



# 2016 - 2017 Annual Report



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## Message from the President

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December 2017

Dear Friends,

We are extremely grateful to the many donors and volunteers who so generously contribute to the LPS Education Foundation. Your enthusiastic commitment to the Foundation's mission shows you are proud to be a part of this important work. Thank you for all that you do!

The Foundation's all-volunteer Board of Directors is dedicated to continued growth and to bring new programs to enhance the educational needs of our students in the Livonia Public Schools school district.

The Foundation continues to flourish due to the support of the community and so many volunteers who are committed to its mission. This non-profit organization contributes to the successes of Livonia Public Schools students and staff by providing funds for classroom grants and the unique Competitive Edge College Savings Program that is offered to all LPS kindergarteners as a way to kick-start their college savings. The Foundation also supports literacy in elementary grades, through a tutoring program that helps strengthen students' literacy while making connections with caring adults in the community. All of this is only made possible due to the generosity from so many.

Sincerely,

*Diane Policelli*

Diane Policelli, President  
LPS Education Foundation



## Board of Directors



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## Our Mission

“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

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 2100 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 2016. 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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WDIV-TV anchor Devin Scillian was the special guest speaker for the 7th annual fundraising luncheon sponsored by the LPS Foundation. Some 240 community members gathered at the St. Mary Cultural Center in



Livonia to hear Scillian speak on the topic: "My journey from writer to author." Scillian shared the many important events and personalities he had covered as a journalist, but admitted his greatest love is writing children's books, of which he is the author of 16, including the national bestseller "A is for America." This year's luncheon raised over \$19,000 to support the Foundation's premier program, "The Competitive Edge College Savings Program."

## LPS Education Foundation appreciates Honorary Board members

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: Glenn Anderson, Ruth Ann Brown, Jim Cambridge, Steve Courtney, Chuck Dardas, Jack Engebretson, Jim Fausone, Dr. Conway Jeffress, Jack Kirksey, Terry Marecki, John McElroy, Kathleen McIntyre, John Rogin, Father George Shalhoub, Mark Shobe, David Spivey, Carol Strom, Marty Talty, Kit Tennyson, Janet Thompson, Dan West, Mayor William Wild, John Wilkerson, Brian Wolverton, and Mayor Dennis Wright.

## LPS Education Foundation awards grants to teachers for the 2016-2017 school year



Nineteen LPS staff members were awarded grants worth \$43,000.00 by the Foundation this year. The awards represented technology, books to support district and classroom initiatives, music educational opportunities, district climate goals, and curriculum. The grants will support students and staff from pre-school through 12th grade and Special Education programs. This is the fourth year of the Grant Program which has distributed \$138,760.00 to 64 staff members to date.

*Pictured: The LPS Education Foundation presents drafting teacher Dave Roeser with a grant for drafting equipment at Franklin High School.*

## Financial Statement Fiscal Year - July 1, 2016 - June 30, 2017

### Revenue/Gains

Contributions	\$ 84,847
Net Interest & Investment	55,363
Special Events (Net)	17,470

**Total Revenues/Gains \$ 157,680**

### Expenses

Grants	\$ 43,000
Investment Expenses	3,666
Management & General	5,890
Fundraising	12,252

**Total Expenses \$ 64,808**

**Increase in Assets \$ 92,872**

**Total Assets (End of the Year) \$835,622**



# LPS Education Foundation 2016-2017 Corporate Donors

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

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

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

Bill Brown Ford, Inc. \*  
Michigan Educational Credit Union \*  
Orthodontics Office of Dr. Randall Shaw & Dr. Nicole Jane

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

Alpha USA  
Livonia PTAs/PTSAs \*  
Masco Corporation

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

Cheryl Bowker Allstate Agency  
Bill and Rod's Appliance, Inc.  
Community Financial Credit Union  
Dunkin' Donuts  
Livonia AM Rotary  
Livonia Kiwanis Early Risers  
Parkside Credit Union  
Team Shostak Family Restaurants  
ZF TRW \*

(\* Indicates Founding Partners)



# Corporate Donors – 2016-2017

Alpha USA  
Bill Brown Ford, Inc  
Bill and Rod's Appliance, Inc.  
Cheryl Bowker Allstate Agency  
Community Financial Credit Union  
DFCU Financial  
Dunkin' Donuts  
Livonia AM Rotary Club  
Livonia Kiwanis Early Risers  
Livonia Public Schools Employees  
Livonia Public Schools PTAs and PTSAs  
    Buchanan Elementary PTA  
    Cass Elementary PTA  
    Grant Elementary PTA  
    Holmes Middle School PTA  
    Hoover Elementary PTA  
    Riley Upper Elementary PTA  
    Stevenson PTSA  
Masco Corporation  
Michigan Educational Credit Union  
Orthodontics Office of Dr. Randall Shaw & Dr. Nicole Jane  
Parkside Credit Union  
St. Mary Mercy Livonia  
Team Schostak Family Restaurants  
Westland Shopping Center  
ZF TRW

## Gifts in Kind

Special thanks to the following for In-Kind Gifts:  
French's Flowers and Gifts, Inc., Livonia Observer, Monarch Printing,  
Rock Out Entertainment, Roush Industries, and  
St. Mary's Cultural and Banquet Center.



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