



# *The Education Foundation of Lower Merion*

## *Annual Report*

### *Fiscal Year July 1, 2006-June 30, 2007*

## **EFLM Enjoys Success in Year One**

*By Richard Wells, EFLM President*

The beginning of the 2007 – 2008 school year marked not just a return to classes for thousands of students in Lower Merion School District, but also the beginning of a second year for the Education Foundation of Lower Merion (EFLM). As a supporter of the Foundation, you are important partner in our efforts to enhance and protect the educational excellence of our public schools. With the Foundation's first year completed, it is my pleasure to report on the steps we have taken to achieve our goals.

In its first year, the EFLM made considerable progress in building a foundation upon which to grow. Among our accomplishments, we:

- ◆ Wrote a strategic plan and established ourselves as a 501(c)(3) non-profit foundation;
- ◆ Sent our first fund-raising appeal letter to households with children in the Lower Merion School District;
- ◆ Hired a part-time coordinator;
- ◆ Created [www.educationfoundationoflm.org](http://www.educationfoundationoflm.org), a website that keeps the public informed, distributes grant application forms, and even accepts online donations;
- ◆ Established the EFLM's eligibility for the Pennsylvania Educational Improvement Tax Credit (EITC) program;
- ◆ Expanded our Board of Directors to include 31 members representing parents, business, community, teachers, and District administrators. Our directors bring a wide range of expertise in education, management, planning, communications, and fundraising;



*Sales of 2007 Lower Merion and Harriton High School graduation DVDs raised funds for the Education Foundation of Lower Merion.*

### **Fall-Winter 2007**

#### **Thank you to our Corporate Donors:**

- *Citibank (Lead Gala sponsor, 2007), \$10,000*
- *Bryn Mawr Hospital (Bronze Gala sponsor, 2007), \$1,000*
- *Foreman Construction Group (Bronze Gala Sponsor, 2007), \$1,000*
- *Lankenau Hospital (Bronze Gala sponsor, 2007), \$1,000*

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## Success in Year One (*continued*)

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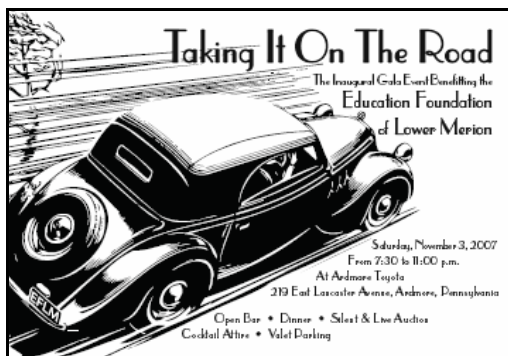
- ◆ Developed a logo that references the Foundation's commitment to the Lower Merion School District and all ten of its schools;
- ◆ Worked cooperatively with groups such as the Interschool Council and the Lower Merion Harriton Alumni Association;
- ◆ Sold DVDs of the Lower Merion and Harriton High Schools graduations, with proceeds benefiting the Foundation; and
- ◆ Began planning for the Foundation's first-ever gala, held on Saturday, November 3, 2007, at Ardmore Toyota in Ardmore.

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***“Clearly, the Education Foundation of Lower Merion has made great strides in its initial year.”***

Most important among the Foundation's accomplishments in its first year, however, was that we distributed \$9,000 in grants to eight projects benefiting students at the elementary-, middle-, and high-school levels. With funds provided by the EFLM:

- ◆ Two schools were able to purchase books to support diversity initiatives by enhancing materials about the life and work of Coretta Scott King;
- ◆ A middle school acquired low-cost headphones for sale in its student-run store. Not only does this make the headphones available for students to use in the school's technology lab, but it also provides inventory for the school store, which encourages learning about entrepreneurship;
- ◆ A middle school purchased DVDs to support its science curriculum;
- ◆ Supplementary reading materials were developed to support the well-known Maestro the Lion music-education program;



*In its first year, the EFLM and its volunteers began planning for its first annual fundraising Gala, held at Ardmore Toyota in November 2007.*

- ◆ A set of bell chimes was purchased for an elementary school that will enhance music education and performance for years to come; and
- ◆ The District's World Language Department has been able to move forward in developing an innovative program to enhance high-school French instruction for disadvantaged students.

