

Light and Power Department
City of Traverse City, Michigan
Adopted: March 11, 2003
Revised: April 6, 2004
Revised: January 4, 2021
Revised: May 16, 2022

COMMUNITY INVESTMENT FUND POLICY

Requests for donations and contributions will be considered if they comply with and follow the provisions of the Community Investment Fund which is attached. All requests shall be acted upon by the Traverse City Light and Power Board.

Pursuant to MCL 123.391 the City Commission approves the purposes of all gifts conforming to the Community Investment Fund as attached and delegates to the Traverse City Light and Power Board authority to make such gifts up to a cumulative amount established in the Traverse City Light and Power approved budget line item number 582-525-82401.

This policy supersedes and replaces the Charitable and Civic Contributions Policy adopted on January 10, 1984, and all other policies in conflict with this policy.

ADOPTED BY THE TRAVERSE CITY LIGHT AND POWER BOARD ON MAY 10, 2022.

APPROVED BY THE CITY COMMISSION ON MAY 16, 2022



Brandie Ekren
Executive Director and Secretary
Traverse City Light and Power Board

Traverse City Light and Power Community Investment Fund

Provisions and Guidelines

Revised May 16, 2022

About the Community Investment Fund:

Our mission at Traverse City Light and Power (Light and Power) is to provide the Public Power benefits of safety, lower rates, high reliability, local control and exceptional customer service. At the same time, we have a responsibility to invest our resources in the community we serve, with the goal of helping to make our town a better place to live. One way we do that is through the Community Investment Fund (CIF). Each year, Light and Power allocates funds to the CIF budget line item for the purpose of providing assistance to non-profit organizations in the Light and Power service area.

Our Values and Vision:

The vision of the CIF is to enhance the quality of life in the Traverse City area by supporting the values that are commonly shared in our community. Traverse City Light and Power charitable contributions are focused on three key areas:

- **Community Development** - Public infrastructure programs and other projects that provide a direct benefit to our customers and the people of the Traverse City area, with an emphasis on programs and projects within our service area.
- **Energy-Related Educational Programs** - Programs and projects that educate people of all ages about current and future energy sources, and the financial benefit of energy conservation.
- **Natural Resources/Environmental** - Programs and projects aimed at maintaining and improving the quality of natural resources and supporting a sustainable environment in the Traverse City area.

Community Investment Fund Guidelines:

Funds are generally awarded to foster and further the above values and vision to non-profit organizations or groups for specific educational, environmental and community development purposes. The requesting organization must reside in the Traverse City area, be non-profit (i.e. be exempt from federal income tax under the Internal Revenue Code) and operate for public purposes.

Preference is given for CIF requests that:

- Are one time in nature, rather than ongoing
- Benefit a large number of people
- Leverage funds from other sources
- Help programs increase their capacity to deliver services

The CIF does not provide support to:

- Individuals (including those seeking direct scholarships)
- Political parties, organizations or activities
- Religious organizations for religious (denominational) purposes
- Student group trips
- National or international organizations, unless they are providing benefits directly to our service-area residents

How to Apply:

The Community Investment Fund Grant Application forms and instructions are available online at www.tclp.org, or at the Light and Power administrative offices located at 1131 Hastings Street, Traverse City, Michigan 49686. **A completed application form must accompany all requests. Please submit completed requests to:**

Traverse City Light and Power
Community Investment Fund
1131 Hastings Street
Traverse City, MI 49686

Or via email to website@tclp.org (indicate “Community Investment Fund” in subject line)

Grant applications will be accepted two times per year from the period of May 1 – July 31 and from November 1 – January 31. Grant awards will be approved no later than the third Board meeting following end of submission deadline with awards contingent on available funds. All requests shall be acted upon by the Traverse City Light and Power Board.

Application Format:

1. All requests must be in writing and should be directed to the Traverse City Light and Power Community Investment Fund.
2. Requests should include a cover letter, brief summary of the request, supporting documentation and a completed grant application form. Please keep requests brief and to the point.
3. Requests initiated by telephone will not be acted upon until a written request is received.
4. Requests initiated by facsimile are discouraged.
5. Send only one copy of your request.



**GRANT APPLICATION FORM
COVER SHEET**

Date of Application: _____

Legal name of organization applying: _____
(Should be same as on IRS determination letter and as supplied on IRS Form 990)

Year Founded: _____ Current Operating Budget: _____

Executive Director: _____ E-mail Address: _____

Contact person/title/phone number: _____
(if different from executive director):

Address *(principal/administrative office)*: _____

City/State/Zip: _____

Phone number: _____ Fax Number: _____
(include area code) *(include area code)*

Web address: _____

List any previous support from this funder in the last 5 years: _____

Project Name: _____

Purpose of Grant *(one sentence)*: _____

Dates of the Project: _____ Amount Requested: \$ _____

Total Project Cost: \$ _____

Geographic Area(s) Served: _____

By signing below, I confirm I have read and agree to the Traverse City Light & Power Community Investment Fund Policy Provisions and Guidelines and certify that the request meets all required criteria detailed in the policy and that all information submitted is true and correct.

