

Community Foundation Sums Up the Year

by Anne Grodin, Chair

We are pleased to announce the recent Excellence Grants to local non-profit groups. These grants, along with donor directed grants total 55 gifts of more than \$170,700 since inception. The Lafayette Community Foundation was formed in to raise money for a new library, and to help raise funds for local charitable groups. Now that the fundraising for the construction of the new library building is complete, we continue to need your support for local charities that depend on the Community Foundation for supplemental funding. Many of them do not have the budget to get the word out about their good work. Excellence grants have been used to leverage more funds by showing that they have local support.

The Lafayette Community Foundation has learned a lot about philanthropy over the years, and at this time we are graduating from under the wings of the East Bay Community Foundation. The Lafayette Community Foundation has always been a 501(c)(3) charitable organization, but also had the status as a supporting organization of the East Bay Community Foundation. With mutual respect and agreement, the Lafayette Community Foundation has now become independent from the EBCF, and has received official notification from the Internal

Revenue Service, which governs such entities.

We have reached a milestone! The community has shown an overwhelming support for the new library, with funds raised totaling over \$12.7 million. The Board of Directors of the Lafayette Community Foundation is now turning over these funds to the newly created Lafayette Library and Learning Center Foundation to concentrate its support solely on the new library. What a wonderful community that we live in -- to have such strong support for a local project.

In looking at our financial report it may look like we have a lot of money, but as of November 1, all the library funds were turned over to the new library foundation. Our first major project funded! Now the Community Foundation is looking to the future again.

Your support of the Lafayette Community Foundation has enabled us to grow in these few short years into an organization that has enabled many small local organizations to better serve the needs of our community, and to help build the library. We have been able to give away approximately \$20,000, locally to small organizations every year, and hope to increase this. We need your continued ongoing generous support, please give locally!

LCF Board of Directors:

Kathy Bowles | Phil Chernin | Sereta Churchill | Dean Coons | Ann Denny | Marechal Duncan
Teresa Geringer | Anne Grodin, Chair | Don Jenkins | Lois Laine | Kathy Merchant | Anne Mitchell
Cheryl Noll | Anita Rama | Jeff Rosenthal | Fran Sticha | Don Tatzin



Foundation Funds Report • July 2006 to June 2007

	General Fund ¹	Building Fund	Children's Room	History Room	Learning Center	Friends Fund	Endowment Fund	Rotary Funds	Total
Beginning Balance (7/1/06)	37,415	11,656,037	29,293	199,479	101,635	32,158	150,555	11,832	12,218,404
Income									
Donations	22,740	126,215			16		16,000		164,971
In-Kind Donations	3,250	23,236							26,486
Event Income	10,160								10,160
Investment Activity	2,113	399,583	1,307	7,549	3,826	1,436	3,660	1,984	421,458
Total Income	38,263	549,034	1,307	7,549	3,842	1,436	19,660	1,984	623,075
Expenses									
Lafayette Excellence Grants	19,600								19,600
Donor Advised Grants	150								150
Library Project		78,230					49		78,279
Senior Project	77								77
Development & Donor Communications	15,186								15,186
Administrative Expenses ²	3,504								3,504
EBCF Charges ⁴	539	3,893					568	162	5,162
Investment Expenses								70	70
Total Expenses	39,056	82,123					617	232	122,028
Ending Balance (6/30/07)	\$36,622	\$12,122,948	\$30,600	\$207,028	\$105,477	\$33,594	\$169,598	\$13,584	\$12,719,451

