



CONSUMERS POWER INC.

Charitable Trust Applicants,

Thank you for requesting a Charitable Trust application.

The Charitable Trust is funded by Operation Round Up, a voluntary contribution program that allows members of Consumers Power to round up their monthly bill to the next dollar. The difference is captured and combined with other donors for funding of various organizations and individuals in CPI's service area. The average donation amount is \$6 per year.

A nine-member committee from the CPI service area reviews and decides on funding for the applications.

Please review the attached CPI Charitable Trust Grant Guidelines for eligibility requirements.

The Trust committee meets in April, August and November. Applications are due the last Thursday of the month prior to the meeting. News of Operation Round Up giving is provided in the Ruralite magazine following committee meetings.

If you have any questions please feel free to contact me, Charitable Trust Coordinator, at 541-929-8530 or [info@cpi.coop](mailto:info@cpi.coop).

Sincerely,

Jon Kloor  
Chief Member Officer

Please send applications to:

Email: [info@cpi.coop](mailto:info@cpi.coop)

Mail: CPI Charitable Trust, PO Box 1180, Philomath, OR 97370

6990 West Hills Rd.

PO Box 1180

Philomath, OR 97370

(541) 929-3124

(800) 872-9036

FAX (541) 929-8673

[www.cpi.coop](http://www.cpi.coop)



# **CPI Charitable Trust Grant Guidelines**

## **Objectives**

The CPI Charitable Trust is committed to enhancing the quality of life within CPI's service territory by providing financial support to nonprofit organizations and, in exceptional cases, individual CPI members facing crisis situations. The Trust prioritizes funding for essential needs, as determined by the CPI Charitable Trust Committee through a thorough process of investigation, evaluation, and comparison of grant applications.

## **Eligibility**

Grants are awarded to organizations and programs that serve communities within CPI's service territory, regardless of whether the organization itself is a CPI member. Eligible organizations must meet the following criteria:

- Be a nonprofit entity, typically with tax-exempt status under Internal Revenue Code Section 501(c)(3). Exceptions may be considered on a case-by-case basis at the discretion of the CPI Charitable Trust Committee.
- Demonstrate a clear commitment to improving the quality of life in CPI's service territory through programs aligned with the Trust's funding priorities.

## **Funding Priorities**

The CPI Charitable Trust supports initiatives that align with in following priorities:

### **1. Emergency and Public Safety**

Programs and organizations that address urgent community needs and enhance public safety, including:

- Fire departments and emergency responder agencies.
- Domestic violence shelters and support services.
- Emergency housing programs.
- Food banks and hunger relief initiatives.
- Elderly services and care, such as hospice programs.

### **2. Education and Youth Development**

Extracurricular programs and initiatives that foster student growth and well-being, with priority given to projects that:

- Promote leadership, academic achievement, or personal development.

- Address social challenges, such as substance abuse or mental health, or provide essential support like meals and clothing for children.
- Encourage wellness, positive behavior, or community engagement.

### **3. Economic and Community Development**

Initiatives that stimulate economic growth or provide tangible community benefits, such as:

- Job creation or workforce development programs.
- Community infrastructure or revitalization projects.
- Programs that enhance local employment opportunities for CPI members.

### **4. Environmental Stewardship and Quality of Life**

Projects that promote environmental sustainability or enhance community well-being, including:

- Environmental education or stewardship initiatives.
- Programs that improve access to recreational or cultural resources.
- Leadership development focused on environmental or community improvement.
- Animal rescue and services organizations that promote animal welfare within the community.

## **Funding Restrictions**

To ensure alignment with the Trust's mission and responsible stewardship of funds, the following are generally ineligible for funding:

- Political organizations, lobbying activities, or election campaigns.
- Endowment funds or annual fundraising drives.
- General operating expenses, including salaries, utilities, advertising, or start-up costs.
- Capital campaigns or construction projects.
- Scholarship programs or school/sports sponsorships.
- Organizations with national affiliations, unless their local programs directly benefit CPI's service territory.
- Fundraising events or activities.
- Electrical work performed by CPI for organizations.
- Payment of electric bills for individuals.

Exceptions to these restrictions may be considered at the CPI Charitable Trust Committee's discretion, based on the specific circumstances and alignment with the Trust's objectives.

## **Grant Limits**

- **Organizations:** Eligible organizations may request up to \$5,000 per quarterly grant cycle, with a maximum annual contribution of \$5,000 per organization.

- **Individuals:** CPI members facing crisis situations may apply for individual grants, limited to \$2,500 per household per calendar year. Individual grants are subject to rigorous evaluation and approval by the CPI Charitable Trust Committee.

## **Application and Reapplication**

Organizations may submit applications during each funding cycle, held in April, August, and November. Reapplication is permitted; however, prior funding does not guarantee future awards. All applications are evaluated based on merit, alignment with funding priorities, and available resources.

# APPLICATION FOR DONATION FOR ORGANIZATION/AGENCY

1. Name of Organization: \_\_\_\_\_

2. Address: \_\_\_\_\_

\_\_\_\_\_

3. Phone Number: \_\_\_\_\_  
(work)

4. Contact Person: \_\_\_\_\_  
(name) (title)

5. Is organization requesting funding exempt from payment of income tax? Yes No

If yes, Tax-ID # \_\_\_\_\_

A copy of letter (Form 501[c]3 from Internal Revenue Service must be attached.

6. Please attach agency's copy of financial statement(s) for most previous year.

7. Number of individuals, families or groups served by your agency in last year: \_\_\_\_\_

8. What area does your agency serve? \_\_\_\_\_

\_\_\_\_\_

9. Please state purpose of your Organization/Agency request: (Include amount requested and specify how funds will be used.)

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\_\_\_\_\_

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\_\_\_\_\_

10. List other sources of funding for purpose of request described above:

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11. How are your agency's programs measured for effectiveness?

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12. Please list three references:

Name

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Address

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Name

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Address

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Name

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Address

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The information contained in this statement is for the purpose of obtaining funding from the Consumers Power Charitable Trust on behalf of the undersigned. Each undersigned understands that the information provided herein is used in deciding to grant funding, and each undersigned represents and warrants that the information provided is true and complete and that the Consumers Power Charitable Trust may consider this statement as continuing to be true and correct until a written notice of a change is provided. The Consumers Power Charitable Trust is authorized to make all inquiries they deem necessary to verify the accuracy of the statements made herein.



CONSUMERS POWER INC.

NAME OF ORGANIZATION

SIGNATURE OF REPRESENTATIVE

DATE