

BUSINESS DEVELOPMENT FUND

RESIDENTIAL

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 additional requirements and eligible cost details, please review the Business Development Fund Guidelines found at www.energytrust.org/homesbdf.

Pre-approval is required for reimbursement of all of the below application items, except for Personal Protective Equipment (PPE). Pre-approval confirms product or service eligibility but does not reserve any funds. Funds are available on a first-come, first-served basis, and are subject to budget availability and annual Business Development Funds per-trade ally, per-program limits. If not listed below, you can still submit this application to propose a product or service for our consideration*. Energy Trust will review ALL applications submitted.

Energy Trust requires at least two weeks to review application requests, so please submit your proposed item for our eligibility review with this timeframe in mind.

* Legal fees or costs associated with lobbying or advocacy are not eligible.

PRE-APPROVAL APPLICATION

Trade ally/company name: _____ Date: _____

Contact name: _____ Phone: _____ Email: _____

Equipment, Products & Services

Provide a detailed description of the business need for each equipment, product, or service selected below. Please allow a minimum of two weeks for Energy Trust's review of your request. Invoice documentation itemizing actual costs of any pre-approved equipment, products, or services will be required for reimbursement. Trade allies may qualify for a 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 being requested for reimbursement:

- | | | |
|--|---|--|
| <input type="checkbox"/> Software (Business/Accounting/
Bidding/Project management) | <input type="checkbox"/> Certification/Re-certification | <input type="checkbox"/> Consulting
(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: _____

Training/Continuing Education/Membership

Provide a description of your proposed training, continuing education event, and/or membership and business need below (see the Business Development Fund Guidelines for more information about qualifying training, continuing education events, and memberships). Please allow three business days for Energy Trust's review of your request. Pre-approval is required for reimbursement. Invoice documentation itemizing actual costs of any **pre-approved training, continuing education, or memberships will be required for reimbursement.**

Course Title/Training Event/Membership Organization: _____

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

Business need: _____

Web link/Event Host: _____

If requesting additional **Event Attendance Assistance** for an in-person training or continuing education event listed above, fill out the attendee information below. **If not already on file, Energy Trust must receive an accurate, verifiable W9 from trade ally before Event Attendance Assistance funds can be processed. Event Attendance Assistance requests for payment must be submitted to Energy Trust at the same time as the event invoice documentation.**

Event Attendance Assistance

If trade ally's event above is pre-approved, you can request additional **Event Attendance Assistance** funds, on a per-attendee basis, for up to four of trade ally's attendees, based on the following criteria. To be eligible, the attendee listed must perform trade ally work in Energy Trust's service area, and must attend the pre-approved event in-person:

- **\$75/per attendee** (event located 50-99 miles from trade ally's OR/WA business location where attendee works)
- **\$150/per attendee** (event located 100-149 miles from trade ally's OR/WA business location where attendee works)
- **\$250/per attendee** (event located more than 150 miles from trade ally's OR/WA business location where attendee works)

Complete all of the following information for up to four of trade ally's attendees for the event listed above):

Attendee 1 name: _____ Email: _____ Miles Traveled: _____

Starting Location: _____ Ending Location: _____

Attendee 2 name: _____ Email: _____ Miles Traveled: _____

Starting Location: _____ Ending Location: _____

Attendee 3 name: _____ Email: _____ Miles Traveled: _____

Starting Location: _____ Ending Location: _____

Attendee 4 name: _____ Email: _____ Miles Traveled: _____

Starting Location: _____ Ending Location: _____

Marketing Projects

Provide a draft of your proposed marketing project, along with this form, for pre-approval. Projects requiring revisions must be edited and resubmitted for final approval. **Pre-approval is required for reimbursement.** Invoice documentation itemizing actual costs of any pre-approved marketing project will be required for reimbursement.

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: _____

Business Development Funds Application Terms and Conditions

Limited to one Energy Trust Business Development Fund application per reimbursement request. Additional eligibility requirements may apply – see applicable Business Development Fund Guidelines for more information. This application is subject to the terms and conditions of the trade ally enrollment agreement between trade ally and Energy Trust. Energy Trust must receive all requested documentation by communicated due dates to enable payment processing; failure to deliver all requested information may result in payment delay or cancellation. Final determination of eligibility for Energy Trust funding rests solely with Energy Trust. Energy Trust is not responsible for any tax liability imposed on trade ally applicant as a result of payment of any funds in connection with this application. Energy Trust is not providing tax advice, and any communication by Energy Trust is not intended or written to be used, and cannot be used, for the purpose of avoiding penalties under the Internal Revenue Code.

SEND COMPLETED FORMS TO:

homesfund@energytrust.org

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