



**LPS Education  
Foundation**

*Serving Livonia Public Schools*

# 2017-2018 Annual Report



# Message from the President

January 2019

Dear Friends,

Thank you very much to the many donors and volunteers who so generously contribute to the LPS Education Foundation. 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'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.

All of this is made possible due to the generosity of 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 postgraduate 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

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 to the Livonia Public Schools students.

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.



# Support continues for Competitive Edge College Savings Program

The annual fundraiser luncheon to support the LPS Education Foundation's Competitive Edge College Savings Program was again a huge success, drawing more than 230 supporters to the Nov. 8 event at St. Mary's Cultural and Banquet Center.

From business and education to faith and non-profits, it was a tremendous show of support, according to LPS Education Foundation President Diane Policelli.

"It is a tribute to our community and to the LPS Education Foundation that you have filled the room to show your support," said Policelli.

Luncheon chairman Jay Young said several people have commented that this is a "must attend" event, each year, because it serves as a major source of funding for the Foundation's Competitive Edge College Savings Program.

The Foundation offers a college savings trust account to each participating kindergarten student in LPS, with an initial deposit made by the Foundation and additional contributions being added by the Foundation, each year, as budgets allow. Once the student graduates from LPS, he or she can use the accumulated funds toward a college, trade or any other post-secondary program, anywhere in the nation.

Since the Competitive Edge program began in 2008, the Foundation has set up savings accounts for nearly 2,500 students and has donated almost \$350,000 to the students' accounts. For the current school year, the Foundation added 420 students to the program.

The eighth annual luncheon is the main fund-raising event for the program, and always features "outstanding" guest speakers, noted Young.



This year, Crain's Detroit Business editor and publisher Ron Fournier offered stories from his political reporting career and political insight into today's local and national landscape. The Detroit native is an award-winning and critically acclaimed political contributor to *The Atlantic*, who started his career in Arkansas, covering then-governor Bill Clinton, before moving to Washington DC to cover the politics and the presidency during the administrations of Clinton, George W. Bush and Barack Obama.



Each year, hometown favorite, Steve Courtney, WJR sports director, serves as host and emcee, offering a dose of humor to the event.

## 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.

# Competitive Edge College Savings Program

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 Savings Program offers families of LPS kindergarten students the opportunity to enroll in this free program and the Foundation will designate them as beneficiaries of the Foundation's educational savings account. The Foundation contributes seed money and those funds grow throughout the child's LPS educational career. Upon graduation from LPS, the funds may be used for any post-secondary education or skills training program. Currently over 2500 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.



# Grant program thriving in LPS

The LPS Education Foundation's grant program is in its fifth year, and has distributed 85 grants totaling \$183,000 to LPS classrooms, schools and departments. Each year, LPS teachers and non-instructional staff may apply for a Foundation grant to fund a special project, equipment or other needs that may be outside of the district's budget.

A grant committee reviews the applications and selects which requests will be funded. A group of grant committee members recently paid 24 staff members a surprise visit, with over-sized checks in hand.

"This is a wonderful gift from the Education Foundation that we are very proud of," said LPS Education Foundation President Diane Policelli. Grants are funded, in part, by staff donations, which are matched by the Foundation. A Champions program was established to ensure staff awareness and to help generate and maintain financial support for the program. Additional donations for the grant program are made by corporate and individual donors.

The Foundation also operates a literacy program, which provides one-on-one or small group literacy tutoring for elementary school students. The program enables retired LPS staff members the opportunity to continue to make a difference in students' lives.

For more information about the LPS Education Foundation, visit [www.lpsfoundation.org](http://www.lpsfoundation.org).



# Back to School Event

The LPS Education Foundation partnered with LPS to hold a Bounce Back to School celebration in August 2017. 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.

In addition to face painting, the Back-to-School event provided students with a wide variety of games and activities at Riley Upper Elementary School including large inflatable bounce houses, a petting farm, pony rides, and lots of food. This annual event, attended by hundreds of LPS students, is one of the major fund raisers for the “Competitive Edge,” the Foundation’s premiere college savings program.



## Gifts in Kind

Special thanks to the following for In-Kind Gifts:  
Corporate Electronic Stationery, Troy; French's Flowers and Gifts;  
Livonia Observer; Rock Out Entertainment; Roush Industries; and  
St. Mary's Cultural and Banquet Center.

# Funding Sources

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



## Financial Statement Fiscal Year - July 1, 2017 - June 30, 2018

### Revenue/Gains

Contributions	\$101,465
Net Interest & Investment	60,086
Special Events (Net)	22,906

**Total Revenues/Gains                      \$184,457**

### Expenses

Grants	\$46,000
Management & General	13,091
Fundraising	13,466

**Total Expenses                                \$72,557**

<b>Increase in Assets</b>	<b>\$111,900</b>
<b>Total Assets (End of the Year)</b>	<b>\$947,522</b>



# LPS Education Foundation

## 2017-2018 Corporate Donors

### **Valedictorians Circle (\$50,000 and Above)**

DFCU Financial \*

Livonia Public Schools Employees \*

St. Mary Mercy Livonia \*

### **Salutatorians Circle (\$10,000 - \$49,999)**

The Big Smile Orthodontics

Bill Brown Ford, Inc. \*

Masco Corporation

Michigan Educational Credit Union \*

### **Honors Circle**

**(\$5,000 - \$9,999)**

Alpha USA

Community Financial Credit Union

Livonia PTAs/PTSAs \*

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

Cheryl Bowker Allstate Agency

Livonia AM Rotary

Livonia Jaycees

Livonia Kiwanis Early Risers

Parkside Credit Union

Team Rehabilitation of Livonia

ZF TRW \*

(\*Founding Partners)



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The Big Smile Orthodontics

Bill Brown Ford, Inc

Cheryl Bowker Allstate Agency

Community Financial Credit Union

DFCU Financial

Livonia AM Rotary Club

Livonia Jaycees

Livonia Kiwanis Early Risers

Livonia Public Schools Employees

Livonia Public Schools PTAs and PTSAs

Buchanan Elementary PTA

Grant Elementary PTA

Riley Upper Elementary PTA

Stevenson High School Booster Club

Webster PTA

Masco Corporation

Michigan Educational Credit Union

Parkside Credit Union

St. Mary Mercy Livonia

Team Rehabilitation of Livonia

ZF TRW





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