



Using trade ally benefits to your advantage

April 2017





Benefits at a glance

- Free listing in online Find-a-Contractor tool
- Trade Ally of Energy Trust logo
- Referrals from Energy Trust
- Publicity through Energy Trust marketing efforts and press releases
- Timely updates and communications
- Access to online tools and resources, exclusive promotions and technical help
- Additional credibility
- **Business development funds**

Business Development Funds

Business development fund overview

- Available only to trade allies
- Reimbursement for a portion of approved marketing materials and trainings
- Requires pre-approval
- Available through multiple Energy Trust programs – amounts vary
- Win-win: builds referrals for trade allies and customer awareness for Energy Trust





Which programs offer it?

- Existing Homes
- Existing Buildings
- Commercial lighting
- Solar
- Multifamily
- Streamlined Industrial



What generally qualifies?

- Radio, TV, print and digital ads
- Certain web development expenses
- Table signage and other event materials
- Trade ally logo on business cards
- Training posted on the Energy Trust trade ally training calendar
- Other CCB, BPI, NABCEP or relevant training (with approval)

What doesn't qualify?

- Applying to multiple programs for the same ad
- Craigslist, Angie's List and other classified ads
- Window decals (unless specified otherwise)
- Rented coveralls/uniforms
- **Energy Trust logo on vehicles**



Details by program

Existing Homes

Rating	Annual Amount	Marketing Projects	Training & 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	30 percent 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

Existing Homes—What's eligible?

- Print ads
- Yellow pages (outside Portland Metro area)
- Digital Media
- Radio and TV advertisements
- Website development for new trade allies
- Apparel



Existing Homes—What's ineligible?

- Yellow pages inside the Portland Metro area
- Web design for current trade allies
- Rented apparel or uniforms
- Billboards
- Classified ads
- NPR or OPB ads



Commercial & Industrial

Requirement	Reimbursement	Cap
Placement of “Trade Ally of Energy Trust” logo	33 percent of allowable marketing costs	Up to \$15,000 per year, subject to budget limitations

Commercial & Industrial—What's eligible?

- Print, radio and TV
- Yellow pages
- Billboards
- Digital media
- Brochures
- Business cards
- Web development



Commercial & Industrial—What's ineligible?

- Classified ads
- Contact your trade ally coordinator



Solar

Rating	Annual Amount	Cooperative Marketing	Training & Events	Certification
★ ★ ★	\$8,000	50 percent reimbursement	50 percent reimbursement	50 percent reimbursement
★ ★ ★	\$4,000	30 percent reimbursement	30 percent reimbursement	30 percent reimbursement
★	\$1,000	30 percent reimbursement	30 percent reimbursement	30 percent reimbursement
	\$400	Projects can be pre-approved but are not eligible for reimbursement	30 percent reimbursement	30 percent reimbursement

Solar—What's eligible?

- Print, radio and TV
- Yellow pages
- Yard signs and billboards
- Digital media, including websites
- Apparel
- Training and continuing education



Getting started

- Visit Insider pages at insider.energytrust.org
- Review logo usage guidelines at insider.energytrust.org/logos
- Speak with your [trade ally coordinator](#)





Thank You

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Craft3 Home Energy Loan

Updates and Improvements

Energy Trust of Oregon affiliates

April 2017



We provide loans to entrepreneurs and individuals



- Nonprofit non-bank business and consumer lender.
- Since 1994, Craft3 has invested over \$400 million in entrepreneurs, nonprofits and individuals.
- **Of that, over \$46 million has been invested in 3,500+ home energy projects.**
- Craft3 loans align with our mission of strengthening economic, ecological and family resilience.
- Loans are available in the urban and rural communities of Oregon and Washington.
- 56 employees are located in 7 regional offices.



New & Improved Features of our Home Energy Loan

- **100 percent financing (no out-of-pocket expenses).** Up to:
 - **\$7,500** for Savings Within Reach projects for NW Natural, PGE, and Pacific Power (**new increase**)
 - \$10,000 for heat pump projects for PGE and Pacific Power
 - \$15,000 for Southwest Washington NW Natural projects
 - \$30,000 for Enhabit NW Natural, PGE, and Pacific Power projects
- **Credit scores as low as 590, no equity required**
- **Straightforward rates at no cost to the contractor**
 - Universal rates for all approved applicants
 - No rate hikes for lower credit scores
 - No teaser rates with hidden costs
- **Easy repayment on heating bill for NW Natural, PGE, and Pacific Power**
- **Faster process!**
 - Online and paper applications
 - **Electronic document signing**
 - Electronic payment to contractors



Simple process for ETO programs

1. Apply to Craft3 in less than 10 minutes www.Craft3.org/HomeEnergy
(Apply simultaneously to ETO for project/incentive approval)

2. Craft3 emails decision to borrower in under 3 business days

- Pre-approval email sent to borrower/ETO plus contractor if we have a name
- ETO emails approved bid and incentive form to Craft3 to create loan docs

3. Customer signs loan documents electronically

- Up to 50 percent of loan may be available up-front to contractors

4. Contractor completes work

- Submit final invoice/invoice summary to ETO
- ETO sends docs to Craft3 for funding

5. Craft3 pays remaining balance to the contractor.

- Upon receipt of final signed invoice and PA form, utility/partner QA check

6. Customer repays loan via their primary heat source utility bill.



Example projects



**Savings Within Reach program:
weatherization and furnace**
Ron and Muriel Jensen

"My husband has been in poor health and our drafty old place is wonderful, but always cool. We've been so warm and toasty with our new gas furnace! We were able to afford it, even on social security!"



**Home Performance Contractor
Abacus Energy Solutions**

"With on-bill financing through your utility company, the Craft3 loan cannot be beat; the rates are great and the loan is simply attached to a utility bill you are already paying."



Gas furnace to replace expensive wood stove causing health concerns
Margaret McDowell, NW Natural customer

"Craft3 was very important to me because other options would have been too expensive. I found the process was very easy to go through. I have noticed already that I don't wake up every morning with a stuffy nose."



We look forward to working with you

Erik Lantz

VP, Consumer Portfolio Manager

888-231-2170 x505

HomeEnergy@Craft3.org

Website and Application

www.Craft3.org/HomeEnergy