



**LIVONIA
PUBLIC
SCHOOLS
FOUNDATION**

2010-11 ANNUAL REPORT

MESSAGE FROM THE PRESIDENT

December 31, 2011

Dear Supporter of Public Education:

This last year was a great year for the Livonia Public Schools Foundation. Support from the community grew as the community enthusiastically supported the Foundation's college savings program - the Competitive Edge College Savings Program.

This fiscal year was the fourth year since initiating the Competitive Edge College Savings Program - a program under which the Foundation offers a college savings plan account to every kindergarten student in the district and makes a financial contribution on behalf each child to help pay for the cost of the child's college education.

While contributing financially to kindergartners, the primary purpose of the program is to educate parents about the value of college savings and to give them the opportunity to manage their own 529 college savings program.

I would like to thank all of those who made a contribution to the important work of the Foundation during the year. Your generosity helps make a difference in the lives of the children of our community.



Sincerely,

A handwritten signature in black ink, appearing to read "James R. Cambridge". The signature is stylized with large, flowing loops and a long horizontal stroke at the end.

James R. Cambridge
President
Livonia Public Schools Foundation

BOARD OF DIRECTORS



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Director



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member

HISTORY OF THE LIVONIA PUBLIC SCHOOLS FOUNDATION

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, which under Proposal A ties school funding to sales taxes, 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 were consulted. 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 By-Laws called for seven voting directors and up to three non-voting members initially appointed for a term of one to three years. 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 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

“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

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

LPS FOUNDATION 2010-2011 ACCOMPLISHMENTS

DESIGNATED FUNDS

BUSINESS/TEACHER CONNECTION

The Business/Teacher Connection program is a partnership between the Livonia Schools and the Livonia Chamber of Commerce. This program brings together business people and teachers in a unique collaboration. Business and teacher partners visit each other's workplace and learn about the application of curriculum in the work world. The Foundation supported the participation of seven teachers through a stipend made possible by a donation from TRW Automotive.

GIFT TO LPS SCHOOL BUILDINGS

The Foundation donated \$1,000 to each school building in LPS, for a total gift of \$26,000, to support school operations. These funds were used to supplement materials and supplies used in the schools.



COMPETITIVE EDGE COLLEGE SAVINGS PROGRAM

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.



LPS FOUNDATION FUNDRAISING STRATEGY

FUNDING STRATEGY

A. GENERAL FUNDS

The overriding strategy for fundraising and expenditures will be to approve and provide monies for programs, with funds raised in the preceding fiscal year. The exception to this policy will be the support of programs through specifically designated donations, those which are received and accepted by the LPS Foundation for the specific use of donor directed programs and projects which meet the mission and values of the Foundation.

A fundraising goal will be established for each fiscal year, which will be comprised of both designated and undesignated funds. The primary purpose of the undesignated donations will be to support major (high cost) programs consistent with the mission and values of the Foundation. Once that goal is achieved, additional funds received will be placed in an endowment account for use in succeeding years to support sponsor-generated requests.

B. COMPETITIVE EDGE

This program is an exciting new college savings program available for each kindergartner entering the Livonia Public Schools. The funding will be provided by both corporate and individual contributors, establishing a core of founding partners committed to a long-term pledge. The fundraising campaign began September 2007.



FUNDING SOURCES

Currently, donations have been received from the following sources:

- I. Individual Donors
 - a. Retirees
 - b. Employees
 - c. District Residents
 - d. Alumni
2. Corporate Sponsors
3. Back to School events with Camp Mirage
4. Honorary Donations
5. Annual Luncheon



FUTURE FUNDRAISING FOCUS

The Foundation will continue to focus specific fundraising efforts on our established target groups: alumni, businesses, community members, parents, retirees, and staff members, as well as sponsor events which will include all of these groups.

Campaigns that begin with individual letters requesting donations, strengthened in many cases by personal contacts, will be instituted for alumni, retirees, and staff members.

The following fundraising events, designed to involve all of our targeted groups, are being planned for the 2011-2012 school year. These include:

EMPLOYEE PAYROLL DEDUCTION CAMPAIGN

During two weeks in the fall of 2008, the Foundation launched a follow-up comprehensive campaign designed to encourage all LPS employees to contribute to the Foundation through the payroll deduction method. The primary focus of this campaign is to support the Competitive Edge program.

CORPORATE GIVING CAMPAIGN

Following the employee campaign, corporate citizens and suppliers of goods and services to the district will be invited to share their resources with the Foundation for the benefit of LPS students.

RETIREE GIVING CAMPAIGN

Development of an LPS retiree database.

