

**LPS Education  
Foundation**

*Serving Livonia Public Schools*

# *2013-14 Annual Report*



***2013-14***  
***Annual Report***

## *Message from the President*

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November 2014

Dear Friends,

This was a very special year for the LPS Education Foundation as we celebrated our 10th anniversary. We are proud of our accomplishments in supporting our mission with the Foundation's exciting programs and events.

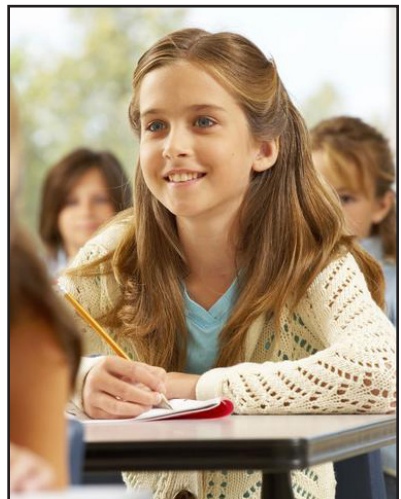
We are extremely grateful to the many donors and volunteers who so generously contribute to the Education Foundation. Your growing support exemplifies your community spirit and shows that the important work we do is something that so many want to be part of.

We enthusiastically look forward to the future with new opportunities and to continue to have a meaningful impact in the lives of our students in the Livonia Public Schools.

Sincerely,

*Diane Policelli*

Diane Policelli, President  
LPS Education Foundation



## *Board of Directors*

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## ***Our Mission***

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“The mission of the Livonia Public Schools Education Foundation is to enlarge the resources available to the school district which will foster and expand educational opportunities for programs impacting students and to provide the opportunity for LPS parents to begin planning for their student’s post-secondary education.”

The Foundation offers a powerful and effective vehicle for directing contributions to benefit public education in portions of Livonia and Westland, Michigan.

## ***Our Core Values***

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We will strive to directly impact student learning by:

- ✓ Putting resources into the classrooms
- ✓ Improving student achievement
- ✓ Providing financial resources for items the district cannot fund

We will strive to ensure integrity by:

- ✓ Using ethical fundraising techniques
- ✓ Maintaining sound financial practices

We will strive to provide the means to assist our students in their post-graduate education by:

- ✓ Establishing the opportunity to subsidize a college savings plan
- ✓ Providing educational savings plan information for parents and students



## *History of the LPS Education Foundation*

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Nearly two decades ago, the financial situation of the Livonia Public Schools was radically different than today. At that time, the district was experiencing increasing enrollments, the state and national economy were robust, and the negative impact of an economic downturn was yet to be felt.

In 1997, the Board of Education commissioned a feasibility study to be conducted regarding the establishment of a school district foundation. Neighboring school district foundations were surveyed, research was gathered and analyzed, and consultants provided advice. After reviewing the results, the Board of Education decided against establishing a foundation at that time.

In late 2002, a follow-up study was conducted, at which time conditions had changed drastically and the need for an independent funding source that might aid the district, was seen as both feasible and necessary. The following year, events were set in motion that resulted in the formalization of the Livonia Public Schools Education Foundation in early 2004.

First, all the documents required to legally establish a foundation needed to be written and submitted, including Articles of Incorporation, By-Laws, application for 501(c)3 status with the IRS, and other legal documents.

Next, a Board of Directors was selected and agreed to serve. The officers were elected for positions of President, Vice President, Secretary, and Treasurer.

Board members developed a mission statement, guiding principles, core values, goals and objectives, logo design, an information dissemination process, fund-raising strategies, and a host of other necessary tasks.

We have joined a national movement that is growing every year. According to the National School Foundation Association, \$31.59 million was donated to education in the U.S. in 2003, the second largest recipient category (behind religion) of philanthropic donations in the U.S. It is projected there will be an intergenerational wealth transfer occurring over the next 25-35 years, yielding between 15 and 40 trillion dollars. The Giving USA 2001 reports that many major donors who give to education are switching their financial support and focus from college and universities to elementary and secondary schools, and are finding educational foundations an excellent way to do that.

Commencing in Fiscal Year 2008, the Foundation initiated The Competitive Edge College Savings Program, which encouraged parents of new first graders to establish a college savings (529) plan. Starting in 2010, due to the overwhelming response from parents who are anxious to set up a college savings plan for their children at an early time, the Foundation offered the Competitive Edge program beginning with students who enter kindergarten. The Foundation provided an initial amount in a holding account for each kindergarten student whose parents registered for the program during this fiscal year.

