

BUSINESS DEVELOPMENT FUND

SOLAR

PRE-APPROVAL APPLICATION

If approved, Energy Trust of Oregon's Business Development Fund reimburses trade allies for a portion of their training, equipment, and marketing investment. Allies may use these funds for approved marketing project projects, approved equipment and trainings described in the Business Development Fund Guidelines. Final determination of reimbursement shall rest solely with Energy Trust.

Trade ally/company name: _____ Date: _____

Contact name: _____ Phone: _____ Email: _____

Marketing Projects

Send a draft of your project for pre-approval with this completed form (contact information below). You will hear back from us 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. **Pre-approval is required for reimbursement.**

Type of marketing project (select one):

- | | | |
|--|------------------------------------|--|
| <input type="checkbox"/> Print ad | <input type="checkbox"/> Online ad | <input type="checkbox"/> Direct mail |
| <input type="checkbox"/> Radio ad | <input type="checkbox"/> Yard sign | <input type="checkbox"/> Native Advertising/Advertorials |
| <input type="checkbox"/> Television ad | <input type="checkbox"/> Brochure | <input type="checkbox"/> Website (URL _____) |

Description: _____

Estimated cost: \$ _____ Quantity/impression: _____

Date(s) in the market: _____

Estimated size: _____

Equipment

Energy Trust will reimburse for equipment related to battery energy storage system installation. Send a description of the equipment with this form (contact information below). Please allow a minimum of two weeks for equipment application review. **Pre-approval is required for reimbursement.**

Equipment description: _____

Cost: \$ _____ Quantity: _____

Equipment, Products & Services

Select product(s) and/or service(s) and provide a detailed description of the business need for requested products or services. Please allow a minimum of two weeks for product and services review. **Pre-approval is required for reimbursement.** For products or services not listed below please submit pre-approval application as stated for consideration.

Type of equipment, product or service:

Indicate what equipment, product, or service being requested for reimbursement.

- | | | |
|---|---|---|
| <input type="checkbox"/> Software (Business/Accounting/
Bidding/ Project management) | <input type="checkbox"/> Certification / Re-certification | <input type="checkbox"/> Consulting (financial, business,
marketing) |
| <input type="checkbox"/> Trade specific tools | <input type="checkbox"/> Licensing | <input type="checkbox"/> Office / Building Maintenance |
| <input type="checkbox"/> Computer/Laptop/Tablet | <input type="checkbox"/> Payroll Services | <input type="checkbox"/> Office / Building Expansions |
| <input type="checkbox"/> Printing supplies | <input type="checkbox"/> Website Development | <input type="checkbox"/> Other |

(more on opposite page)

Description: _____

Business need/purpose: _____

Estimated cost: \$ _____ Quantity: _____

Training

Send a description of your training for pre-approval with this completed form (contact information below). Please allow a minimum of two weeks for application review. **Pre-approval is required for reimbursement.**

Course Title: _____

Description: _____

Date: _____ Cost/Registration Fee: \$ _____ Number of staff attending: _____

Apparel

Energy Trust will continue to reimburse for apparel in 2023.

Description: _____

Cost: \$ _____ Quantity: _____

Personal Protective Equipment (PPE)

Energy Trust will continue to reimburse qualified PPE purchased from January 1, 2023 to December 31, 2023. **Please include an itemized copy of your invoice** that lists the items purchased along with the cost. **Qualified PPE purchases do not require preapproval but please include this application with your invoice for processing.**

SEND COMPLETED FORMS TO:

solarfund@energytrust.org

