

# BUSINESS DEVELOPMENT FUND GUIDELINES

## SOLAR TRADE ALLY NETWORK

As a trade ally, you may be 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 a solar expert, and participating in training helps your business improve and grow.

### Examples of eligible cooperative marketing projects

**Print advertisements**—Yellow Pages, direct mail and brochures

**Digital media**—online banner ads, pay-per-click ads

**Radio and television advertisements**

**Outdoor yard signs**

### Apparel

Energy Trust trade ally logo may be embroidered or screenprinted on shirts, jackets or hats. Logo must be black or white and oriented horizontally on the left sleeve or chest.

### Events

Trade allies can receive reimbursements for pre-approved event display costs.

### Website

Website must follow print marketing guidelines and logo must hyperlink to [www.energytrust.org/solar](http://www.energytrust.org/solar).

### Training and continuing education

The following pre-approved trainings are eligible for business development funds:

- Trainings and workshops listed on the Training & Education Calendar at [www.energytrust.org/businessdevelopment](http://www.energytrust.org/businessdevelopment)
- Classes offering continuing education units for Construction Contractors Board (CCB), Building Codes Division (BCC), and North American Board of Certified Energy Practitioners (NABCEP)
- Industry certifications (NABCEP Entry Level Exam, NABCEP PV Installation Professional, NABCEP PV Technical Sales Professional, NABCEP Company Accreditation)
- Registration for the Oregon Solar Energy Conference (OSEC)
- Conference registrations

To request reimbursement for other industry trainings or business development trainings, submit the pre-approval request form available at [www.energytrust.org/businessdevelopment](http://www.energytrust.org/businessdevelopment).

### Exclusions and ineligible projects

You may not use Energy Trust's logo or name on any classified listing, such as Craigslist or Angie's List. Cooperative marketing is not available for radio or TV advertisements on NPR or PBS. Energy Trust does not permit the use of its logos on trade ally vehicles or places of business. Energy Trust reserves the right to exclude use of its own trade ally logo or exclude any trade ally marketing project at any time.

## REIMBURSEMENT

To request reimbursement for sales, marketing, advertising, or other business development trainings, submit the pre-approval request form available from [www.energytrust.org/businessdevelopment](http://www.energytrust.org/businessdevelopment).

## Multiple program enrollment

If you are a trade ally enrolled in more than one Energy Trust program, you may receive business development funds from only one program for an individual marketing piece or training; no piece or training shall receive funding from more than one program. A trade ally participating in more than one business development program is eligible for the maximum yearly cap from each program.

## Language and messaging requirements

### Incentives and tax credits

- Do not refer to Energy Trust cash incentives as “rebates.” They are “incentives” or “cash incentives.”
- Do not refer to tax credits as “cash incentives.” If advertising or promotion refers to tax credits in combination with Energy Trust cash incentives, it must refer to them as “tax credits” and “incentives” or “cash incentives.” Example: “Solar electric installations may qualify for tax credits and incentives totaling \$9,000.”
- If advertising or promotion refers to the percentage of cost savings available through tax credits and incentives, it must include the words “up to.” Example: “Up to 75 percent of system cost can be covered by tax credits and incentives.”

## Energy Trust of Oregon, Net-metering and Oregon Department of Energy

- Refer to Energy Trust of Oregon as “Energy Trust of Oregon” in the first use and “Energy Trust” thereafter. Do not refer to Energy Trust as ETO.
- Do not use “partner,” “partnership” or “partnering” when associating Energy Trust with your business. Use “trade ally contractor of” or “in collaboration with.”

### Net-metering

- Net-metering is designed to offset energy costs, not to allow customers to become energy wholesalers. Language must conform to that idea.

### Oregon Department of Energy

- Oregon Department of Energy should not be referred to as ODOE.

## Energy Trust logo requirements

### Clear space and placement

The Energy Trust logo must be included on all pieces and should be smaller than your company’s logo. Space surrounding the Energy Trust logo must be no less than the size of the “burst” symbol within the logo, as shown below. Preferred placement is the lower right corner of the ad. The trade ally logo must be used in black or in white against a solid color background.

Download Energy Trust logos, available in black and white, from [www.energytrust.org/businessdevelopment](http://www.energytrust.org/businessdevelopment).



## Available funding for Solar trade allies

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
Fewer than two stars	\$400	Projects can be pre-approved but are not eligible for reimbursement	30 percent reimbursement	30 percent reimbursement

\*Minimum \$75 reimbursement per request, see steps to receive reimbursement for more details

\*\*Preapproval required

\*\*\*Trade allies who apply for and achieve NABCEP PV Company Accreditation may qualify to receive 100% reimbursement for costs associated with the accreditation application up to the annual cap

## Steps to receive Business Development Fund reimbursement

### 1 Request pre-approval

Before releasing your marketing project or attending training, request pre-approval by submitting the pre-approval application (available at [www.energytrust.org/businessdevelopment](http://www.energytrust.org/businessdevelopment)) and draft versions of the marketing piece or course descriptions of the training to the project manager trade for pre-approval (contact information below).

You will receive confirmation of receipt 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.**

### 2 Produce your marketing materials or attend your training

After receiving Energy Trust's written approval, you may proceed to produce your materials or attend your class.

### 3 Submit for payment

After your marketing project has been released to the public, or your class has been completed, submit an invoice for print and production costs within 60 days of the original invoice date. Energy Trust cannot pay designers, printers or other suppliers directly. Include one of the following:

1. A copy/tearsheet of produced marketing project for print materials
2. A photo of the produced yard sign, event space, display or apparel
3. An aircheck for radio and television advertisements
4. A certificate of training completion

Reimbursement checks will be mailed to participating trade ally contractors within 60 business days of receiving all required materials. Funds are limited and are available on a first-come, first-served basis. Business development fund amounts are subject to change. Energy Trust reserves the right to decline reimbursement for any project.



For questions, email [solarfund@energytrust.org](mailto:solarfund@energytrust.org) or call 1.866.251.2524.