With these facts in mind, and the firm belief that our teachers and administrators are committed to providing a high quality education for our community's children, we believe the growth and development of the Livonia Public Schools Education Foundation will play a vital role in the continued excellent educational experience offered in the Livonia Public Schools.

We have a dedicated and talented Board of Directors, energetic and hard-working volunteers, and great partnerships with the business community. However, we have much to do.

We are grateful to all who have contributed time or money to the Foundation this year. We are optimistic about the future, and ask you to join us in teaming together to ensure learning for all.



## *Competitive Edge College Savings Program*

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The goal of the Livonia Public Schools Education Foundation is to provide a unique opportunity for LPS parents to begin planning for their children's post-secondary education early on, and help set aside money for their future educational expenses.

The Competitive Edge is an exciting ongoing college savings program that was initially offered to each student entering first grade.

The Foundation provided an opportunity for the family of each first grade student to set up an IRS section 529 college savings plan.

Due to the positive response of parents who wanted to start saving early, starting in 2010-11, the program was offered to each student entering kindergarten. Currently over 1200 students are enrolled.

Not only does this program provide a great service to LPS students and their families, the Foundation also sees this as an added benefit to attract and retain families in the community. This unique program can help maintain the vibrance of our community and consequently, each family it attracts brings state funding to the school district, meeting the foundation's mission "to enlarge the resources available to the school district which will foster and expand educational opportunities."

It truly can provide a "competitive edge" over our surrounding communities.





## ***Funding Sources***

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Currently, donations have been received from the following sources:

1. Individual Donors
  - a. Retirees
  - b. Employees
  - c. District Residents
  - d. Alumni
2. Corporate Sponsors
3. Back to School events
4. Honorary Donations
5. Annual Luncheon

## ***Back to School Event***

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The LPS Education Foundation partnered with LPS to hold a Bounce Back to School celebration in August 2013. What a hit! Over 2,000 friends and neighbors attended. A great time was had by all celebrating the start of a new school year.

## ***Annual Luncheon***

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Murray Feldman, long-time Detroit newscaster and anchor of Fox TV 2 News at 5:30 pm was the special guest speaker for the fourth annual



fundraising luncheon sponsored by the LPS Education Foundation. Hosted by WJR Radio Sports Director Steve Courtney, over 200 community members heard Feldman speak on the topic: “Things are OK, and that’s the new great.” He lauded the work of the Foundation in raising funds to help prepare students academically and financially for college that can only help in the economic turnaround currently in progress.

## ***LPS Education Foundation welcomes Honorary Board members***

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The LPS Education Foundation is raising its profile by bringing well-known community leaders onto an Honorary Board of Directors. The list spans local political, business, religious and educational sectors of the community, bringing an array of civic and community influence to the Foundation.

The Honorary Board includes: Livonia Mayor Jack Kirksey, Westland Mayor Bill Wild, State Rep. John Walsh, State Senator Glenn Anderson, Livonia City Clerk Terry Marecki, Livonia City Treasurer Dennis Wright, former Livonia Mayor Robert Bennett, former Livonia Mayor Jack Engebretson, Ruth Ann Brown, Jim Cambridge, Martin Carter, Steve Courtney, Chuck Dardas, Jim Fausone, Dr. Conway Jeffress, Sister Rose Marie Kujawa, John McElroy, Kathleen McIntyre, John Rogin, Fr. George Shalboub, Mark Shobe, David Spivey, Carol Strom, Marty Talty, Kit Tennyson, Dan West, John Wilkerson and Brian Wolverton.

## ***LPS Education Foundation awards grants to 12 teachers for the 2013-2014 school year***

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Twelve LPS teachers were awarded grants worth over \$25,000 by the Foundation this year. The winning projects represented innovative teaching strategies designed to benefit students from preschool through high school. The Foundation inaugurated this annual grant program with a goal to do something immediate to enhance teaching and learning in the district.



