



Trade Ally Network Support  
Cameron Starr – Customer Service and  
Trade Ally Team



# Agenda

- What is Energy Trust?
- Trade Ally Network and benefits
- Staying informed
- Q&A

## About us

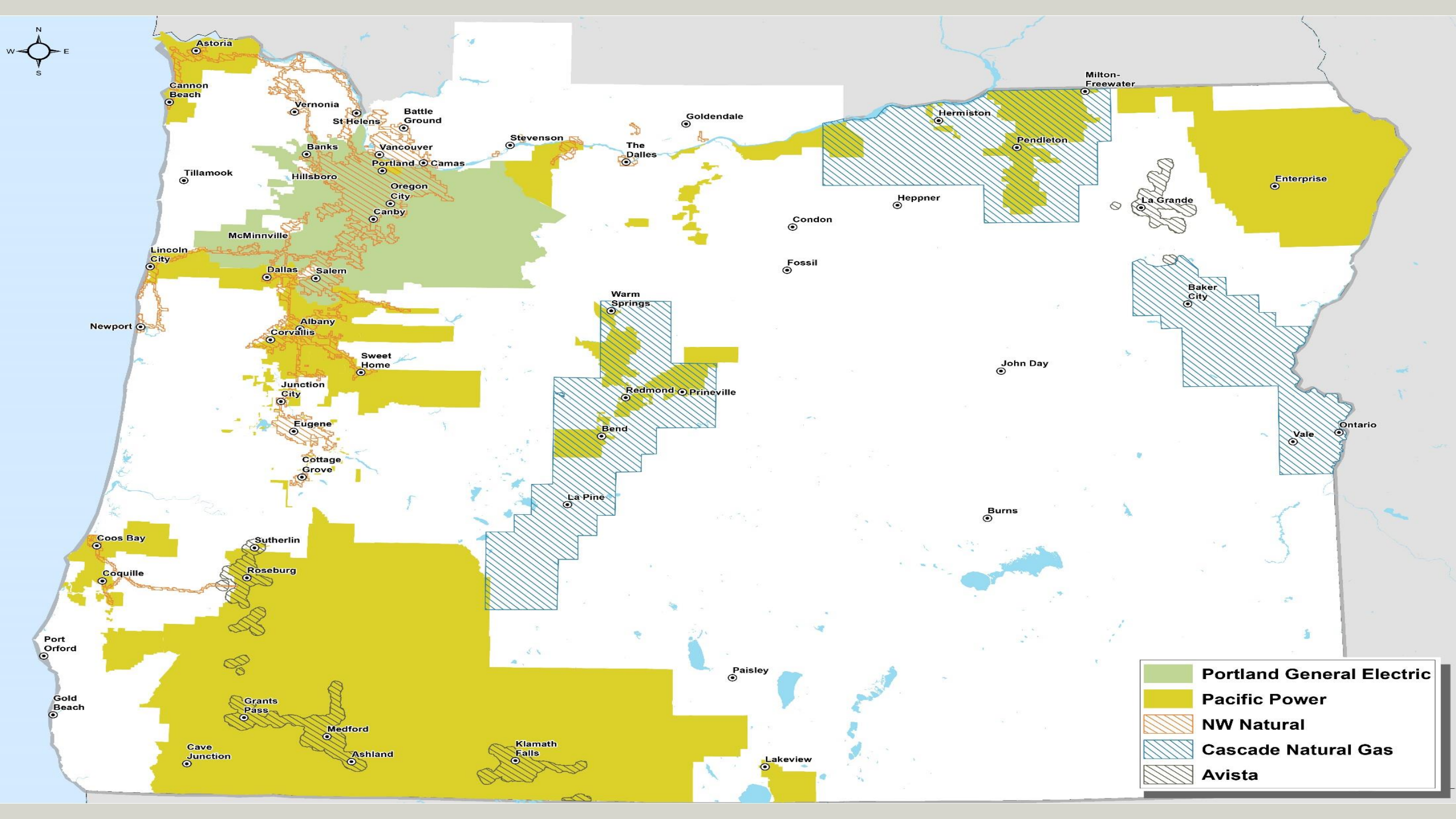
Independent  
nonprofit

Serving 1.6 million customers of  
Portland General Electric,  
Pacific Power, NW Natural,  
Cascade Natural Gas and Avista

