

**Livonia Public Schools  
Foundation  
2011-12 Annual Report**



# Message from the President

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December 31, 2012

Dear Friends,

I would like to thank all of those who supported the Livonia Public Schools Foundation this year with their financial contributions or volunteered time. Your commitment to the Foundation directly enhances its mission to foster and expand educational opportunities for programs impacting students by building effective collaborations.

We are proud of our accomplishments for the past year. In August, the Back-to-School Event was a huge success with over 2,000 friends and neighbors attending. This celebration was a significant fund raiser for the Foundation. The 2nd Annual Foundation Luncheon took place in September, featuring University of Michigan's Athletic Director, David Brandon and emcee, WJR's Sports Director, Steve Courtney. The luncheon was enthusiastically attended and helped to raise funds for the Foundation's programs.

The Competitive Edge College Savings Program continues in its fifth year. The program offers a donation to each kindergarten student in the district and opens a 529 college savings program for them to help pay for the cost of the child's college education. In addition, seminars are held to educate the parents on the value of beginning a college savings plan early and give them the opportunity to manage their own 529 college savings program. All this is made possible through the generosity of our supporters.

Again, on behalf of the Directors of the LPS Foundation, I would like to thank all of you who supported the Foundation. I look forward to seeing you at our future events!

Sincerely,



Diane Policelli  
President  
Livonia Public Schools Foundation

## **Board of Directors**

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Diane Policelli, President

Lynda Scheel, Vice President

Ernest Natalini, Treasurer

Jay Young, Secretary

Dorothy Chomicz

Lorna Durand

Mayor Jack Kirksey

Dr. Randy Liepa, non-voting member

Patricia Mang, non-voting member

Steve Sciatto

Judee Taormina

Kim Ward

# History of the Livonia Public Schools Foundation

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Nearly a decade 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 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 age, 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 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.

## Our Mission

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“The mission of the Livonia Public Schools 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 postsecondary 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 postgraduate education by:

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

# Competitive Edge College Savings Program

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The goal of the Livonia Public Schools 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.

Starting in 2010-11, the program was offered to each student entering kindergarten.

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 very 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 Foundation partnered with LPS to hold a Bounce Back to School celebration in August 2011. What a hit! Over 2,000 friends and neighbors attended. A great time was had by all celebrating the return of school.





# **LPS Foundation**

## **Financial Statement**

### **Fiscal Year July 1, 2011 - June 30, 2012**

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#### **Revenues/Gains**

Contributions	\$ 91,031
Interest Earned	2,343
Special Events	14,531

**Total Income** **\$ 107,905**

#### **Expenses**

Grants	\$ 9,400
Operating Expenses	9,033

**Total Expenses** **\$ 18,433**

#### **Restricted Assets**

Investments	\$ 100,561
Custodial, held for students	70,620

**Total Assets** **\$513,032**



# **Livonia Public Schools Foundation**

## **2011-2012 Corporate Donors**

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

DFCU Financial \*  
Livonia Public Schools' Employees \*  
St. Mary Mercy Hospital \*

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

Bill Brown Ford, Inc. \*  
Livonia PTA's/PTSA's \*  
Michigan Educational Credit Union \*  
Michigan Education Savings Plan - TIAA-CREF \*  
Roush Industries

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

Alpha Group  
Bright House Networks  
Kopmeyer & Talty, P.C. \*

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

Alpha Delta Kappa - Tau Chapter  
Cheryl Bowker Allstate Agency  
Davenport University \*  
Ralph Thayer Automotive  
Dr. Randall Shaw, Dr. Nicole Jane and Dr. James Ginzler Orthodontics  
TRW Automotive \*  
Westland Shopping Center

(\* Indicates Founding Partners)

### **Gifts in Kind**

Special thanks to St. Mary Cultural and Banquet Center for sponsoring the Foundation's Annual Luncheon and to The Livonia Observer Newspaper for advertising fund-raising events as an in-kind contribution to the Foundation.

