

2018-2019 Annual Report



**LPS Education
Foundation**

Serving Livonia Public Schools

Message from the President

January 2020

Dear Friends,

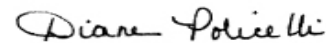
This year we celebrate the LPS Education Foundation's 15th year! Since its inception in 2004, the Foundation has been proud of the support it has been able to provide to the students, parents, and staff of Livonia Public Schools.

In 2008, the Foundation began its premiere program, The Competitive Edge College Savings program, as a way to educate parents on the benefits of starting to save early for post-secondary education for their children. In addition to that, the Foundation offers a college savings plan to each kindergarten student in the district and makes a financial contribution to each child to help pay for the cost of post-secondary education – whether it be trade school or college.

In addition, the Foundation began a grant program in 2013 with the goal to do something immediate to enhance teaching and learning in the district. This program has enabled the foundation to support every grade level and every school in the district.

On behalf of the Board of Directors of the Livonia Public Schools Education Foundation, I would like to thank all those who contributed their time or provided a donation to support the Foundation's mission. You truly are the key to our success and we greatly appreciate you!

Sincerely,



Diane Policelli, President
LPS Education Foundation



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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.

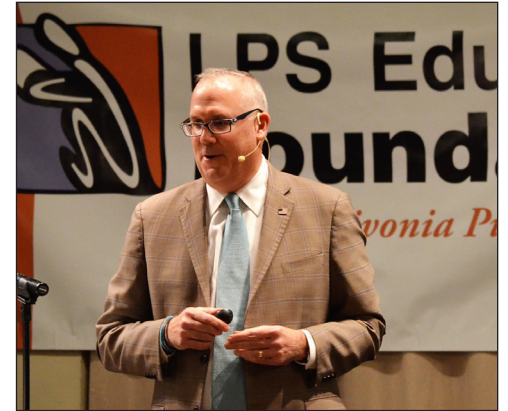
The Foundation offers a college savings trust account to each participating kindergarten student in LPS, with an initial deposit made by the Foundation and additional contributions being added by the Foundation each year, as budgets allow. Once the student graduates from LPS, he or she can use the accumulated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

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

Gifts in Kind

Special thanks to the following for In-Kind Gifts:
Corporate Electronic Stationery, Troy; French's Flowers and Gifts;
Livonia Observer; St. Mary's Cultural and Banquet Center; and,
LPS Printing Department.

This year's Keynote speaker was Edward J. Peper, Jr., who was named the US Vice President of General Motors Fleet in early 2012. In this position, he has overall responsibility for building relationships and growing sales with GM's largest customers who are in the fleet and commercial segments.



Peper started his career with General Motors in 1984 as a Cadillac District Sales Manager. From 2005 to 2009, he led GM's largest brand, Chevrolet. From August 2009 to 2011, Peper served as General Sales Manager for Cadillac.

Peper received his Bachelor's degree from Hillsdale College and also holds an MBA degree from the University of Chicago. Ed resides in Northville, Michigan with his wife Pam and two children, Emma and Hunter.

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 continues to thrive in LPS

The LPS Educational Foundation Grant Program is in its sixth year and has distributed 107 grants totaling \$214,000 to LPS staff, schools and departments. Each year staff is invited to apply for a Foundation grant. Their proposals demonstrate how the grant would support the district curriculum, the LPS Shared Vision & Collective Commitments, district climate goals and other focus areas. The Grant Program is able to fund a special project, equipment or other needs that may be outside the district's budget.

A committee composed of retired teachers and administrators reviews the applications and selects which proposals will be funded. During the 2018-19 school year, the committee made surprise visits to 17 staff members with over-sized checks in hand.

"This is a wonderful gift from the Foundation that we are very proud of," said LPS Foundation Board member Lorna Durand. Grants are funded by staff, individuals, community and corporate donations.

A district Champions Program was created to act as a liaison for the LPS Education Program with each building and/or department. Each Champion is to share information regarding the Foundation's activities such as the Grant Program, the Competitive Edge Program, the Back-to-School activity, the Foundation's Annual Luncheon and other activities. The Champions Program has helped to generate and maintain financial support for the Grant Program.



Back to School Event

The LPS Education Foundation partnered with LPS to hold a Bounce Back to School celebration in August 2018. 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.

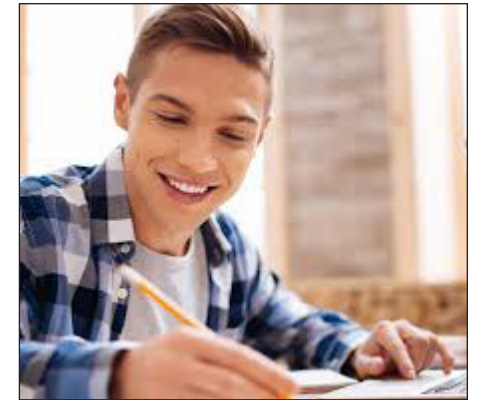
In addition to face painting, the Back-to-School event provided students with a wide variety of games and activities at Riley Upper Elementary School including large inflatable bounce houses, a petting farm, pony rides, and lots of food. This annual event, attended by hundreds of LPS students, is one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



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, 2018 - June 30, 2019

Revenue/Gains

Contributions	\$82,681
Net Interest & Investment	37,685
Special Events (Net)	10,572

Total Revenues/Gains \$130,938

Expenses

Grants	\$31,453
Management & General	10,424
Fundraising	547

Total Expenses \$42,424

Increase in Assets \$88,514

Total Assets (End of the Year) \$1,049,487

LPS Education Foundation 2018-2019 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

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

Cheryl Bowker Allstate Agency
Livonia Jaycees
Livonia Kiwanis Early Risers
Parkside Credit Union
ZF TRW *

(*Founding Partners)



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DFCU Financial
Feldman Chevrolet of Livonia
Livonia AM Rotary Club
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Livonia Kiwanis Early Risers
Livonia Public Schools Employees
Masco Corporation
Michigan Educational Credit Union
Parkside Credit Union
St. Mary Mercy Livonia
Stevenson High School Booster Club
ZF TRW



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