***LPS Education Foundation***  
***Financial Statement***  
***Fiscal Year July 1, 2013 - June 30, 2014***

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**Revenue/Gains**

Contributions	\$ 69,610
Interest Earned	11,514
Special Events (Net)	21,948
Investments	13,960

**Total Revenues/Gains** **\$117,032**

**Expenses**

Grants	\$ 29,076
Investment Expenses	2,114
Management & General	13,663
Fundraising	14,908

**Total Expenses** **\$ 59,766**

**Increase in Assets** **\$ 57,266**

**Total Assets (End of the Year)** **\$ 656,658**



## ***LPS Education Foundation***

### ***2013-2014 Corporate Donors***

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#### **Valedictorian's Circle (\$50,000 and Above)**

DFCU Financial \*

Livonia Public Schools Employees \*

St. Mary Mercy Hospital of Livonia \*

#### **Salutatorian's Circle (\$10,000 - \$49,999)**

Bill Brown Ford, Inc. \*

Livonia PTA's/PTSA's \*

Michigan Educational Credit Union \*

Roush Industries

#### **Honor's Circle (\$5,000 - \$9,999)**

Alpha USA

Bright House Networks

#### **Friends' Circle (\$1,000 - \$4,999)**

Cheryl Bowker Allstate Agency

Community Federal Credit Union

Dr. Randall Shaw & Dr. Nicole Jane Orthodontics

Livonia AM Rotary

Parkside Credit Union

Tennyson Chevrolet

TRW Automotive \*

Westland Shopping Center

(\* Indicates Founding Partners)

#### **Gifts in Kind**

Special thanks to St. Mary's Cultural and Banquet Center for sponsoring the Foundation's Annual Luncheon;

The Livonia Observer for advertising fund-raising events as an in-kind contribution; and Rock Out Entertainment for supporting the Back to School Party.

## *Corporate Donors – 2013-2014*

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Alpha USA  
Bill Brown Ford, Inc  
Bright House Networks  
Cheryl Bowker Allstate Agency  
Community Financial Credit Union  
DFCU Financial  
Livonia AM Rotary Club  
Livonia Observer Newspaper  
Livonia Public Schools Employees  
Livonia Public Schools PTAs and PTSAs  
    Buchanan Elementary PTA  
    Cass Elementary PTA  
    Holmes Middle School PTSA  
    Kennedy PTA  
    Riley Upper Elementary PTA  
    Stevenson High School PTSA  
    Webster Elementary PTA  
Michigan Educational Credit Union  
Orthodontics Office of Dr. Randall Shaw & Dr. Nicole Jane  
Parkside Credit Union  
Rock Out Entertainment  
Roush Industries  
St. Mary Mercy Hospital of Livonia  
St. Mary's Cultural and Banquet Center  
Stevenson Booster Club  
Tennyson Chevrolet  
TRW Automotive  
Westland Shopping Center



## *Livonia Public Schools Employee Donors*

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Abbey, Lisa  
Adams, Julie D  
Alles, Sheila A  
Anderson, Andrea R  
Anderson, Karyn L  
Anderson, Ronald J  
Archibald, Steven P  
Ashworth, Carola  
Baldwin, Kathy A  
Belcher, Sharon M  
Bentley, Matthew C  
Bice, Jan P  
Bickham, Janeane R  
Buffington, Beth A  
Bumpus, Terry A  
Burke, Denise M  
Byrne, Doreen J  
Calkins, Carim R A  
Campbell, Patricia E  
Cannell, Lisa M  
Carlini, Isolina D  
Casey, Kimberly R  
Cerny, Leslie W  
Christenson, Laurie A  
Cibor, Anne M  
Clay, Jennifer L  
Coggins, Kathleen M  
Coleman, Jacalyn D  
Considine, James M  
Cooke, Patricia A  
Coon, Sherrie A  
Curtis, Wendy A  
Daraskavich, Michael P  
Dazer, Caryl  
Decarli, Lynn S  
Demarco, Anthony C  
Deperro, Karen M  
Deperro, Kay M  
Dery, Carolyn M  
Dickenson, Geoffrey G  
Dillon, Karen S  
Dipaolo, Alphonse G

Doelker, Angela M  
Donagrandi, Kathleen  
Dordeski, Lidia  
Dubel, Patricia  
Dziedzic, Christina H  
Eddy, Kelly J  
Ehlendt, Linda M  
Evans-Ebling, Valerie D  
Ewing, Barbara A  
Fedoronko, Gayle L  
Fedraw, Judy M  
Foley, Julianne K  
Frame, Kathleen A  
Gajor, Christine M  
Garbutt, Annette M  
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Gibbons, James M  
Gord, Christopher D  
Grezak, Lawrence S  
Guerriero, Michelle A  
Haas, Janet L  
Hammye, Ronald D  
Hedden, Cathlene M  
Hedges, Debra K  
Heinrich, Claudia T  
Hinchman, Timothy R  
Hinze, Dennis A  
Horgan, Sean P  
Janowski, Carol M  
Janowski, Deborah A  
Jary, Sarah J  
Johnson, Debra L  
Jones, Barbara J  
Kaiser, Lisa M  
Kalec, Ann W  
Kaufman, Naneen M  
Keberly, Russell C  
Keimig, Linda M  
Keller, Mary Jo  
Keyshian, Elizabeth J  
Kieft, Jadie L  
Kish, Renee M

