

# BUSINESS DEVELOPMENT FUND

## RESIDENTIAL

### PRE-APPROVAL APPLICATION

Energy Trust of Oregon's Business Development Fund reimburses trade allies 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](http://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 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](http://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/<br>Bidding/ Project management) | <input type="checkbox"/> Certification / Re-certification | <input type="checkbox"/> Consulting (financial, business,<br>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 _____                                    |

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

\_\_\_\_\_

Business need/purpose: \_\_\_\_\_

\_\_\_\_\_

Estimated cost: \$ \_\_\_\_\_ Quantity: \_\_\_\_\_

### Personal Protective Equipment (PPE)

Energy Trust will 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.**

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.** Prequalification 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 pre-approval application as stated for consideration.*

Type of Marketing Project:

- Print ad
- Television ad
- Yard sign
- Direct Mail
- Bilingual ad
- Radio ad
- Online ad
- Brochure
- Business Cards
- 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](mailto:homesfund@energytrust.org)

Call 1.866.365.3526 option 4 for more information.