Combined Library Building Funds are \$ 12,669,2453

(1) The General Fund includes Restricted Funds for Open Space: \$500, Parks and Creeks: \$100, Town Hall Building: \$1,722 and Step Up For Kids: \$350.
(2) Administrative Expenses include such items as accounting fees, bank fees, postage and telephone service.
(3) Of the Combined Library Funds \$3,244,683 are outstanding pledges. \$750,000 of the Building Fund is a pledge by the Friends of the Lafayette Library to the City of Lafayette. \$1,500,000 of the Building Fund has a number of contingencies that must be met prior to the release of funds. All contingencies have been met and funds received, but after June 30, 2007. To date, the library project expenses have been held to 5.3% of the combined library income.
(4) The Lafayette Community Foundation from its inception has maintained distinct and separate fund accounts within its balance sheets to protect designated funds by donor. The Lafayette Community Foundation is a nonprofit public benefit corporation that is a supporting organization of the East Bay Community Foundation (EBCF). Both the LCF and the EBCF are 501(c)(3) organizations. Neither is a private foundation within the meaning of Sections 509(a) of the Internal Revenue Code. All donations are tax deductible, subject to provisions of the IRS Code Sections 170. Tax ID # 80-0022897.
FOUNDATION FUNDS REPORT - JULY 2006 to JUNE 2007

Excellence Grants for Fall 2007

Town Hall • Awarded \$7,500

Town Hall Theater will receive \$7,500 to help it meet a matching grant to renovate Town Hall. The funds will provide for new carpeting, new flooring for the restrooms, and other up-grades in the restrooms. A new drinking fountain, and new electrical work for the theater will be included. Most of the renovations will be for safety improvements and ADA compliance. Town Hall Theater promotes education in the arts for members of the local community and beyond. They provide innovative educational programs to over 600 young actors every year, ages 3 to 18.

Gold Coast Chamber Players, Phase III • Awarded \$2,500

The Gold Coast Chamber Players have developed a unique program that the Community Foundation has funded is several phases. Topic in Tempo uses classical music to awaken students to the arts and enhance their learning experience. These programs have been in Acalanes and Campolindo High Schools, and will now be in the elementary schools. There are teacher workshops to introduce music in context in history, English, and science classes as a combination curriculum enriched with music.

Excellence Grants for July 1, 2006-June 30, 2007

Gold Coast Chamber Players, Phase I • Awarded \$4,000

Lamorinda Petanque Club • Awarded \$1,000

Lamorinda Petanque Club was awarded \$1,000 for the completion of a reconstructed and relocated Petanque court at the Lafayette Community Center. Petanque is traditionally played with metallic balls on a dirt or gravel surface. The object of the game is to throw the balls so that they land closer to the small ball (cochonnet or jack) than those of your opponent. The club meets weekly at the Lafayette Community Center. All are welcome, visit www.lamorindapetanque.com.

Futures Explored Inc., Huckleberry Cafe • Awarded \$5,000

Futures Explored, Inc. was a winter 2006 recipient of a \$5,000 grant to assist in their expansion of Huckleberry Cafe, by purchasing commercial quality kitchen appliances. A vocational training and employment food service program for developmentally disabled adults to give them the skills to live independently and be financially self-sufficient. To learn more see www.futures-explored.org.

Gold Coast Chamber Players, Phase II • Awarded \$3,200

Assistance League of Diablo Valley • Awarded \$1,800

The Assistance League of Diablo Valley received a grant of \$1,800 for their Foresight Program, which provides vision and hearing screening for preschoolers.

Lafayette Library • Awarded \$2,000

Lafayette Library's new Lamorinda Reads is a program sponsored by the Libraries for the three cities of Lafayette, Orinda and Moraga. Over a six-week period this fall residents were encouraged to read the same book, Down to a Soundless Sea by Thomas Steinbeck. There were a variety of discussion and enrichment events in the three cities. Books were available free not only in the library, but coffee houses and around town, for everyone to read and then pass on. The grant of \$2,000 helped to purchase books.

Lafayette Senior Transportation Program • Awarded \$5,000

The Lafayette Senior Transportation Program, \$5,000 was awarded to help seniors with a helpful door-to-door transportation service that will enable many seniors to stay in their homes, after they have given up their cars. Some other programs only offer curb-to-curb service, but many frail seniors need that extra help to be able to make doctors appointments or other errands. The Lafayette Senior Transportation Program is in conjunction with the City of Lafayette and the other Lamorinda cities. For more information or a ride call 284-5546.

