



**LPS Education  
Foundation**

*Serving Livonia Public Schools*

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# **2012-13 Annual Report**

# Message from the President

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November, 2013

Dear Friends,

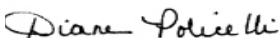
On behalf of the Board of Directors of the Livonia Public Schools Education Foundation, I would like to thank all of those who contributed their time or provided a donation to support our mission.

We had a fabulous year with so many proud accomplishments. Our many events were supported with enthusiasm by the community and have helped us raise funds for our major program, the Competitive Edge College Savings Plan. Completing its fifth year, it continues to grow in awareness and participation, and now includes nearly 1,000 students!

The Board of Directors have expanded their commitment to the Livonia Public Schools with a willingness to do more to help out in the classrooms right now. A grant program was developed and will be announced this fall. We are looking forward to providing resources to our students and teachers to enhance learning opportunities for all.

Again, on behalf of the Directors of the LPS Education 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 Education Foundation

## Board of Directors

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Diane Policelli  
President



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Vice President



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Lorna Durand



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Steve Sciatto



Judee Taormina



Kim Ward



Jill Wozniak

# History of the Livonia Public Schools Education 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 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.

## **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 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 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.

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 2012. What a hit! Over 2,000 friends and neighbors attended. A great time was had by all celebrating the return of school.

## Annual Luncheon

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Sheryl Connelly, Ford Motor Company Futurist, was the special guest speaker for the third annual fundraising luncheon, sponsored by the Livonia Public Schools Education Foundation. Hosted by WJMR Radio Sports Director Steve Courtney, over 200 community members heard Connelly challenge them to “Imagine a future that is unimaginable.”





# **LPS Education Foundation**

## **Financial Statement**

### **Fiscal Year July 1, 2012 - June 30, 2013**

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#### **Revenue/Gains**

Contributions	\$74,503
Interest Earned	1,098
Special Events (Net)	14,482

**Total Income** **\$90,083**

#### **Expenses**

Grants	\$27,668
Operating Expenses	4,724

**Total Expenses** **\$32,392**

#### **Restricted Assets**

Investments	\$163,580
Competitive Edge	98,443

#### **Liabilities**

Competitive Edge	\$98,443
Annual Expenses due LPS	4,785

**Net Assets** **\$496,144**



# **LIVONIA PUBLIC SCHOOLS EDUCATION FOUNDATION 2012-2013 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 \*

Michigan Education Savings Plan - TIAA-CREF \*

Roush Industries

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

Alpha Group

Bright House Networks

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

Cheryl Bowker Allstate Agency

Parkside Credit Union

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

## Corporate Donors – 2012-2013

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Alpha Group  
Bill Brown Ford  
Bright House Networks  
Cheryl Bowker Allstate Agency  
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  
    Cooper PTA  
    Grant Elementary PTA  
    Holmes Middle School PTSA  
    Hoover PTA  
    Perrinville PTA  
    Riley Upper Elementary PTA  
Livonia PTSA Council  
Michigan Educational Credit Union  
Michigan Education Savings Plan & TIAA-CREF  
Orthodontics Office of Dr. Randall Shaw, Dr. Nicole Jane and Dr. James Ginzler  
Parkside Credit Union  
Ralph Thayer Automotive  
Roush Industries  
Stevenson Booster Club  
St. Mary's Cultural and Banquet Center  
St. Mary Mercy Hospital of Livonia  
TRW Automotive  
Westland Shopping Center



# **Livonia Public Schools Employee Donors**

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Adams, Julie D	Dubel, Patricia	Lank, Kristina A
Alles, Sheila A	Dziedzic, Christina H	Lectka, Cindy J
Anderson, Andrea R	Eddy, Kelly J	Lee, Kellee N
Anderson, Karyn L	Ehlendt, Linda M	Lemieux, Roberta K
Anderson, Ronald J	Evans-Ebling, Valerie D	Licata, Susan E
Archibald, Steven P	Ewing, Barbara A	Liepa, Randy A
Ashworth, Carol A	Fedoronko, Gayle L	Macek, Theresa J
Belcher, Sharon M	Fedraw, Judy M	Macorkindale, Glenn S
Bentley, Matthew C	Foley, Julianne K	Maxwell, Kathy A
Bice, Jan P	Frame, Kathleen A	Mcconnell, Barbara K
Bickham, Janeane R	Gajor, Christine M	Mcdonald, Keith W
Buffington, Beth A	Garbutt, Annette M	Mcmuldroch, James
Bumpus, Terry A	Gentile, Rene	Medellin, Jennifer L
Burke, Denise M	Gibbons, James M	Miller, James D
Byrne, Doreen J	Gord, Christopher D	Miller, Marci L
Calkins, Carim R A	Guerriero, Michelle A	Miller, Shelly E
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Cannell, Lisa M	Hammye, Ronald D	Mitchell, David C
Carlini, Isolina D	Hedden, Cathlene M	Monasterski, Barbara D
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Cerny, Leslie W	Heinrich, Claudia T	Nathan, Michael C
Christenson, Laurie A	Hill, Deborah O	Nault, Colleen G
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Clay, Jennifer L	Hinze, Dennis A	Nersesian, Lori H
Coggins, Kathleen M	Horgan, Sean P	Noble, Catherine A
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Considine, James M	Janowski, Deborah A	O'brien, Theresa L
Cooke, Patricia A	Jary, Sarah J	Oppermann, Gretchen G
Coon, Sherrie A	Johnson, Debra L	Oquist, Andrea L
Daraskavich, Michael P	Jones, Barbara J	Orvis, Sarah J
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Decarli, Lynn S	Kalec, Ann W	Peterson, Kathryn F
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Schroth, Laura M  
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Seay, James W  
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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  
Taylor, Stephen C  
Taylor, Terry E  
Thrums, 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  
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Wischmeyer, Patricia J  
Yost, Kathleen M  
Ziem, Donna  
Zimmer, Claudia R



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Ken/Lucille Timmons  
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Martha Trafford  
Catherine Vanecek  
Candy Vaphiadis  
William Warren  
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Mary Wilkinson  
Joyce Yerks  
Mildred Youmans  
Albert/Ruth Zack  
Karen/Richard Zyczynski



## Individual Donors

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Mr. & Mrs. Kenneth Bourgon	In memory of Seymour Levine
Mr. & Mrs. Kenneth Bourgon	In memory of Donald Sedestrom
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Ms. Lorna Durand	
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Mr. Raymond C. Keeling	
Ms. Pat Kozlowski	
Mr. Eric Ladwig	
Mrs. Maxine Levine	In memory of your husband
Mr. Arvids Liepa	In memory of your wife
Dr. Randy Liepa	
Ms. Grace MacFarland	
Mr. Ernie Natalini	
Mr. and Mrs. James Policelli	
Ms. Teresa L. Pollock	
Mr. Christopher Rosemary	
Mrs. Lynda Scheel	
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Mrs. Roberta Sedestrom	In memory of your husband
Ms. Judee Taormina	
Ms. Kim Ward	
Ms. Marsha Weiss	
Mr. Jay Young	





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