

BUSINESS DEVELOPMENT FUND GUIDELINES

EXISTING HOMES

Existing Homes trade allies are eligible to receive partial reimbursement on Energy Trust of Oregon approved marketing projects and trainings which help promote you as a resource for energy efficiency, Energy Trust incentives, and provide you with a range of opportunities to improve your business and support growth.

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.”

Cooperative Marketing Eligible Projects

The following pre-approved marketing projects are eligible for Business Development Funds:

- Print, radio and television advertisements
- Outdoor billboard advertising, yard signs and window stickers
- Event space and displays
- Brochures, direct mail, Yellow Pages and business cards
- Apparel/clothing—shirts, hats, jackets
- Website—Energy Trust offers an annual \$250 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.

Exclusions and Ineligible Projects

Energy Trust’s logo and name may not be used on any classified listing, such as Craigslist or Angie’s List. Energy Trust logos are not permitted on trade ally vehicles or for use on your place of business. 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 black and white and can be downloaded from www.energytrust.org/ta

2. Required text:

“As a trade ally contractor of Energy Trust of Oregon, we can help with cash incentives and state energy tax credits to improve the energy efficiency of 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.”

Language and Messaging Requirements

Incentives and tax credits

- Do not refer to Energy Trust cash incentives as “rebates.” They are “incentives” or “cash incentives.”
- Tax credits may not be referred to as cash incentives. If advertising or promotion refers to tax credits in combination with Energy Trust cash incentives, they must be referred to as tax credits and cash incentives. Example: “Energy-efficiency improvements may qualify for tax credits and incentives totaling \$2,500.”
- If advertising or promotion refers to the percentage of cost savings available through tax credits and incentives, it must include the words “up to.” Example: “Up to 50 percent of system cost can be covered by tax credits and incentives.”

Energy Trust Of Oregon

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

Multiple Energy Trust program participation

If you are a trade ally for more than one Energy Trust program, you may receive cooperative marketing funds from only one program for a single marketing piece; no piece shall receive funding from more than one program. A trade ally participating in more than one cooperative marketing program is eligible for the maximum yearly cap from each program. Please contact each program’s trade ally coordinator for more information.

Eligibility

Trade allies receive a one-, two- or three-star rating based on job volume, location, quality control pass rate and quality of customer service. Business development fund reimbursement is based on your current trade ally rating.

Training and Continuing Education

The following pre-approved classes are eligible for business development funds:

- Training and workshops sponsored by Energy Trust, listed on the Training & Education Calendar at www.energytrust.org/ta
- Construction Contractors Board, or CCB, continuing education—core continuing education unit classes
- Conferences with Building Performance Institute, or BPI, or CCB core continuing education

For additional options, contact the trade ally coordinator at existinghomesta@energytrust.org.

Trade Ally Business Development Fund

Rating	Quarterly Cap	Cooperative Marketing	Training
★★★	\$2,000 per quarter	Up to 30 percent reimbursement on qualifying pre-approved projects which meet requirements	Up to 50 percent reimbursement on approved continuing education; maximum of \$200 per training
★★	\$1,000 per quarter	Up to 30 percent reimbursement on qualifying pre-approved projects which meet requirements	Up to 30 percent reimbursement on continuing education; maximum of \$100 per training
★	\$250 per quarter	Can have projects pre-approved, but are not eligible for reimbursement	Up to 30 percent reimbursement on continuing education; maximum of \$100 per training
NO STARS	\$100 per quarter*	Can have projects pre-approved, but are not eligible for reimbursement	Up to 30 percent reimbursement on continuing education; maximum of \$100 per training

*Trade allies with no star rating or who are not yet rated can receive up to \$100 per quarter for training only during the first year, or until they reach a starred level at quarterly review periods.

Trade allies with a three-star rating are also eligible to have their promotions, limited-time offers and coupons posted to Energy Trust’s promotions web page at www.energytrust.org/promotions. Email a description of your promotion—including start and end dates—to existinghomesdevelopmentfund@energytrust.org. We will link to your website where customers will receive additional details about your promotion and company.

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 or attending a training, be sure to request pre-approval.

- Marketing project requests can be sent by email or fax a draft—complete with logo and required text—to the trade ally coordinator.
- Training or continuing education requests can be sent by emailing a description of the training or calling the trade ally coordinator.

You will receive written approval or edits within three business days of submission. Marketing pieces and trainings which 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 or attend your training.

After receiving Energy Trust's written approval on your design draft or training, you may move forward with the production of your marketing project or attend your class.

- **Cooperative marketing pieces**—be sure to obtain a copy of the final piece. If it's an advertisement, ask for a tearsheet as proof of placement.
- **Training**—be sure to obtain a copy of the receipt or invoice from the class along with a certificate of completion.

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.

To receive a training reimbursement, submit a copy of the invoice or receipt for the class within 15 days of the original invoice date and a certificate of completion.

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.*