Providing  
access to  
affordable  
energy

Generating  
homegrown,  
renewable  
power

Building a  
stronger Oregon  
and SW  
Washington





# Why do we do this?

- Efficiency is the least expensive, most benign energy we can buy
- Renewables are the cleanest generation options available
- Diversifying future resource mix
- Reducing need for more expensive conventional, fossil fuel resources



# Energy Trust Programs

- Residential
- Commercial (new construction and retrofit)
- Multifamily
- Industrial and Agriculture
- Renewables

# What is a cash incentive?

- A cash incentive is a check that is provided after a qualified energy efficiency upgrade is completed
- We provide cash incentives to customers, retailers, contractors and builders
- Our incentives are designed to make energy efficient upgrades more affordable and attractive to customers



# Sample Residential Incentives

- Insulation
- Energy-efficient windows
- High-efficiency heating and air conditioning
- Water heating (through select retailers)
- Solar

[Full list](#) available online





# EPS™ New Construction

- Early design assistance, marketing assistance and cash incentives for builders of qualifying homes.
- Ongoing training for builders and verifiers.



# Free & Income-Based Offers

- **Duct sealing for owners of existing manufactured homes**
  - FREE for the customer—incentives paid to the contractor
  - Offered through participating trade ally contractors
- **Savings Within Reach**
  - Increased cash incentives for moderate income customers
  - Incentives paid to the contractor—reducing the customer's upfront cost
  - Specialized group of participating trade ally contractors







## Existing Multifamily

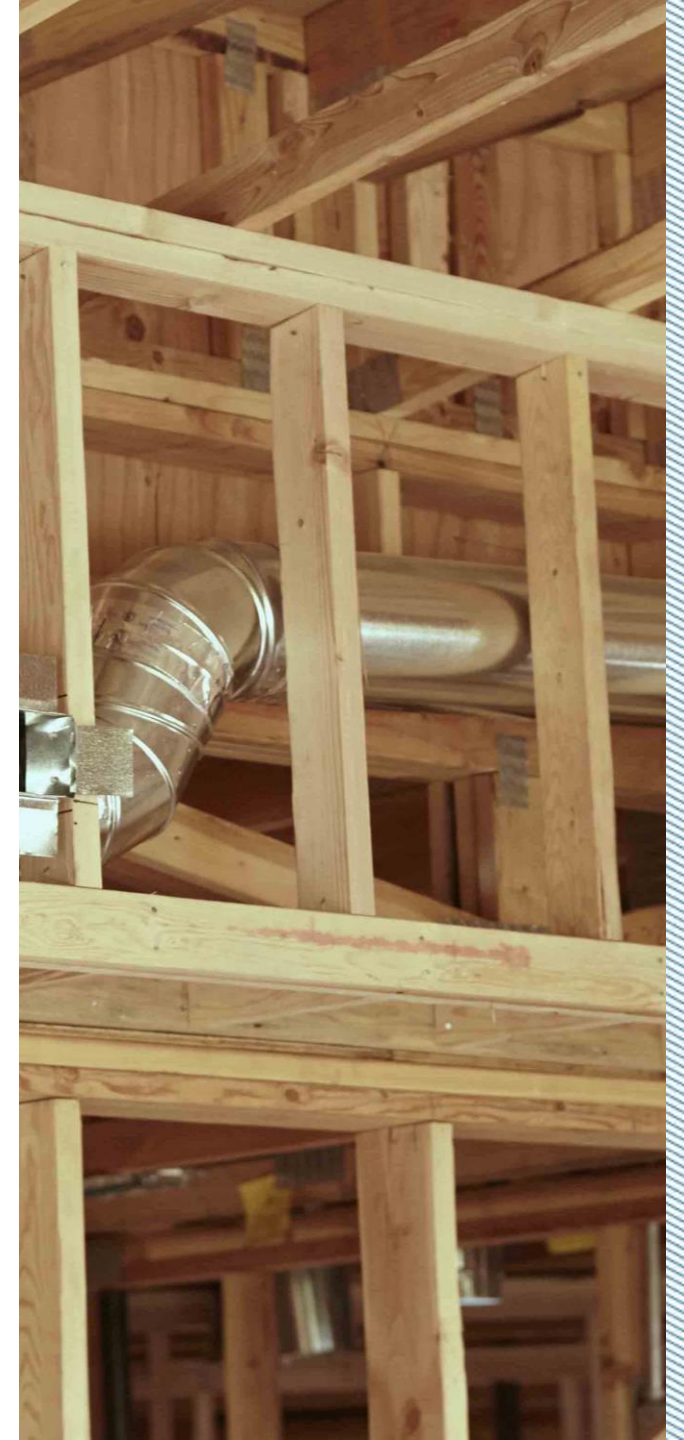
- Appliances
- Heating and cooling
- Insulation
- Windows and doors
- Water heating
- Free energy-saving devices for tenants
- Solar electric