## Corporate Donors

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Alpha Delta Kappa - Tau Chapter  
Alpha Group  
Bill Brown Ford  
Bright House Networks  
Cheryl Bowker Allstate Agency  
Davenport University  
DFCU Financial  
Kopmeyer & Talty  
Livonia Observer Newspaper  
Livonia Public Schools' PTAs and PTSAs  
    Buchanan Elementary PTA  
    Coolidge Elementary PTA  
    Grant Elementary PTA  
    Holmes Middle School PTSA  
    Kennedy Elementary PTA  
    Livonia PTSA Council  
    Riley Upper Elementary PTA  
    Roosevelt Elementary PTA  
    Stevenson High School PTSA  
Livonia Public Schools' Employees  
Michigan Educational Credit Union  
Michigan Education Savings Plan & TIAA-CREF  
Orthodontics Office of Dr. Randall Shaw,  
    Dr. Nicole Jane, and Dr. James Ginzler  
Ralph Thayer Automotive  
Roush Industries  
St. Mary Cultural and Banquet Center  
St. Mary Mercy Hospital of Livonia  
TRW Automotive  
Westland Shopping Center

## Individual Donors

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Mrs. Dorothy Chomicz  
Ms. Gretchen Coles  
Dr. Conway Jeffress  
Mr. & Mrs. John Hiltz  
Mr. Raymond Keeling  
Ms. June Kendall  
Livonia AM Rotary Club  
Livonia Bentley Class of 1961  
Marion J. Nalepa  
Mr & Mrs. Francis Petersmark  
Mrs. Diane Policelli



## Donations in Memory of

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LEADS for William McMurtrey  
LEADS Retirees for John G. (Jack) McDonald  
Livonia Education Association for Jennice (Jen) Owen  
Livonia Education Association for Nancy Ellis  
MEA 7-D Coordinating Council for Olive Nenninger  
Ms. Jennifer Dallacqua for Charles Hebestreit  
Mr. Seymour Le Vine for William McMurtrey  
Mr. Arvids Liepa for Shirley Liepa  
Ms. Deborah J. Luczyn for William McMurtrey  
Mrs. Grace MacFarland for John G. (Jack) McDonald  
Mr. & Mrs. Glennon Nenninger for Olive Nenninger  
Mr. Eldon Price for William McMurtrey  
Mr. & Mrs. Chris Schulte for Frank Kozan  
Ms. Deborah Trombly for Charles Hebestreit