Kleimola, Christine N  
Koelzer, Patrick W  
Koziarski, Deborah O  
Lamour, Anita M  
Lank, Kristina A  
Lectka, Cindy J  
Lee, Kellee N  
Lemieux, Roberta K  
Licata, Susan E  
Liepa, Randy A  
Macek, Theresa J  
Macorkindale, Glenn S  
McConnell, Barbara K  
McDonald, Keith W  
McMuldroch, James  
Medellin, Jennifer L  
Miller, James D  
Miller, Marci L  
Miller, Shelly E  
Mitchell, Christine R  
Mitchell, David C  
Monasterski, Barbara D  
Natarajan, Uma  
Nathan, Michael C  
Nault, Colleen G  
Neilson, Julie P  
Nersesian, Lori H  
Noble, Catherine A  
Nowotny, Paula J  
O'Brien, Theresa L  
Oppermann, Gretchen G  
Oquist, Andrea L  
Orvis, Sarah J  
Owen, Ann M  
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Petitpas, Charles W  
Pilon, Mary  
Pinta, Stephanie J  
Posh, Heidi Bloom  
Price, Kathleen E  
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Schmidt, Craig R  
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Schroth, Laura M  
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Seay, James W  
Shanker, Debra Regina-Er  
Sheckell, Kenneth L  
Sieber, Tammy K  
Simon, Leigh R  
Sinning, Judith G  
Skelton, Marylee A  
Smith, Sherri L  
Sorge, Donna M  
Spangler-Timm, Tammy  
Sproule, Jason L  
Squirewell, Deborah J  
Stackpoole, Michelle A  
Strickland, Susan L  
Sweeney, Colleen  
Taddia, Kelly A  
Tafelski, Julie J  
Tanner, Lisa S  
Taylor, Stephen C  
Taylor, Terry E  
Timmerman, Pamela A  
Tullio, Mary K  
Tyranski, Kathleen A  
Walsh, Molly A  
Watts, Amy M  
Weaver, Mary K  
Wells-Biggert, Kristie S  
Wichmann, Corinne  
Willenborg, Daniel R  
Wischmeyer, Patricia J  
Yanka, Dale C  
Yost, Kathleen M  
Ziem, Donna  
Zimmer, Claudia R



## *Individual Donors*

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Mr. & Mrs. Bageris	
Mrs. Dorothy Bentley	In memory of my husband
Mr. & Mrs. Kenneth Bourgon	In memory of Robert Bentley and Dr. Charles Ruckhaber
Mr. George A. Calder	
Mr. & Mrs. Paul Condon	
Mrs. Danielle Daniels	In memory of Nancy Newman, Robert Bentley, & Charles Zoet
Mr. & Mrs. Murray Feldman	
Mr. & Mrs. Kent Gage	
Mr. Henry J. Guthard	
Mr. Richard Herrell	
Mr. James Karoub	
Mr. Raymond C. Keeling	
Mr. Jonathan Klosowski	
Mrs. Ava Langdon	In memory of my mother
Mrs. Grace MacFarland	In memory of Nancy Newman
Mrs. Mary Ann Marks	
Mr. & Mrs. Ernie Natalini	
Ms. Joanmary Nenninger	In memory of Jim Schottenhelm
Mr. & Mrs. James Policelli	
Mr. Christopher Rosemary	
Mrs. Thelma Ruckhaber	In memory of my husband
Mr. & Mrs. Douglas Scheel	
Mrs. Beverly Shafer	In memory of Jean Gordon
Mr. Thomas Snabb	
Mrs. Nancy Soderholm	
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*15125 Farmington Rd. Livonia, MI 48154*  
*A 501(C)3 Organization*  
*December 2014*  
*[www.lpsfoundation.org](http://www.lpsfoundation.org)*  
*Printed by: Livonia Public Schools*