Authorizing Signature

Date

Printed Name and Title

GRANT APPLICATION FORMAT INSTRUCTIONS

Please provide the following information in this order. Use these headings, subheadings and numbers provided in your own word processing format, thus leaving flexibility for length of response.

NARRATIVE

1. Executive Summary

- Begin with a one -page executive summary. Briefly explain the following:
 - Why your agency is requesting this grant?
 - What outcomes you hope to achieve?
 - How your grant meets the three key areas and guideline requirements outlined in the *Policy Provisions and Guideline?*
 - How you will spend the funds if the grant is made?

2. Purpose of Grant

- Statement of needs/problems to be addressed; description of target population and how they will benefit.
- Description of project goals, measurable objectives, action plans, and statements as to whether this is a new or ongoing part of the sponsoring organization.
- Timetable for implementation.
- List of other partners in the project and their roles.
- List of similar existing projects or agencies, if any, and explain how your agency or proposal differs, and what effort will be made to work cooperatively.
- Description of the active involvement of constituents in defining problems to be addressed, making policy, and planning the program.
- Description of the qualifications of key staff and volunteers that will ensure the success of the program. List of specific staff training needs for this project.
- Long-term strategies for funding this project at end of grant period.

3. Evaluation

- Plans for evaluation including how success will be defined and measured.
- Description of how evaluation results will be used and/or disseminated and, if appropriate, how the project will be replicated.
- Description of the active involvement of constituents in evaluating the program.

4. Budget Narrative/Justification

- Grant budget; use the **Grant Budget Format** that follows, if appropriate.
- A plan (on a separate sheet) that shows how each budget item relates to the project and how the budgeted amount was calculated.
- List of amounts requested of other foundations, corporations and other funding sources to which this proposal has been submitted.
- List of priority items in the proposed in the proposed budget, in the event that we are unable to meet your full request.

5. Organization Information

- Brief summary of organization's history.
- Brief statement of organization's mission and goals.
- Description of current programs, activities and accomplishments.
- Organizational chart, including board, staff and volunteer involvement.

SUPPORTING DOCUMENTATION

1. A copy of the current IRS determination letter indicating 501(c)(3) tax-exempt status.
2. List of Board of Directors with affiliations.
3. Finances:
 - Organization's current annual operating budget, including expenses and revenue.
 - Most recent annual financial statement (independently audited, if available; otherwise, attach Form 990).
4. Letters of support should verify project need and collaboration with other organizations. (Optional)
5. Annual report, if available.

GRANT BUDGET FORMAT

Below is a listing of standard budget items. Please provide the project budget in this format and in this order.

A. Organizational fiscal year: _____

B. Time period this budget covers: _____

C. For a CAPITAL request, substitute your format for listing expenses. These will likely include: architectural fees, land/building purchase, construction costs, and campaign expenses.

D. **Expenses:** include a *description and the total amount* for each of the following budget categories, in this order:

| | <i>Amount requested from this organization</i> | <i>Total project expenses</i> |
|--------------------------------------|--|---|
| Salaries | \$ _____ | \$ _____ |
| Payroll Taxes | \$ _____ | \$ _____ |
| Fringe Benefits | \$ _____ | \$ _____ |
| Consultants and Professional Fees | \$ _____ | \$ _____ |
| Insurance | \$ _____ | \$ _____ |
| Travel | \$ _____ | \$ _____ |
| Equipment | \$ _____ | \$ _____ |
| Supplies | \$ _____ | \$ _____ |
| Printing and Copying | \$ _____ | \$ _____ |
| Telephone and Fax | \$ _____ | \$ _____ |
| Postage and Delivery | \$ _____ | \$ _____ |
| Rent | \$ _____ | \$ _____ |
| Utilities | \$ _____ | \$ _____ |
| Maintenance | \$ _____ | \$ _____ |
| Evaluation | \$ _____ | \$ _____ |
| Marketing | \$ _____ | \$ _____ |
| Other (specify) | \$ _____ | \$ _____ |
| <i>Total amount requested</i> | \$ _____ | <i>Total project expenses</i> \$ _____ |

E. **Revenue:** include a *description and the total amount* for each of the following budget categories, in this order; please indicate which sources of revenue are committed and which are pending.

| | <u><i>Committed</i></u> | <u><i>Pending</i></u> |
|-----------------------------------|-------------------------|-----------------------|
| 1. Grants/Contracts/Contributions | | |
| Local Government | \$ _____ | \$ _____ |
| State Government | \$ _____ | \$ _____ |
| Federal Government | \$ _____ | \$ _____ |
| Foundations (itemize) | \$ _____ | \$ _____ |
| Corporations (itemize) | \$ _____ | \$ _____ |
| Individuals | \$ _____ | \$ _____ |
| Other (specify) | \$ _____ | \$ _____ |
| 2. Earned Income | | |
| Events | \$ _____ | \$ _____ |
| Publications and Products | \$ _____ | \$ _____ |
| 3. Membership Income | \$ _____ | \$ _____ |
| 4. In-Kind Support | \$ _____ | \$ _____ |
| 5. Other (specify) | \$ _____ | \$ _____ |
| <i>Total Revenue</i> | \$ _____ | \$ _____ |