

BUSINESS DEVELOPMENT FUND

RESIDENTIAL

PRE-APPROVAL APPLICATION

Energy Trust of Oregon's Business Development Fund reimburses trade ally contractors for costs related to business operations, trainings, certifications, marketing, consulting services and more. For a detailed description of eligible costs, please review the Business Development Fund Guidelines found at www.energytrust.org/homesbdf.

Pre-approval is required for reimbursement except for Personal Protective Equipment (PPE). Prequalification confirms product and services eligibility but does not reserve funds; funds are on a first-come, first-served basis.

We urge you to continue with this application for pre-approval consideration even if this application does not list the specific reimbursement need. Energy Trust will review ALL applications submitted for eligibility.

Trade ally/company name: _____ Date: _____

Contact name: _____ Phone: _____ Email: _____

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 the pre-approval application as stated for consideration. Trade allies are eligible for a 10% discount for equipment purchased from participating vendors.

For a list of participating vendors, please go to the following link:

insider.energytrust.org/programs/home-retrofit/business-development-fund/#other-offers

Type of equipment, product or service:

Indicate what equipment, product or service is 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 _____ |
| | <input type="checkbox"/> Insurance | |

Description: _____

Business need/purpose: _____

Estimated cost: \$ _____ Quantity: _____

Personal Protective Equipment (PPE)

Energy Trust will reimburse qualified PPE purchased from January 1, 2024 to December 31, 2024. Please include an **itemized** copy of your invoice that lists the items purchased along with the cost. **Qualified PPE purchases do not require pre-approval, but please include this application with your invoice for processing.**

Please choose which program this marketing project is promoting:

Wearable PPE:

- Disposable gloves
- Disposable masks
- Disposable booties
- Disposable coveralls

Sanitizing and prevention:

- Hand sanitizer
- Disinfecting wipes
- Hand wash station
- Thermometer

Social distancing equipment:

- Social distance signage
- Social distance marking tape

Training/Continuing Education/Membership

Send a description of your training or educational event for pre-approval with this completed form (contact information below). Please allow three business days for application review. Pre-approval is required for reimbursement.

Course Title/Training Event/Membership Organization: _____

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

Business need: _____

Web link/Event Host: _____

Marketing Projects

Email a draft of your project for pre-approval with this completed form (contact information below). 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.** Pre-qualification confirms project and training eligibility but does not reserve funds; funds are on a first-come, first-served basis. *For marketing projects not listed below please, submit the pre-approval application as stated for consideration.*

Type of Marketing Project:

- | | | | | |
|-----------------------------------|--|------------------------------------|---|---------------------------------------|
| <input type="checkbox"/> Print ad | <input type="checkbox"/> Television ad | <input type="checkbox"/> Yard sign | <input type="checkbox"/> Direct mail | <input type="checkbox"/> Bilingual ad |
| <input type="checkbox"/> Radio ad | <input type="checkbox"/> Online ad | <input type="checkbox"/> Brochure | <input type="checkbox"/> Business cards | <input type="checkbox"/> Other _____ |

Description: _____

Estimated cost: \$ _____ Quantity/impression: _____

Date(s) in the market: _____

Estimated size: _____

Oregon or Washington counties where your marketing project will be distributed: _____

SEND COMPLETED FORMS TO:

homesfund@energytrust.org

Call **1.866.365.3526 option 4** for more information.