How to Apply for An Excellence Grant

Non-profit charitable groups can apply for an Excellence Grant from the Lafayette Community Foundation by sending a letter, no longer than 2 pages, stating the purpose for which you request funding, and filling out the form on our website at

www.lafayettecommunityfoundation.org. Include information about your organization and a copy of your tax-exempt status. Mail to Grants Coordinator, Lafayette Community Foundation, P.O. Box 221, Lafayette, CA 94549.

Application deadlines:

March 31st for Spring Excellence Grant awards, and **September 30** for Fall grants.

Year-end IRA donations

Over 70 1/2 and must take an IRA distribution? The IRS special tax-free distribution—if given to charity—expires this December 31, 2007. This rule enables you to donate all or part of your required distribution, up to \$100,000, without paying tax on the

distribution. You must have the check made directly to the charity from your IRA account, for example to the Lafayette Community Foundation. Please talk to your financial advisor for more details.

LCF Partners with Chamber of Commerce

The 5th Annual Taste of Lafayette -- Restaurant Walk held last May was a sold-out success for the Chamber of Commerce and the Lafayette Community Foundation.

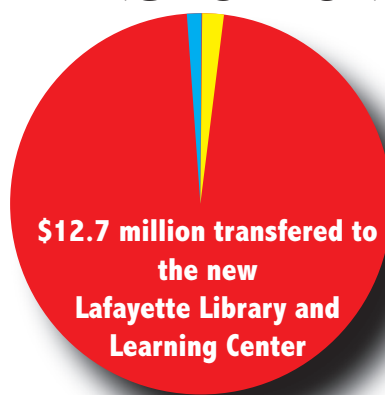
Ticket holders strolled down Restaurant-Row while sampling Lafayette's signature cuisine from 17 eateries. The evening starts with a silent auction and balloon pop held in Plaza Park with all proceeds going to LCF. Chamber of Commerce also shares a portion of ticket sales with the Community Foundation. C.E.M Development and Wine Thieves provided wine, and appetizers are served, also great music from Generations in Jazz. The evening concluded with everyone



Cal & Virginia Fox at the Taste of Lafayette 2007

returning to the Plaza Park for dessert. Save the date for next year's Taste of Lafayette -- Tuesday-- May 20, 2008.

BALANCE OF FUNDS



Library Fund General Fund Rotary Fund

This chart represents the assets of the Lafayette Community Foundation and the \$12.7 million that was transferred to the new Lafayette Library and Learning Center Foundation. The exact amount with interest calculations will be reported in the next annual report, as the transfer is taking place as we go to print.

The Lafayette Community Foundation will continue to serve the needs of the community meeting new visions.

New Foundation created

– Lafayette Library and Learning Center Foundation

The Lafayette Community Foundation has formed a new foundation dedicated to the new Library and Learning Center. This past summer and fall new board members were recruited to provide leadership and stewardship to sustain the facility and deliver programs that offer an accessible, enriched learning environment for our community. As of November 1, 2007 the funds that were raised by the Lafayette Community Foundation were passed to the new board to implement the vision of the community to build and open the doors of the state of the art Library and Learning Center. A few board members from the Community Foundation will serve on the new Lafayette Library and Learning Center Foundation (LLLCF) board for a smooth transition, but most are new. They come from all areas of Lafayette, and have a variety of backgrounds and skills that are needed to sustain the new facility and programs.

