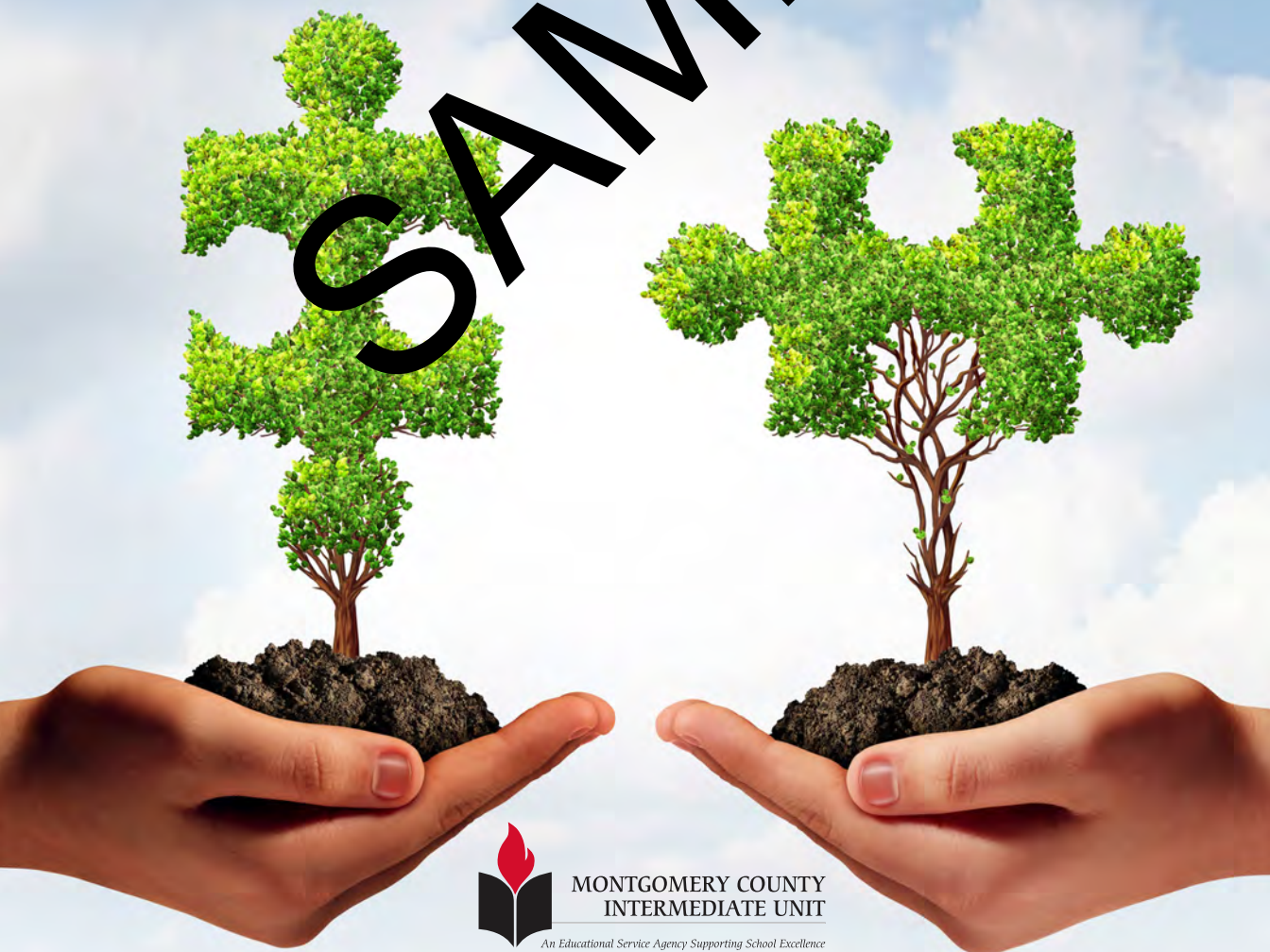


# SHAPING OUR FUTURE TOGETHER

2013-2014 MCIU Annual Report to Our Partners

SAMPLE



MONTGOMERY COUNTY  
INTERMEDIATE UNIT

*An Educational Service Agency Supporting School Excellence*

# S H A P E

*verb*

gerund or present participle: **shaping**

- determine the nature of; have a great influence on.  
*synonyms:* determine, form, fashion, mold, define, develop, influence, affect
- develop in a particular way; progress  
*synonyms:* improve, get better, progress, show promise, develop
- To plan to bring about the realization or accomplishment of; to direct the course of...



These various definitions of the word “shaping” truly exemplify the goals and accomplishments of the Montgomery County Intermediate Unit

(MCIU) during the 2013-2014 school year.

Faced with economic challenges, shifts in the marketplace and the ever changing needs of serving our schools, teachers, students and families, the MCIU embarked on a journey to reinforce and reinvigorate its mission of providing cost-effective, results oriented education services. This necessitated a close examination of our leadership and staffing, strategic intent, programs and practices to ensure we are doing everything we can to be responsive and innovative in delivering effective service solutions, cutting costs and providing outstanding customer service.

Much of this hard work was completed during the 2013-2014 school year, paving the way for our organization to strengthen its value as an educational partner and shape our future success. This included:

- changes in leadership and staffing, including the recruitment of a new executive director and the difficult decision of reducing our workforce
- modifications in services, the elimination of certain programs, expansion of others and introduction of new services
- revisions in our agency and divisional goals to align with recommendations that came out of a communications audit and strategic rebranding initiative
- ongoing efforts to relocate to a new facility in 2015 that will expand our ability to serve our clients and enhance their experience at the MCIU

Making these changes required our staff to be flexible and progressive in their thinking, stepping outside of their comfort zone to adapt to different ways of delivering programs and services. Collectively, we recognized the need to innovate and we embraced the responsibility to redirect the course of the intermediate unit.