The funding for these important programs would not have been possible without the many generous individuals and businesses that contributed to the EFLM in its first year. We are working hard in our second year to grow our fundraising, which in turn will allow the Foundation to support more programs at a greater level in the years ahead. Toward that

end, an appeal letter was mailed to every household in Lower Merion Township in June, and additional mailings were planned for the rest of 2007.

A committee of volunteers also worked on "Taking it on the Road," the first annual Foundation Gala, held on Saturday, November 3, 2007. We are grateful for the support of Ardmore Toyota, which allowed

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## Success in Year One *(continued)*

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us to use their facility for the Gala; for Citibank's many generous contributions as a lead Gala sponsor; and for the leadership of Bryn Mawr Hospital, Lankenau Hospital, and Foreman Construction Group as bronze sponsors in our Gala's first year.

Clearly, the Education Foundation of Lower Merion has made great strides in its initial year, thanks in large part to the financial support of our donors. Much work remains, however, if the Foundation is to meet the goals inherent in our mission statement: *to provide a vehicle for the community to voluntarily support programs and activities that will enhance the educational experience of all students.*

On behalf of the entire Board of Directors of the EFLM—and on behalf of our public-school students, who are the ultimate beneficiaries of your generosity—I want to thank you for your support in our first year, and I hope you will continue to be a champion of the outstanding public education system in Lower Merion that benefits our children and the entire community.



*(L-R): EFLM Board member Grace Foltz, President Richard Wells, Coordinator Sherry Wert, and Board member Maureen Austin at a planning meeting for the 2007 Gala fundraiser*

## Pennsylvania EITC Program Q&A

In 2006, the Education Foundation of Lower Merion became eligible to receive Educational Improvement Tax Credit (EITC) contributions, tax credits for businesses that make a donation to help implement state-approved programs not supported by the school district budget. The EITC program is a win-win for businesses and the community. Through this program, a business is able to direct its business tax dollars in a significant way while creating goodwill in the community, supporting the education of its customers' and employees' children, and training its future labor force.

***“The EITC program is a win-win for businesses and the community.”***

### ***What businesses qualify for the EITC program?***

Businesses authorized to do business in Pennsylvania who are subject to the Corporate Net Income Tax, the Capital Stock Franchise Tax, the Bank and Trust Company Shares Tax, the Title Insurance Companies Shares Tax, the Insurance Premiums Tax, and/or the Mutual Thrift Institution Tax can participate.

### ***How much of a tax credit can I get for my business?***

A business can receive a credit against taxes owed of 75% of its donation; if a company makes a two-year commitment of equal funding under the program, the credit rises to 90% of its donation. Eligible companies may take up to \$200,000 in tax credits per year.

### ***Can a business contribute to more than one organization?***

Businesses can donate to as many eligible organizations as they choose.

### ***How can my business make an EITC contribution?***

Businesses must apply to the PA Department of Community and Economic Development (DCED). Applications are due in Harrisburg on July 1 of each year, and are awarded on a first-come, first-served basis until the state funds are depleted. The application is a single page and requires just a few minutes to complete. For more information, see the DCED website, [www.newpa.com](http://www.newpa.com), or contact the DCED directly at 717-787-7120.

