

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



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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](http://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](mailto: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 TCLP 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.

## NARRATIVE

### 1. Executive Summary

- Briefly explain the following:
  - Why your agency is requesting this grant, to include statement of need/problem to be addressed.
  - Description of the target population and how they will benefit.
  - 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 TCLP awarded funds if the grant is made?
  - List of other partners in the project and their roles.
  - Timetable for implementation.
  - Description of the qualifications of key staff and volunteers that will ensure the success of the program.
  - Long-term strategies for funding this project at end of grant period.
  - Plans for evaluation including how success will be defined and measured.
  - How will TCLP be recognized?

### 2. Budget Narrative/Justification

- Grant budget; use the **Grant Budget Format** that follows, if appropriate.
- A plan 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.

### 3. Organization Information

- Brief statement of organization's mission and goals.

## SUPPORTING DOCUMENTATION

1. A copy of the current IRS determination letter indicating 501(c)(3) tax-exempt status.
2. Letters of support should verify project need and collaboration with other organizations. (Optional)

## 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)	\$ _____	\$ _____
<b><i>Total amount requested</i></b>	<b>\$ _____</b>	<b><i>Total project expenses</i></b> <b>\$ _____</b>

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.

	<b><u>Committed</u></b>	<b><u>Pending</u></b>
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 ( <i>specify</i> )	\$ _____	\$ _____
<b><i>Total Revenue</i></b>	<b>\$ _____</b>	<b>\$ _____</b>