# Livonia Public Schools Employee Donors

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Abbey, Lisa	Dazer, Caryl	Hinze, Dennis A
Adams, Julie D	DeCarli, Lynn S	Horgan, Sean P
Allen-Myrold, Carla M	DeMarco, Anthony C	Janowski, Carol M
Alles, Sheila A	DePerro, Karen M	Janowski, Deborah A
Anderson, Andrea R	DePerro, Kay M	Jary, Sarah J
Anderson, Karyl L	Dery, Carolyn M	Johnson, Debra L
Anderson, Ronald J	Dickenson, Geoffrey G	Jones, Barbara J
Archibald, Steven P	Dillon, Karen S	Kaiser, Lisa M
Ashworth, Carol A	DiPaolo, Alphonse G	Kalec, Ann W
Barbuto, Abigail E	Doelker, Angela M	Kaufman, Naneen M
Belcher, Sharon M	Donagrandi, Kathleen	Keberly, Russell C
Benoit, Mary Patricia	Dordeski, Lidia	Keimig, Linda M
Bentley, Matthew C	Dubel, Patricia	Keller, Mary Jo
Bice, Jan P	Dziedzic, Christina H	Keyshian, Elizabeth J
Bickham, Janeane R	Eddy, Kelly J	Kieft, Jadie L
Buffington, Beth A	Ehlendt, Linda M	Kish, Renee M
Bumpus, Terry A	Evans-Ebling, Valerie D	Kleimola, Christine N
Burke, Denise M	Ewing, Barbara A	Koelzer, Patrick W
Byrne, Doreen J	Fedoronko, Gayle L	Lamour, Anita M
Byrne, Sheila M	Fedraw, Judy M	Lank, Kristina A
Calkins, Carim R A	Foley, Julianne K	Lectka, Cindy J
Campbell, Patricia E	Frame, Kathleen A	Lee, Kellee N
Cannell, Lisa M	Gajor, Christine M	Lemieux, Roberta K
Carlini, Isolina D	Garbutt, Annette M	Licata, Susan E
Casey, Kimberly R	Gentile, Rene	Liepa, Randy A
Christenson, Laurie A	Gibbons, James M	Macek, Theresa J
Cibor, Anne M	Gord, Christopher D	Macorkindale, Glenn S
Clay, Jennifer L	Guerriero, Michelle A	Markarian, Eric G
Coates, Douglas J	Haas, Janet L	Massucci, Lynn M
Coggins, Kathleen M	Hammye, Ronald D	Maxwell, Kathy A
Coleman, Jacalyn D	Hedden, Cathlene M	McConnell, Barbara K
Considine, James M	Hedges, Debra K	McDonald, Keith W
Cooke, Patricia A	Heinrich, Claudia T	McDowell, Donna M
Crosier, Donna	Hill, Deborah O	McMuldroch, James
Daraskavich, Michael P	Hinchman, Timothy R	McSorley, Kathy L

Medellin, Jennifer L  
 Miller, James D  
 Miller, Marci L  
 Miller, Shelly E  
 Mitchell, Christine R  
 Mitchell, David C  
 Monasterski, Barbara D  
 Morford, Emily C  
 Natarajan, Uma  
 Nathan, Michael C  
 Nault, Colleen G  
 Neilson, Julie P  
 Nersesian, Lori H  
 Noble, Catherine A  
 Norman, Deborah A  
 Nowotny, Paula J  
 O'Brien, Theresa L  
 Oppermann, Gretchen G  
 Oquist, Andrea L  
 Orvis, Sarah J  
 Owen, Ann M  
 Pearson, Bradley J  
 Peterson, Kathryn F  
 Petitpas, Charles W  
 Pilon, Mary  
 Pinta, Stephanie J  
 Posh, Heidi Bloom  
 Price, Christine M  
 Price, Kathleen E  
 Pritula, Michelle M  
 Roberts, Carl E  
 Romeo, Traci G  
 Rost, Brandy Quirk  
 Ruiz, Evelyn L  
 Santi, Cathleen R  
 Santi, John J  
 Schmidt, Craig R

Schnurstein, Michelle R  
 Schommer, Deborah M  
 Schroth, Laura M  
 Schulte, Christine M  
 Seay, James W  
 Shanker, Debra Regina-Er  
 Siewicki, Carolyn  
 Simon, Leigh R  
 Sinning, Judith G  
 Skelton, Marylee A  
 Smith, Julie E  
 Smith, Sherri L  
 Snabb, Marilyn P  
 Sorge, Donna M  
 Spangler-Timm, Tammy  
 Sproule, Jason L  
 Squirewell, Deborah J  
 Stackpoole, Michelle A  
 Strickland, Susan L  
 Sund, Peggy A  
 Sweeney, Colleen

Taddia, Kelly A  
 Tafelski, Julie J  
 Tanner, Lisa S  
 Taylor, Stephen C  
 Taylor, Terry E  
 Thrams, Wendy A  
 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  
 Wright, Pamela S  
 Yanka, Dale C  
 Yost, Kathleen M  
 Ziem, Donna  
 Zimmer, Claudia R





Livonia Public Schools Foundation  
15125 Farmington Rd. Livonia, MI 48154  
A 501(C)3 Organization  
December 2012  
[www.livoniapublicschools.org](http://www.livoniapublicschools.org)  
Printed by: Livonia Public Schools