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@LdnCommFdn

April 2017

Ms. Betty Mercier
The Corporation of the City of London
PO Box 5035
London, ON N6A 4L9

Dear Ms. Mercier:

Greetings from London Community Foundation! We are pleased to provide the enclosed Fund Statement for the year ended December 31, 2016. This summary offers a snapshot of the recent activities of the London Endowment for Heritage Fund.

Did you know that, over the past five years, this fund has granted \$85,000 to charitable programs in our community?

You are part of a fellowship of like-minded people with a long-term, strategic approach to philanthropy – a fellowship that allowed LCF to grant \$3.4 million to 179 charities in 2016. This definitely illustrates the power of endowment in strengthening our community!

Thank you for your spirit of partnership. Please feel free to contact me if you have any questions about this report or if I can provide any support or assistance; I can be reached at lrunciman@lcf.on.ca or 519.667.1600 ext. 105.

With warm regards,

Lori Runciman

Lori Runciman
Director, Grants

It's a pleasure to partner with the City on this unique fund and grant programs!

P.S. Providing you with excellent service is very important to us – and we'd like to know how we're doing. Could you please take a few moments to complete the enclosed, brief survey? (It can also be found online at: www.surveymonkey.com/r/lcfdonorsurvey)

Donor Advised Fund Statement

London Community Foundation | Covent Garden Market

130 King Street | London Ontario CANADA N6A 1C5

Charitable Registration #10764 1953 RR0001

London Endowment for Heritage Fund

for the year ended December 31, 2016

	Capital	Undistributed Income	Total
Balance January 1, 2016	\$417,599.69	\$71,966.17	\$489,565.86
Donations to capital	21.00	-	21.00
Investment income (loss)	-	36,793.32	36,793.32
Administration fee	-	(9,931.80)	(9,931.80)
Granted from fund	-	(20,800.00)	(20,800.00)
Net Change	21.00	6,061.52	6,082.52
Balance December 31, 2016	\$417,620.69	\$78,027.69	\$495,648.38

Available to Grant in 2017 **\$18,800.00**

2016 Granting Activity	Purpose	Amount
Congregation or Shalom at London	Historical Boards	\$2,000.00
City of London	2016 Grants	\$17,800.00
Jet Aircraft Museum	Travelling Aircraft	\$1,000.00

\$20,800.00

Donations to capital: Endowed donations received between January 1 - December 31, 2016

Flow through: Non-endowed donations received between January 1 - December 31, 2016

Capital preservation: Adjustment to protect purchasing power of endowment

Investment income: Investment income earned on endowment

Administration fee: Cost recovery fee

Granted from fund: Amount granted from fund between January 1 - December 31, 2016

Contact Martha Powell
519-667-1600 ext 1010
mpowell@lcf.on.ca



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Donor Survey

You are an important stakeholder at London Community Foundation – and we want to provide you with the best possible service. Let us know how we're doing! Please take a few moments to complete this brief survey and then return it in the enclosed, stamped envelope. It can also be completed online at: www.surveymonkey.com/r/lcfdonorsurvey

1. How strongly do you agree that London Community Foundation makes it easy for you to achieve your philanthropic goals? Please circle one.

Strongly agree Agree Agree somewhat Do not agree

2. How satisfied are you with the donor services provided by London Community Foundation? Please circle one.

Very satisfied Satisfied Somewhat satisfied Not satisfied

3. How likely is it that you will continue to give to London Community Foundation? Please circle one.

Very likely Likely Somewhat likely Not likely

4. How likely is it that you would recommend London Community Foundation to a family member, friend or colleague? Please circle one.

Very likely Likely Somewhat likely Not likely

5. Which option best describes the type of relationship you'd like to have with London Community Foundation around giving decisions? Please check one.

- I'd like to be self-sufficient in my giving, relying on my own knowledge.
- I'd like some assistance from the Foundation to help guide my giving decisions.
- I'd like to think of the Foundation as my partner, providing advice and expertise.

Do you have any comments on the type of relationship you'd like to have with LCF?

6. Our donors have said that the Foundation is like a pension plan for our community. In your opinion, is London Community Foundation the go-to place in London for strategic, long-term giving? Please check one.

- Yes, it is.
- I'm not sure – I'd like to learn more.
- I don't think of the Foundation this way.

Do you have any comments on this?

7. Do you have specific philanthropic goals? For example, giving and granting with your children through a family fund, or honouring the memory of a loved one by supporting a specific cause? Please comment.

8. Have you considered London Community Foundation with regard to your estate planning? Please check one.

- Yes – and I've made a commitment in my will.
- Yes, I'm considering leaving a bequest to the Foundation.
- Somewhat – but I'd like to learn more.
- I've never thought of the Foundation for my estate planning.

Do you have any comments on this?

9. Please let us know how you feel about receiving these items by checking one of the right-side boxes for each:

	Love to receive	Don't mind receiving	Doesn't matter to me
Fund statements			
Annual reports including donor listings			
Fall updates from President & CEO			
Emails updating you when there is LCF news			
Impact reports and stories on your grants			
Invitations to events with fellow donors			
Invitations to educational events (e.g. strategic giving and tax advantages)			
Invitations to events celebrating community impact			

Do you have any comments on this – the items you currently receive from the Foundation or what you'd like to receive?

10. How do you prefer to stay connected with London Community Foundation? Please check your top preferences.

- Email
- Events
- Personal meetings
- Phone
- Regular mail
- Social media

Do you have any comments about your communication preferences?

**11. Is there a specific area where we're missing the mark in our overall service to you?
How can we improve? Please comment.**

12. Do you have any additional comments for us?

Your Contact Info (optional – you may choose to remain anonymous)

Name:

Phone number:

Email address:

Thank you for taking the time to provide us with your candid feedback!