## Foundation's Board of Directors in Place for 2007-2008

At its June 2007 annual meeting, the Education Foundation elected its Board of Directors to one-, two-, and three-year terms; following this year, members of the Board will be elected to two-year terms. In addition to its elected members, the EFLM Board includes representatives from the Lower Merion Education Association (LMEA), Interschool Council (ISC), school administration, the Board of School Directors, and the Lower Merion Harriton Alumni Association. It also includes the LMSD Superintendent of Schools and Director of Community Relations, who serve by virtue of their office. The 2007-2008 EFLM Directors are:

Mrs. Maureen F. Austin	Jamie P. Savedoff, Ph.D.
Robert L. Benz, M.D.	Philip D. Selim, Ph.D.
Marie Uberti-Benz, M.D.	Mr. Adam T. Sherman
Mr. Marc A. Q. Broderick	Mrs. Anne L. Siembieda
S. David Fineman, Esquire	Mrs. Danita Simon
Grace Smith Foltz, Esquire	Mrs. Gail Singer
Mr. Gary J. Friedlander	Mr. Brad Sinrod
Ms. Jackie Gaines	Mrs. Deborah A. Sokil, <i>Secretary</i>
Mr. Bruce J. Goldstein	Mr. Guy E. Stewart, III
Anthony P. Green, Ph.D.	Mr. Lee E. Tabas
Mr. Paul Halpern	Ms. Judy Vietri
Alan C. Kessler, Esquire	Mr. Michael M. Weisbrot, <i>Treasurer</i>
William L. Landsburg, Esquire	Mr. Richard Wells, <i>President</i>
Mrs. Bunny Levyn	Mr. John Wert, Jr.
Jeffrey M. Lindy, Esquire	Mr. Douglas B. Young
Ms. Abby Phillipson	
Mrs. Eileen B. Riddell, <i>Vice President</i>	Mrs. Sherry Wert, <i>Coordinator</i>

## EFLM: A Foundation for the Future



*The 2007 Lower Merion High School graduates celebrate their achievement. The EFLM wants to ensure that graduating classes 20 years from now will receive the same high-quality education that this year's class did.*

Historically, Lower Merion School District has been able to support a range of programs that have kept its six elementary schools, two middle schools, and two high schools at the forefront of public education. In 2006, however, Pennsylvania legislators enacted property tax legislation that sets a limit, tied to inflation, on how much school budgets can increase each year, which will potentially constrict the district's ability to maintain its range of offerings for students while implementing new and innovative programs.

The Education Foundation allows businesses, alumni, and community members to help ensure that Lower Merion schools will continue to be among the best in the country in the decades to come. You can support the Foundation by participating in the Pennsylvania EITC program or your employer's Matching Gifts program; by honoring a teacher, a family member, or a friend with a gift; by recognizing a graduation, a reunion, or a bar/bat mitzvah; or simply by making an annual donation. All gifts to the Education Foundation are tax-deductible.

friend with a gift; by recognizing a graduation, a reunion, or a bar/bat mitzvah; or simply by making an annual donation. All gifts to the Education Foundation are tax-deductible.

To make a donation, send a check to EFLM, P.O. Box 79, Narberth PA 19072; or go to the Foundation's website at [www.educationfoundationoflm.org](http://www.educationfoundationoflm.org), and click on "Donations."

## Contributors, Fiscal Year 2006-2007

(Through June 30, 2007)

The Education Foundation of Lower Merion accepted over \$15,000 in donations in its first year. Initial donations came primarily from contributions by the EFLM Board of Directors and from an appeal sent to parents of all Lower Merion School District students in November 2006.

Thanks to these contributions, the EFLM was able to award \$9,000 in grants to school programs in June 2007. These donations also funded further successful fundraising efforts in 2007-2008, such as a mailing to all residents of Lower Merion Township and Narberth Borough, and it provided seed money for the first annual Education Foundation Gala fundraiser in November 2007.

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*“Early support for the new Education Foundation of Lower Merion has been heartening.”*

Early support for the new Education Foundation of Lower Merion has been heartening. It underscores how much the Lower Merion community values the education of its children. The contributors listed below are those who donated to the Foundation through June 30, 2007.