# Trade Ally Network and Benefits



# 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

Standard trade ally	MBE, WBE, VBE & Rural trade ally
<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)
- Staff support (tablets and equipment discounts)

## Personal Protective Equipment

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

TRADE ALLY Business Development Fund

## RESIDENTIAL BUSINESS DEVELOPMENT FUND

### 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 found at [www.energytrust.org/homesbdf](http://www.energytrust.org/homesbdf).

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

#### Personal Protective Equipment (PPE)

Energy Trust will reimburse qualified PPE purchased from January 1, 2021 to December 31, 2021. 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:	Sanitizing and prevention:	Social distancing equipment:
<input type="checkbox"/> Disposable gloves	<input type="checkbox"/> Hand sanitizer	<input type="checkbox"/> Social distance signage
<input type="checkbox"/> Disposable masks	<input type="checkbox"/> Disinfecting wipes	<input type="checkbox"/> Social distance marking tape
<input type="checkbox"/> Disposable booties	<input type="checkbox"/> Hand wash station	
<input type="checkbox"/> Disposable coveralls	<input type="checkbox"/> Thermometer	

#### 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.

Type of marketing project (select one):

<input type="checkbox"/> Print ad	<input type="checkbox"/> Online ad	<input type="checkbox"/> Direct mail
<input type="checkbox"/> Radio ad	<input type="checkbox"/> Yard sign	<input type="checkbox"/> Website (URL _____)
<input type="checkbox"/> Television ad	<input type="checkbox"/> Brochure	

Description: \_\_\_\_\_  
Estimated cost: \$ \_\_\_\_\_ Quantity/impression: \_\_\_\_\_ Date(s) in the market: \_\_\_\_\_  
Estimated size: \_\_\_\_\_  
Counties in Oregon or Washington 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: \_\_\_\_\_  
Date: \_\_\_\_\_ Cost: \$ \_\_\_\_\_ Number of staff attending: \_\_\_\_\_

**SEND COMPLETED FORMS TO:**  
[homesfund@energytrust.org](mailto:homesfund@energytrust.org)  
Call 1.866.365.3526 option 4 for more information.

