

TRADE ALLY BUSINESS DEVELOPMENT FUND



**EXISTING BUILDINGS, NEW BUILDINGS, COMMERCIAL & INDUSTRIAL LIGHTING,
STREAMLINED INDUSTRIAL AND EXISTING MULTIFAMILY**

Energy Trust of Oregon's business development fund reimburses trade allies for a portion of their marketing investment to promote Existing Buildings, New Buildings, Commercial & Industrial Lighting, Streamlined Industrial or Existing Multifamily projects. These funds may be used for advertising (newspaper, magazine, radio, television, phone book and billboards), website design and development, brochures, business cards and other approved marketing pieces and opportunities.

REQUIREMENTS AND REIMBURSEMENT

Requirement	Reimbursement	Cap
Placement of "Trade Ally of Energy Trust" logo	33% of allowable marketing costs	Up to \$15,000 per year, subject to budget limitations

STEP 1: APPLY

Design your marketing piece following the requirements provided below. Contact Energy Trust to request the "Trade Ally of Energy Trust" logo for use in your piece. Send your piece along with this completed form to the trade ally coordinator for pre-approval (contact information below). You will receive confirmation of receipt within three business days of submission. Please allow a minimum of two weeks for marketing review. Projects requiring revisions must be edited and resubmitted for final approval. **Unless Energy Trust expressly pre-approves the marketing piece, it cannot include Energy Trust's logo and will not be eligible for business development funds.**

Campaign Ally Company Name _____

Contact Name _____

Phone _____ Fax _____ Email _____

Type/Description of Marketing Piece _____

Estimated Cost of Marketing Piece \$ _____ Date(s) the piece will run in publication _____

The maximum amount that Energy Trust will provide towards pre-approved marketing pieces promoting one or more of the programs listed on this application is limited to the cap amount listed. This is a combined cap; not a per-program cap. If you are seeking Energy Trust business development funds for a marketing piece via any other Energy Trust business development funding opportunity (for example, solar or residential), then it is **not** eligible for submission or funding under this application. Please talk to your program business development coordinators for more information.

STEP 2: PRODUCE YOUR MARKETING MATERIALS

After receiving pre-approval, place your advertisement or produce your final marketing materials. Be sure to obtain a copy of the final piece. If it's an advertisement, ask for a tearsheet as proof of placement.

STEP 3: SUBMIT FOR PAYMENT

Send a copy of your completed marketing piece or ad and a copy of the invoice(s) for design, print and/or placement within 60 days of its completion, along with trade ally's completed Energy Trust Substitute W-9 form (available at www.energytrust.org/library/forms/lgl_fm0214_substituteW9.pdf) or IRS Form W-9. Energy Trust cannot pay your designers, printers, or other suppliers directly. Reimbursement checks will be mailed to the trade ally's company within 60 days of receiving all required information. Energy Trust is not responsible for any tax liability that may be imposed on trade ally as a result of its receipt of any business development funds.

AGREE TO TERMS

I would like to participate in this Energy Trust business development fund opportunity. I have read, understand and agree to the terms and conditions of participation listed herein, including but not limited to the requirements that my marketing materials must adhere to the logo and messaging guidelines listed herein. I further understand and agree that, unless my proposed material has received Energy Trust's specific pre-approval, I do not have permission to use such logo and the material shall not be eligible for any Energy Trust business development funding.

Signature _____ Date _____

SEND COMPLETED FORMS TO:

Ashley Prentice
Energy Trust of Oregon
421 SW Oak St., Suite 300, Portland, Oregon 97204

Phone: 503.459.4070
Fax: 503.200.1207
Email: ashley.prentice@energytrust.org

ENERGY TRUST LOGO REQUIREMENTS

Clear space and placement: The "Trade Ally of Energy Trust" logo must be included on all pieces and should be smaller than the trade ally company's logo. Space surrounding the "Trade Ally of Energy Trust" logo at all times is determined by the size of the "burst" symbol of the logo, as shown below. Preferred placement is the lower right corner of the ad if possible. The trade ally logo may only be used in black or in white against a solid color background.



Marketing pieces must use high-resolution logos provided by Energy Trust.

Text references: In text, trade allies may use the terminology "an approved trade ally of Energy Trust of Oregon" or "a trade ally of Energy Trust of Oregon."

Websites: If a trade ally website is co-branded, the page(s) that mention Energy Trust must include a link to the appropriate Energy Trust web page.

Apparel: Apparel design must be approved by Energy Trust before production.

- **Logo placement:** For shirts, place "Trade Ally of Energy Trust" logo on the left chest or sleeve. For hats, place logo above brim or across back.
- **Apparel colors:** On light colors, use the black "Trade Ally of Energy Trust" logo. On dark colors, use the white logo.

Exclusions: The "Trade Ally of Energy Trust" logo may not be used on vehicle signs.

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: "Solar systems 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 covered by tax credits and incentives."**

Net-metering

- Net-metering is designed to offset energy costs, not to allow customers to become energy wholesalers. Language must conform to that idea.

Energy Trust and Oregon Department of Energy

- Energy Trust of Oregon must be referred to as "Energy Trust of Oregon" on first sentence, and "Energy Trust" thereafter. Energy Trust may not be referred to by its initials (ETO).
- **Oregon Department of Energy should not be referred to as ODOE.**