### **Partner (\$1,000 and over)**

Dr. Robert and Dr. Marie Benz  
Harriette and Charles L. Tabas Foundation  
Mr. Paul Halpern  
Mr. and Mrs. Buck Scott  
Mr. and Mrs. Lee Tabas

### **Benefactor (\$500-\$999)**

Mr. and Mrs. David Fineman  
Nancy Librett  
Yatsun Wen

### **Patron (\$250-\$499)**

Mr. and Mrs. Albert Austin  
Jane Dellheim  
Ellen Kurtzman  
Mr. and Mrs. Michael Weisbrot  
Mr. and Mrs. John Wert, Jr.  
Mr. Doug Young

### **Sustainer (\$100-\$249)**

Beth Burrell  
Mr. James Caplan  
Dr. Murali V. Chelikani  
Mr. and Mrs. Andrew Derrow  
Dr. Howard J. Eisen  
Mr. Robert M. Elwood  
Frederick Fischer and Anne M. Greenhalgh  
Mr. and Mrs. Daniel Foltz  
Mr. and Mrs. Gary Friedlander

Mr. Michael Greenblatt  
Mrs. Dorothy Kowey  
Mr. and Mrs. William Landsburg  
Mary F. Morrison  
Mr. Richard Myers  
Ms. Abby Phillipson  
Dr. Steven and Dr. Marcie Portman  
Mrs. Eileen Riddell  
Dr. Jamie Savedoff  
Mr. and Mrs. Matthew Siembieda  
Mrs. Gail Singer  
Mrs. Debbie Sokil  
Judy Vietri  
Mr. and Mrs. Michael Wax  
Mr. and Mrs. Richard Wells  
Mrs. Barbara J. Wolf

### **Supporter (to \$99)**

Mrs. Debra Erdman  
Richard O. Johnson  
Mei Chen Liao  
Dr. Leslie Poul Melman  
Mr. and Mrs. Jerry Novick  
Mr. and Mrs. Tim Shapiro  
Ms. Stephanie Shell  
Gerald F. Skillings

### **In Memory of Noel Coyne**

Jorge Rawicz and Cathy Band



## The Education Foundation of Lower Merion

BALA CYNWYD • BELMONT HILLS • CYNWYD • GLADWYNE • HARRITON  
LOWER MERION • MERION • PENN VALLEY • PENN WYNNE • WELSH VALLEY

P.O. Box 79  
Narberth, PA 19072

Website: [www.educationfoundationoflm.org](http://www.educationfoundationoflm.org)  
Email: [info@educationfoundationoflm.org](mailto:info@educationfoundationoflm.org)

*A Foundation for the Future*

## About the Education Foundation of Lower Merion

The Education Foundation of Lower Merion (EFLM) is a 501(c)(3) charitable organization established in 2006 to which tax-deductible contributions can be made. Its aim is to provide a vehicle for voluntary support of programs and activities to enhance the educational experience of all students in the Lower Merion School District. It is independent of the school district, but is intended to support the district's educational goals.

Foundation funds are not used to replace tax dollars for basics such as core programs or textbooks; instead, they are intended to encourage innovation in teaching, enhance the educational programs, and provide an avenue for alumni and other supporters to contribute to the capital program.

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***“The mission of the Education Foundation of Lower Merion is to provide a vehicle for the entire community’s voluntary support of programs and activities enhancing the educational experience of all students, consistent with the mission of the Lower Merion School District.”***

The Foundation intends to provide the financial flexibility needed to ensure that Lower Merion's schools continue to thrive. It also aims to strengthen alumni and community pride, and to develop meaningful relationships with other organizations, including businesses and cultural institutions.

Further information about the EFLM can be found at [www.educationfoundationoflm.org](http://www.educationfoundationoflm.org), or e-mail us at [info@educationfoundationoflm.org](mailto:info@educationfoundationoflm.org).