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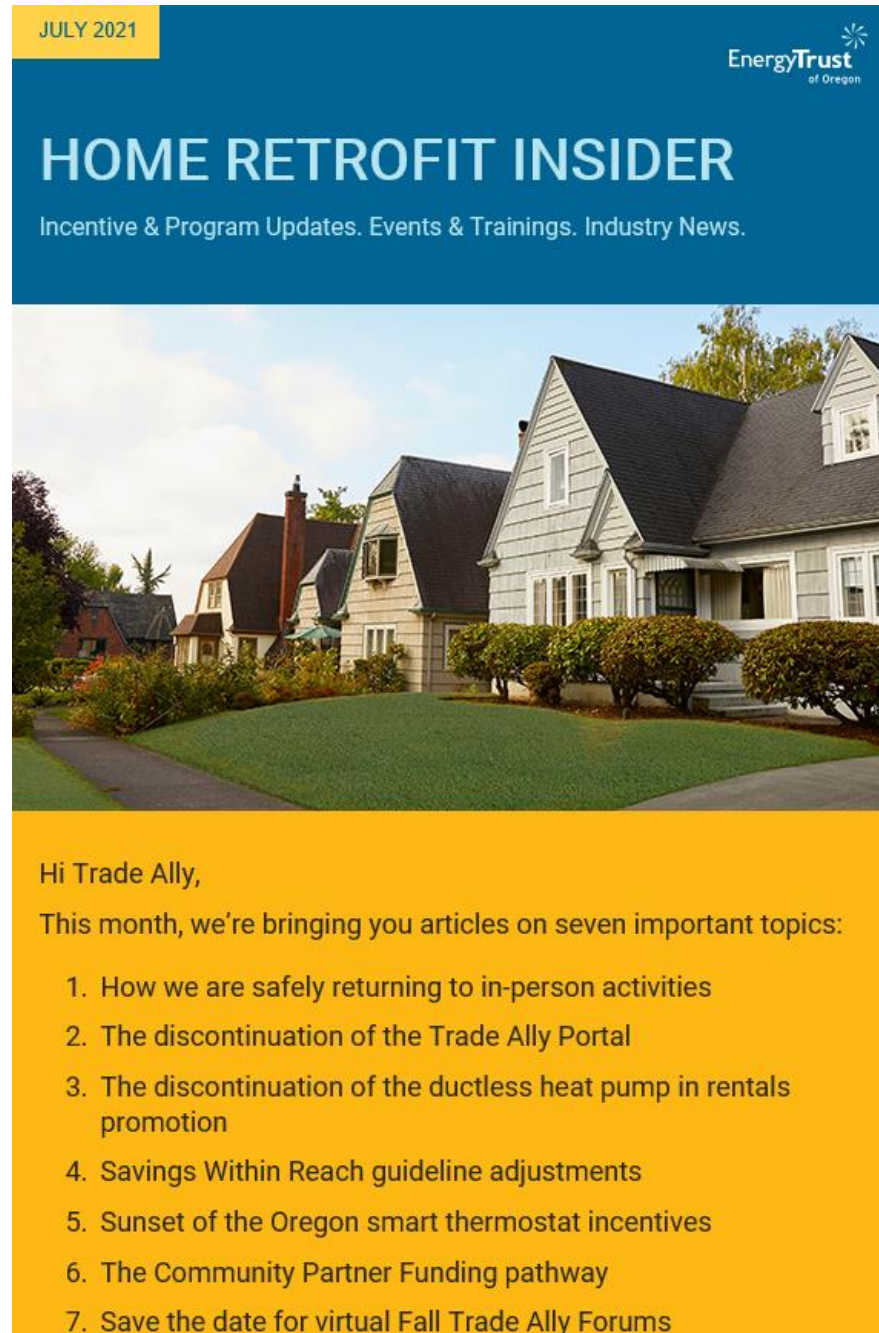


Stay Informed



# Insider

- Every other month newsletter that provides program updates including upcoming offers
- Make sure you are signed-up
- [Insider.energytrust.org](https://insider.energytrust.org)



## HOME RETROFIT

September 14, 2021

### Energy Trust's Fall Virtual Trade Ally Forum is next month

Energy Trust's 2021 Virtual Trade Ally Forum will be held on Thursday, October 28, 2021 from...

EPS New Construction, Existing Multifamily, Home Retrofit, Solar

September 13, 2021

### Key incentive applications and collateral now available in Spanish

Energy Trust of Oregon has new resources available in Spanish that

September 13, 2021

### With new legislation, Oregon ups its clean energy game

Like the Portland Trail Blazers' Damian Lillard, Oregon's 81st Legislative Assembly uncorked a flurry of late-in-the-game...



Questions?





Thank you

Cameron Starr, Sr. Customer  
Experience Operations  
Manager

[Cameron.starr@energytrust.org](mailto:Cameron.starr@energytrust.org)