



January 2016 Trade Ally Forums

Existing Homes 2016 Business Development Fund Changes

January 19, 2016

Aaron Lazelle



Existing Homes Agenda

- 2016 Business Development Fund Changes
 - Discontinued reimbursements
 - New reimbursements
 - Yearly funding allotment
- Questions




2016 Business Development Fund Changes

2016 Business Development Fund Changes

Project	Reimbursement
Phone book ads	\$2,000 annual cap per trade ally, discontinued in Portland Metro area
Tablets	50% reimbursement, up to \$200, one tablet
Billboards	Discontinued
Website development enrollment benefit	\$250 web reimbursement, replaces training reimbursement for newly enrolled trade allies
Minimum reimbursement	\$75 minimum per request
Real estate ally reimbursement	Discontinued

2016 Business Development Fund Changes



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Business Development Fund Guidelines

Existing Homes Trade Ally Network

As an Existing Homes trade ally, you are eligible to receive partial reimbursement for marketing projects and training approved by Energy Trust of Oregon. Using the Energy Trust logo in your marketing pieces positions your business as an energy-efficiency expert, and participating in training helps your business improve and grow.

Rating	Annual Amount*	Cooperative Marketing**	Training and Events**
★★★★	\$8,000	50 percent reimbursement	50 percent reimbursement; maximum of \$250
★★★	\$4,000	30 percent reimbursement	30 percent reimbursement; maximum of \$100
★★	\$1,000	Projects can be pre-approved but are not eligible for reimbursement	30 percent reimbursement; maximum of \$100
Less than two stars	\$400	Projects can be pre-approved but are not eligible for reimbursement	30 percent reimbursement; maximum of \$100 per training, events are not eligible

*Minimum \$75 reimbursement per request, reimbursement subject to availability

**Preapproval required, see steps to receive reimbursement for more details

Steps to receive reimbursement

▶

Eligible cooperative marketing projects

▶

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Training + Events

01/08
Sustainable Homes Professional (SHP) - Module 4: Mechanical Systems and Performance Testing

