

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: September 23, 2025

About the Community Investment Fund:

At Traverse City Light and Power (TCLP), our mission is to serve as the trusted community partner for delivering innovative, affordable, reliable, and environmentally sustainable energy and telecom solutions. The Community Investment Fund (CIF) advances projects that foster environmental stewardship, innovation, and community well-being in ways that directly benefit TCLP customers and align with TCLP's Strategic Priorities.

Each year, TCLP allocates funds to the CIF to provide assistance to non-profit organizations within our service territory, as well as to townships contiguous to the City's corporate limits.

Values and Vision:

The CIF focuses on the following objectives:

A. Clean Energy Related Programs and Projects

B. Innovative Technology (e.g., mini/micro grids, research and development, energy storage, demand side management, building and transportation electrification such as space/water heating, EV charging, appliance electrification)

C. Natural Resources/Environmental Programs (education, restoration, preservation) that supports TCLP's Environmental Sustainability Strategic Priority

Community Investment Fund Guidelines:

Funds are 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 be a non-profit (exempt from federal income tax) located within the TCLP service territory or contiguous townships, and must operate for public purposes.

Grants will be reduced by clean energy incentives as an eligible TCLP customer to ensure equitable distribution and avoid duplicating incentives.

Preference is given for CIF requests that:

- Are one time in nature, rather than ongoing
- Benefit TCLP customers
- Leverage funds from other sources
- Help programs increase their capacity to deliver services (e.g., training, technology, improved systems – not ongoing operations)
- Are from new requesting agencies over previous awardees
- Demonstrate partnerships or collaboration

The CIF does not provide support to:

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

How to Apply:

Grant applications will be accepted twice per year:

- May 1 – July 31
- November 1 – January 31

Awards will be approved no later than the third Board meeting following the submission deadline, contingent on available funds.

Applications must be submitted either by mail or email (subject line: “Community Investment Fund”) to TCLP’s administrative offices:

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

Or via email to website@tclp.org.

Fax submissions are discouraged. Telephone requests will not be acted upon until a written request is received.

Application Format:

All requests must include:

- ✓ Completed CIF Grant Application Form
- ✓ Cover letter
- ✓ Brief project summary
- ✓ Supporting documentation
- ✓ Only one copy of the request is required

Review Process:

Staff will organize all eligible applications for review by the Community Investment Fund Ad Hoc Committee. The Ad Hoc Committee will evaluate applications based on alignment with CIF priorities, community benefit, project feasibility, and leveraging of other funds. Recommendations will be forwarded to the TCLP Board for final action.

Post-Award Reporting:

Recipients must submit a brief report within 90 days of project completion summarizing how funds were used and the measurable community impacts achieved. TCLP may feature funded projects in public communications.



TRAVERSE CITY
LIGHT & POWER

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: _____
(include area code)

Fax Number: _____
(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)	\$ _____	\$ _____
Total amount requested	\$ _____	Total project expenses \$ _____

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>Committed</u>	<u>Pending</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)	\$ _____	\$ _____
Total Revenue	\$ _____	\$ _____