ANNUAL LUNCHEON

At the beginning of the school year, a fundraising luncheon was held at the St. Mary Cultural Center with WJR sports director and Livonia resident Steve Courtney serving as Master of Ceremonies and keynote speaker. The event raised \$6,532 for the Foundation. In 2011, the keynote speaker will be David Brandon, Athletic Director at the University of Michigan.



BACK TO SCHOOL EVENT

The LPS Foundation partnered with LPS to hold a Bounce Back to School celebration in August 2010. What a hit! Over 2,000 friends and neighbors attended and more than \$7,735 was raised for the Foundation. A great time was had by all celebrating the return of school.

LPS FOUNDATION
FINANCIAL STATEMENT
FISCAL YEAR JULY 1, 2010 – JUNE 30, 2011

REVENUES/GAINS

| | |
|-------------------------------|-------------------|
| Contributions | \$ 85,677 |
| Interest Earned | 2,112 |
| Special Events | 21,714 |
| Unrealized loss on investment | 443 |
| Total Income | \$ 109,946 |

EXPENSES

| | |
|-----------------------|------------------|
| Special Events | \$ 4,436 |
| Grants | 26,350 |
| Operating Expenses | 1,885 |
| Total Expenses | \$ 32,671 |

ASSETS

| | |
|------------------------------|-------------------|
| Investments | \$ 49,635 |
| Custodial, held for students | 60,023 |
| Total Assets | \$ 412,970 |



CORPORATE DONORS

(*INDICATES FOUNDING PARTNERS)

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

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

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

- *Bill Brown Ford, Inc.
- *Livonia PTA/PTSA's
- *Michigan Educational Credit Union
- *MESPTIAA-CREF

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

- Alpha Group
- Bright House Networks
- *Kopmeyer & Talty, P.C.
- Northwood University

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

- Alpha Delta Kappa - Tau Chapter
- *Davenport University
- Dr. Randall Shaw, Dr. Nicole Jane, and Dr. James Ginzler Orthodontics
- *TRW Automotive

Gifts in Kind

Special thanks to the **Livonia Observer** for advertising our fund raising events in the newspaper as an in-kind contribution to the Foundation and to **Camp Mirage** for providing the equipment for the "Bounce Back to School" events held at our K-4 elementary schools each fall.

DONATIONS IN MEMORY OF

Mr. & Mrs. Christopher Schulte for Dick Aronson, Clayton Atwater,
Charles Lectka, and Alvin Martin
Mr. Arvids Liepa for Shirley Liepa



CORPORATE DONORS

Alpha Delta Kappa - Tau Chapter
Alpha Group
Bill Brown Ford, Inc.
Bright House Networks, LLC
Davenport University
DFCU Financial
Dr. Shaw, Dr. Jane, & Dr. Ginzler
Orthodontics
Kopmeyer and Talty, P.C.
Michigan Educational Credit Union
Michigan Educational Savings Program &
TIAA-CREF
Northwood University
St. Mary Mercy Livonia
TRW Automotive
Livonia PTSA Council
Coolidge Elementary PTA
Garfield Elementary PTA
Grant Elementary PTA
Holmes Middle School PTSA
Jackson Center PTA
Johnson Upper Elementary PTA
Riley Upper Elementary PTA
Roosevelt Elementary PTA
Stevenson High School PTSA
Webster Elementary PTA

INDIVIDUAL DONORS

James and Mary Cambridge
Donna Crosier
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John Hiltz
Raymond Keeling
June Kendall
Jack and Patricia Kirksey
Grace MacFarland
Judee Taormina
Susan Wagner
Margaret Fay Walter
Marsha Weiss
Jay Young

LIVONIA PUBLIC SCHOOLS EMPLOYEE DONORS

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

McMuldroch, James
Mcsorley, Kathy L
Medellin, Jennifer L
Miller, James D
Miller, Shelly E
Mitchell, Christine R
Mitchell, David C
Monasterski, Barbara D
Moore, Shellie
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
Phillips, Catherine S
Pilon, Mary
Pinta, Stephanie J
Polk, Jerry G
Posh, Heidi Bloom
Price, Christine M
Price, Kathleen E
Pritula, Michelle M
Robak, Cheryl A

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
Sieber, Tammy K
Siewicki, Carolyn
Simon, Leigh R
Sinning, Judith G
Skelton, Marylee A
Smith, Sherri L
Snabb, Marilyn P
Sorge, Donna M
Spangler-Timm, Tammy
Spellich, David L
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
Wells-Biggert, Kristie S
Wichmann, Corinne
Willenborg, Daniel R
Wischmeyer, Patricia J
Yanka, Dale C
Yost, Kathleen M
Ziem, Donna
Zimmer, Claudia R





**LIVONIA PUBLIC SCHOOLS FOUNDATION
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