01/19
Biannual Trade Ally Forum - Portland

01/20
Existing Homes Trade Ally Orientation - Part 1

All Events >

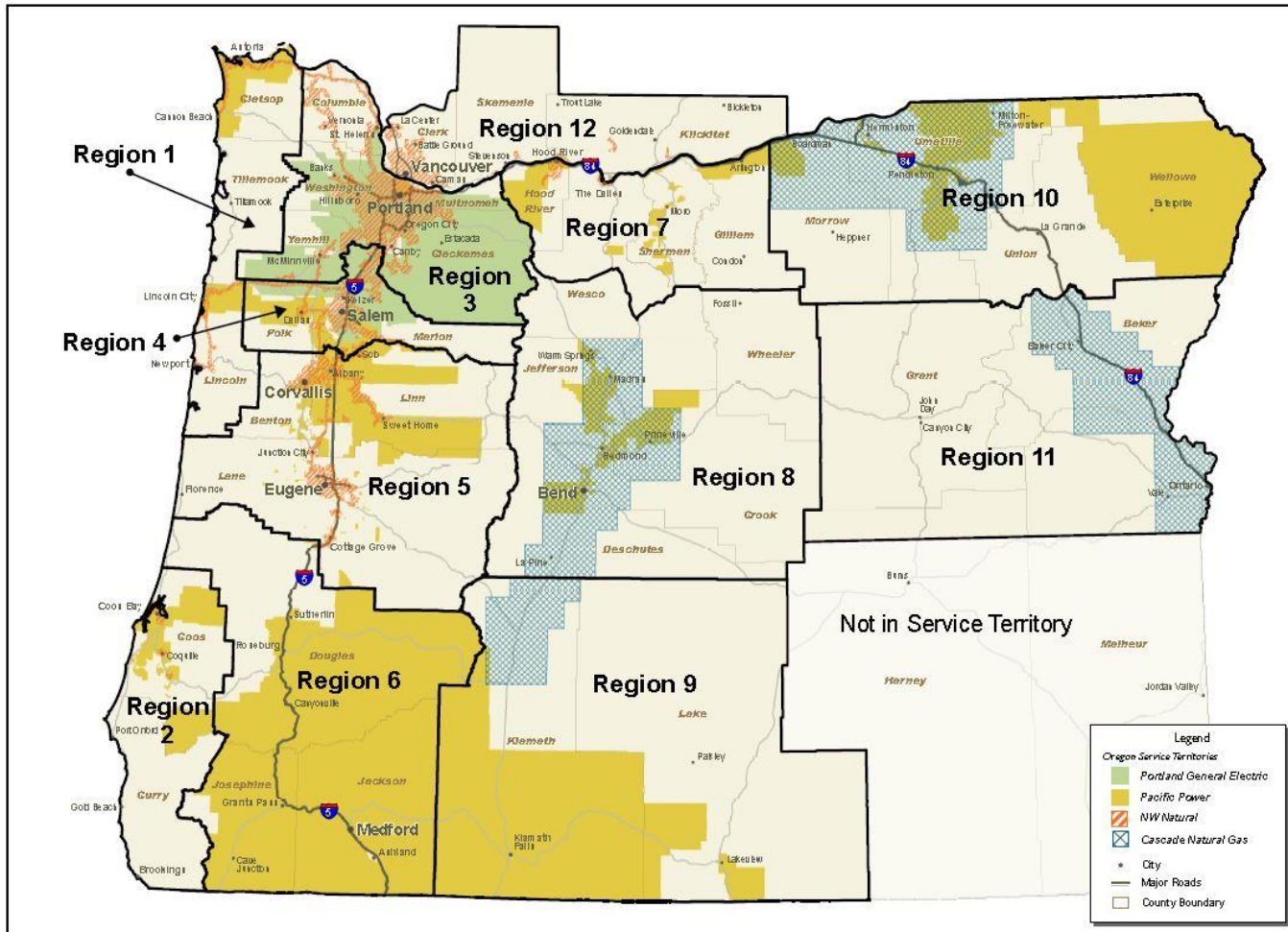
2016 Business Development Fund Changes

Phone book ads

- Discontinued in Portland Metro area
- Service regions 3 and 12
- Phone book ads outside Portland metro area remain eligible
- Annual cap of \$2,000 per trade ally



2016 Business Development Fund Changes



2016 Business Development Fund Changes

Billboards

- Discontinued in 2016

Real estate ally reimbursement

- Discontinued in 2016



2016 Business Development Fund Changes

Tablets

- 50% reimbursement up to \$200 off the purchase price of one business tablet



Minimum reimbursement

- \$75 minimum per request
- May bundle multiple invoices to meet minimum



2016 Business Development Fund Changes

Enrollment benefit

- \$250 web reimbursement to cover cost of professional website development
- Allies must have less than 12 months of participation
- Replaces the training reimbursement for newly enrolled trade allies



2016 Business Development Fund Changes

Yearly Funding Allotment

Star rating	Annual funds available	Cooperative marketing	Training and events
3	\$8,000	50 percent reimbursement	50 percent reimbursement ; maximum of \$250
2.5	\$4,000	30 percent reimbursement	30 percent reimbursement; maximum of \$100
2	\$1,000	Projects must be pre-approved for logo usage, but are not eligible for reimbursement	30 percent reimbursement; maximum of \$100
1.5 or fewer	\$400	Projects must be pre-approved for logo usage, but are not eligible for reimbursement	30 percent reimbursement; maximum of \$100 per training; events are not eligible

NOVEMBER

INSIDER

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NEWS FOR EXISTING BUILDINGS TRADE ALLIES



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New targeted Insider emails

- Customized by program
 - Subject lines
 - Contact
- Feature up to 5 articles
- Photos in emails
- New sidebar
- Starting March

Questions?

2016 Business Development Fund Changes

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Thank You

Existing Homes

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