



# Business Development Funds and COBID-Certification

## Business Lighting Trade Ally Webinar

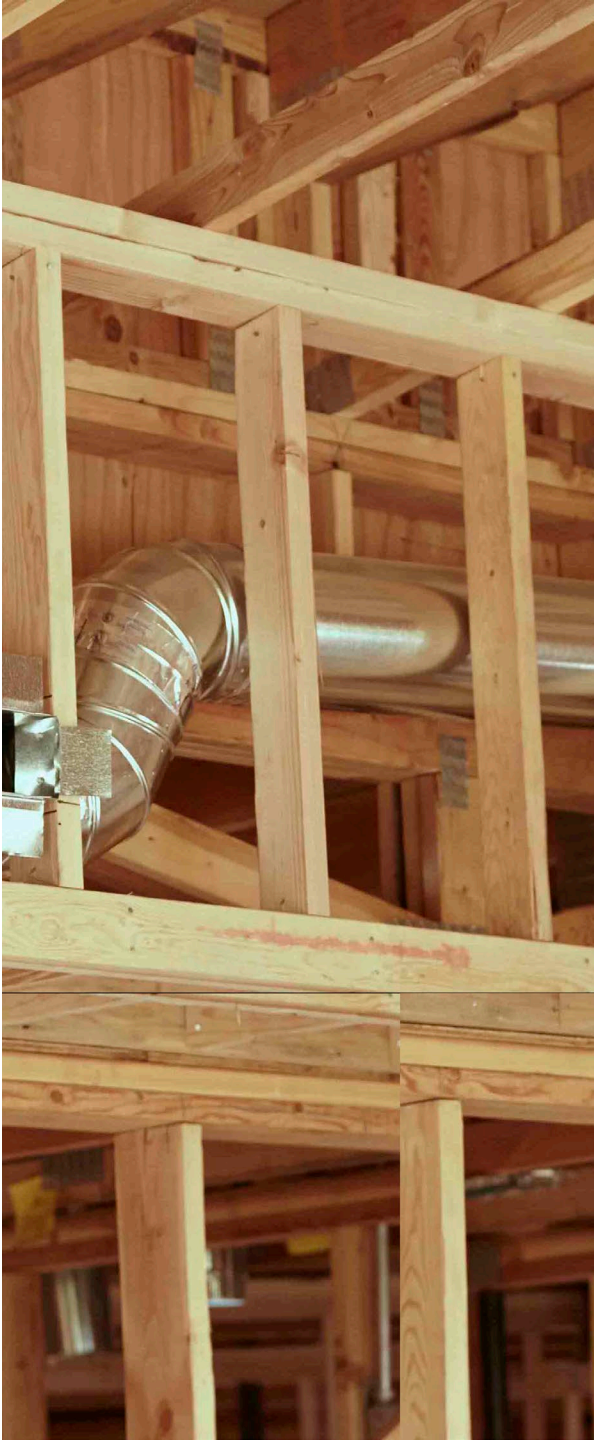
January 18, 2021

# Agenda

- Business Development Fund Guidelines
  - Reimbursement
  - Logo and Messaging
  - Other Offers
- Certification Office for Business Inclusion and Diversity (COBID)



# **Business Development Funds**



## Benefits for Trade Allies

- Listing in our online Find-a-Contractor tool
- Referrals from Energy Trust
- Participation in exclusive program offerings
- Business development funds
- Specialized training and events
- Electronic payment

# Business Development Fund Overview

- Available only to trade allies
- Reimbursement for a portion of approved marketing materials and trainings
- Available through multiple Energy Trust programs
- Win-win: builds referrals for trade allies and customer awareness for Energy Trust
- Visit [Insider](#) to learn more



# Business Development Funds

<b>Standard trade ally</b>	<b>MBE, WBE, VBE &amp; Rural trade ally</b>
<p>\$3,000 max per year 30% reimbursement</p> <ul style="list-style-type: none"><li>• 50% for bilingual advertisements</li><li>• See program representative for details</li></ul>	<p>\$4,000 max per year 50% reimbursement</p> <ul style="list-style-type: none"><li>• See program representative for details</li></ul>
<p>Minimum reimbursement:</p> <ul style="list-style-type: none"><li>• \$75 for marketing</li><li>• \$75 for training</li></ul>	<p>Minimum reimbursement:</p> <ul style="list-style-type: none"><li>• \$75 for marketing</li><li>• \$75 for training</li></ul>



# Eligible Reimbursements

## Marketing

- Print (direct mail, newspaper, magazine)
- Online (banner ad, pay-per-click, social media sponsored posts)
- Broadcast (radio and TV ad)

## Professional Development

- Training/certification (membership dues, conferences, CCB CEUs)
- Staff support (tablets and equipment discounts)

## Personal Protective Equipment

- Disposable gloves, masks, booties, coveralls, etc.