LLLCF Board of Directors:

Kathy Merchant - President, Jim Cunha - Treasurer, Anne Grodin - Secretary, Kathy Bowles, Scott Elliott, Roger Falcone, Teresa Geringer, Lamont Gilbert, Mike Gilson, Bob Gotelli, Rita Lorfida, Jack Jenkins-Stark, Todd La Porte, Karen Mulvaney, Bret Peterson, Margaret Race, Janet Tittiger, Hugh Winig, Don Tatzin - City Council Member ex-officio

Senior Liaison Committee

by Anita Rama

After successful completion of fund raising and laying the foundation for the Lafayette Library and Learning Center, the Board of Directors of Lafayette Community Foundation began to look into future viable projects. The Board saw a need for services for the senior citizens of Lafayette, and a study committee was formed.

The committee invited 24 representatives of organizations that provide services to seniors in Lafayette to a workshop on May 18, 2007. This meeting served as an overview session and helped to learn about various services that are currently available, and various needs that are not met. The following are the members of the committee: LCF Board members Marechal Duncan (chair), Kathy Bowles, Kathy Merchant, Lois Lane, and Anita Rama; and from the Senior Services Commission Ruth Mc Cahan, Mary Miller, Barbara Schuh and Sandra Hahn.

A Directory for all the services that are currently available for Lafayette seniors, was identified as a need. Commissioner Barbara Schuh of Companion Care graciously accepted this task, produced and financed a directory through her agency. Over 3000 copies of this directory are now available for distribution at several Lafayette locations.

In addition members of the Liaison Committee attended numerous meetings of the Senior Housing Task Force, and supported the success-

ful proposal by the Senior Services Commission to the City Council to form a task force to implement a senior needs assessment for Lafayette.

On Nov. 13, 2007, 22 representatives of the community senior service organizations and members of the Liaison committee met for a brainstorming session led by Kathy Merchant and Kathy Bowles for senior needs. Future meetings will focus on a Symposium to be held early next year. The goal of the symposium is to attract the seniors to attend and participate voice their concerns.

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A sub-committee has been formed to discuss the details. The Senior Liaison Committee is energized and focused to achieve an outcome that will be meaningful for the senior citizens of Lafayette.

Senior Directory

The Lafayette Community Foundation's Senior Liaison committee has produced a Directory of service providers in partnership with the City of Lafayette's Senior Services Commission. Services covered range from assisted living facilities and nursing homes to legal assistance and geriatric care management, as well as senior activities and religious groups. If you would like to receive a copy, call 284-8214, or pick one up from the Chamber of Commerce or Senior Service Offices at 500 St. Mary's Road.

Invest in Lafayette

Contribute to the Lafayette Community Foundation!

The Lafayette Community Foundation (LCF) serves as a vital community resource, investing in programs and projects that promote and enhance the civic, cultural, educational and environmental health of Lafayette.

The Foundation provides donors the opportunity to build a legacy by investing in Lafayette and beyond, through identification and support of community needs and organizations.

LCF Supports

- Building a new library • Student arts & science programs • Senior citizen services • Expansion of children's sports facilities
- Development of parks & open spaces • Local arts—music, theater, visual

www.lafayettecommunityfoundation.org

LAFAYETTE COMMUNITY FOUNDATION

I/We wish to donate to the Lafayette Community Foundation (LCF):

\$1,000 \$500 \$250 \$100 Other \$ _____

Please use my gift for:

LCF General Fund Specific project _____

Name _____ (please print it as you'd like it to appear on our donor recognition)

Ms. Miss Mrs. Mr. Mr. & Mrs.

Address _____

City _____ State _____ Zip _____

Email _____

Please accept my gift in the form of:

Check (payable to LCF)

Charge to: VISA Mastercard Discover

Credit card # _____ Security Code _____

Name on card _____ Exp. Date _____

Signature _____

Please contact me about Planned Giving.

Please call me about transferring stock.

Telephone (_____) _____

I would like my gift to be anonymous.

Make checks payable to LCF, a 501(c)(3) non profit organization. Tax ID #80-0022897. All contributions are tax-deductible to the extent allowable by law.

Please mail to: **Lafayette Community Foundation • P.O. Box 221 • Lafayette, California 94549-0221**

Thank you for your gift