
- “We can help make your home and environment better through energy efficiency.”
- “Please ask about Energy Trust of Oregon’s cash incentives.”
- “Save up to 30% on energy costs with Energy Trust of Oregon cash incentives.”
- “Visit www.energytrust.org to learn more ways to make your home energy efficient.”
- “Visit www.energytrust.org to learn more about Energy Trust of Oregon cash incentives.”

Steps to Receive Business Development Fund Reimbursement

1 Apply.

Submit a Business Development Fund agreement and a Substitute W-9 form, available online at www.energytrust.org/ta. Fax the signed agreement and Substitute W-9 form to the trade ally coordinator at 1.866.516.7592 or email it to existinghomesdevelopmentfund@energytrust.org. Your trade ally coordinator can also be reached directly at 1.866.365.3526 option 4.

2 Request approval.

Before releasing your marketing project, be sure to email or fax a draft—complete with logo and required text—to the trade ally coordinator. You will receive written approval or edits within three business days of submission. Marketing pieces that are not pre-approved by Energy Trust will not be eligible for Business Development Funds.

Logos can be downloaded from www.energytrust.org/ta.

3 Produce your marketing materials.

After receiving Energy Trust's written approval on your design draft, you may move forward with the production of your marketing project. Be sure to obtain a copy of the final piece. If it's an advertisement, ask for a tearsheet as proof of placement.

4 Submit for payment.

After your marketing project has been released to the public, submit an invoice for print and production costs* within 15 days of the original invoice date, and one of the following:

1. A copy/tear sheet of produced marketing project for print materials, brochures, direct mail, Yellow Pages or business cards.
2. A photo of the produced outdoor billboard, event space and/or display, apparel/clothing or mass transit advertising.
3. An air-check for radio and television advertisements.

Conservation Services Group will issue reimbursement checks paid to participating trade ally contractors within 30–45 business days of receiving all required materials. Funds are limited on a first-come, first-served basis. Business Development Fund amounts are subject to change.

**Energy Trust cannot pay designers, printers or other suppliers directly.*