## BUSINESS DEVELOPMENT FUND

COMMERCIAL & INDUSTRIAL LIGHTING, EXISTING BUILDINGS,  
EXISTING MULTIFAMILY, NEW BUILDINGS AND PRODUCTION EFFICIENCY

### PRE-APPROVAL APPLICATION

Energy Trust of Oregon's Business Development Fund reimburses trade allies for a portion of their training and marketing investment. Allies may use these funds for approved marketing projects and trainings described in the Business Development Fund Guidelines.

Trade ally/company name: \_\_\_\_\_ Date: \_\_\_\_\_  
Contact name: \_\_\_\_\_ Phone: \_\_\_\_\_ Email: \_\_\_\_\_

### Personal Protective Equipment (PPE)

Energy Trust will reimburse qualified PPE purchased from March 1, 2020 to December 31, 2020. 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.**

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

### 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.**

Please choose which program this marketing project is promoting:

- Commercial & Industrial Lighting
- Existing Buildings
- Existing Multifamily
- New Buildings
- Production Efficiency

Type of marketing project (select one):

- Print ad
- Online ad
- Direct Mail
- Radio ad
- Yard sign
- Native Advertising/ Advertorials
- Television ad
- Brochure
- Website (URL \_\_\_\_\_)

Description: \_\_\_\_\_

Estimated cost: \$ \_\_\_\_\_ Quantity/impression: \_\_\_\_\_ Date(s) in the market: \_\_\_\_\_

Estimated size: \_\_\_\_\_

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

### Training

Send a description of your training 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: \_\_\_\_\_

**SEND COMPLETED FORMS TO:**

commercialfund@energytrust.org

Call 1.866.365.3526

9/2020



# Steps for Reimbursement



Request pre-approval

The first step is represented by a white circle with a thin black outline, connected to a dark grey horizontal bar. The text 'Request pre-approval' is written in white on the bar.



Produce your marketing material or attend your training

The second step is represented by a white circle with a thin yellow outline, connected to a yellow-green horizontal bar. The text 'Produce your marketing material or attend your training' is written in white on the bar.



Submit for payment

The third step is represented by a white circle with a thin blue outline, connected to a teal horizontal bar. The text 'Submit for payment' is written in white on the bar.



# Logo and Messaging

- Trade Ally logo
- Text Requirements
- Messaging Requirements
  - Incentives
  - Energy Trust of Oregon
  - Additional Requirements and exclusions



## Other Offers – Training and Continuing Education



Training and workshops listed on the Training & Education Calendar

Construction Contractors Board (CCB) continuing education classes

Industry conferences

**Certification Office for Business Inclusion and Diversity  
(COBID)**



# COBID-Certification

## COBID-Certification

- To certify minority-owned, women-owned, and service-disabled veteran-owned business owners and emerging small businesses interested in contracting with state, county, and city government agencies

## The primary goal of certification

- To level the playing field by providing certified firms a fair opportunity to compete for government contracts regardless of owner ethnicity, gender, disability, or firm size

**Certification Office for Business Inclusion and Diversity (COBID)**

# Benefits of Getting Certified

Opportunity to bid on goal orientated contracts

Awards on projects that do not have a goal

Opportunities targeted toward emerging small businesses

Emergency response list

Connecting to prime contractors

Networking opportunities and events

Exposure — Marketing tool

Education opportunities

Mentorship programs

# Pathway to COBID-Certification

## Certification Assistance

- Energy Trust of Oregon and [Professional Business Development Group \(PBDG\)](#) is offering services at no cost to help support your business in getting certified through the Certification Office of Business Inclusion and Diversity (COBID) of Oregon

## Pathway to Certification

- Find out if your company is eligible to qualify by going to <https://www.oregon.gov/biz/Pages/default.aspx>



# Pathway to Certification Services

## Services Provided

- ✓ Coaching and advising
- ✓ Invitation to PBDG's standing office hours
- ✓ Invitation to PBDG's COBID Lunch & Learn group

## Services Not Provided

- X** PBDG cannot complete or submit your application
- X** PBDG is not authorized to login into your COBID account
- X** Processing times for applications vary through COBID office

# Pathway to Certification Application

**Visit** [www.insider.energytrust.org/resources/pathway-to-certification/](http://www.insider.energytrust.org/resources/pathway-to-certification/)

## Required Information

- **Business contact information and operations**
  - Contact name and information
  - Legal business name and DBA if applicable
  - Business address
  - Top priorities for your business
  - Types of markets and primary line(s) of business
- **COBID Certification**
  - Years you've filed taxes for your business
  - Percentage of managerial authority over business
  - Type of COBID certification you are applying for
  - Average annual gross receipts

**Questions?**





Thank you

Jocelyn Brink, Market Outreach Manager

[Jocelyn.Brink@clearesult.com](mailto:Jocelyn.Brink@clearesult.com)

503.467.0969