Throughout this journey, I was honored to serve in leadership at the MCIU — first as the Assistant Executive Director and then Acting Executive Director. I am proud of our staff and the steps we have taken to bring about the realization of our goals.

On pages 3-5 of this annual report, we have provided more information about the major initiatives that are underway to add focus and direction to help the MCIU become an even better organization. We anticipate these initiatives will reinvigorate our culture in a positive manner to become one of the leading regional service agencies in the state.

Additionally, on pages 6-13, we have highlighted some of our shared success in supporting our students, educators and community over the past year. We are deeply grateful to have school leaders, teachers, parents and community partners so actively engaged in our organization’s success and the success of our students.

We truly value your partnership in shaping our future and look forward to serving our schools and students in the 2014-2015 school year.

Dr. Bradley C. Landis  
*Acting Executive Director*

## LETTER FROM THE BOARD PRESIDENT



Serving on the MCIU Board of Directors for the past six years, including the past three years as board president, has given me unique insight into the mission of the

organization and its essential role as an educational partner to our school districts and nonpublic schools.

Working closely with the administrative team at the MCIU, I have learned about the tremendous breadth of programs and services offered to support the educational community.

I have witnessed the positive impact of those programs and services on the students, families and educators of Montgomery County.

I have seen children learning new things from MCIU staff that will help them to be successful in school and in their future careers.

I have spoken to educators who have obtained new classroom strategies and methods of teaching through the MCIU that will sharpen instruction and improve student achievement.

And, I have seen the positive results of so many other MCIU programs and services — hybrid learning, cooperative purchasing, and the popular scholastic student competitions just to name a few.

But, perhaps most impressive of all, during the 2013-2014 school year I saw the tremendous dedication of the staff in transitioning the MCIU to become an even stronger organization. The MCIU tackled many difficult issues and embraced necessary change to shape a better future.

We are greatly appreciative of the active involvement of the MCIU staff and the participation and guidance of

the school community during a major time of transition. With the support of our key stakeholders, the Board of Directors was able to identify and appoint new leadership, complete a thorough communications audit and rebranding initiative and begin addressing operational issues to strengthen the organization's ability to deliver responsive, cost-effective, results-oriented services. In March 2014, the community also joined us to celebrate the renovation kickoff at the MCIU's new administrative offices and conference center. As we move closer to its completion, it is clear how much the facility will enhance the work of the MCIU and benefit the entire community.

On behalf of the Board of Directors, thank you to all of our partners for your support. Working together, we anticipate many more successes for our schools and students in the 2014-2015 school year.

Linda Prince-Jones  
*Board President*



# ENGAGING OUR PARTNERS: MAJOR INITIATIVES

## New Facility Focused on Needs of Students, Educators and the Community

A state of the art conference and training center to accommodate conferences and meetings of all sizes...

a professional office environment with updated facilities for enhanced service delivery to the schools of Montgomery County and the special needs population the MCIU serves...

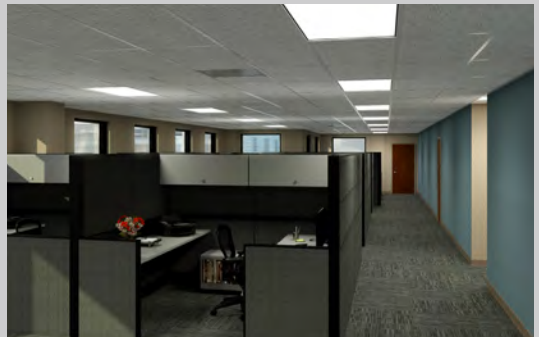
flexible office space that enhances client interaction and segregates the public functions of the organization from internal functions...

easy access for all Montgomery County schools and secure, adequate parking for the thousands of annual MCIU visitors.

These are among the many amenities our families, schools and business community can anticipate with the opening of the

MCIU's new administrative offices and conference/training center located at 2 West Lafayette Street, Norristown. During the 2013-2014 school year, the MCIU finalized the building plans and began renovations. The redesign prioritizes elements that provide an enhanced customer service experience and service delivery to all constituents we serve.

In March 2014, our many partners joined the MCIU staff and Board of Directors to celebrate during a Renovation Kickoff Ceremony. Thanks and appreciation are extended to our school district superintendents and board of directors, Norristown borough officials and law enforcement and the Montgomery County officials and business community who have worked hand in hand with the MCIU to ensure the future success of our organization.



Rendering of lobby area in new building (top), a conference room (left) and typical office space (right).

# TO SHAPE OUR FUTURE SUCCESS



*Celebrating at the Renovation Kickoff reception left to right: County Treasurer Jason Salus, Montgomery County Commissioner Leslie Richards, MCIU Board President Burunda Prince-Jones, Board Secretary Maura Buri, Board Past President Joe Chmielewski, former Board Member James Burt, Former Board President Marc Lieberson, and County Commissioner Joseph Spiro.*



*Former MCIU Executive Director Dr. Dennis Harken, Dr. Charles Amuso, MCIU Management Services Director/CFO Stan Wisler and Assistant to the Executive Director Mary Dougherty.*

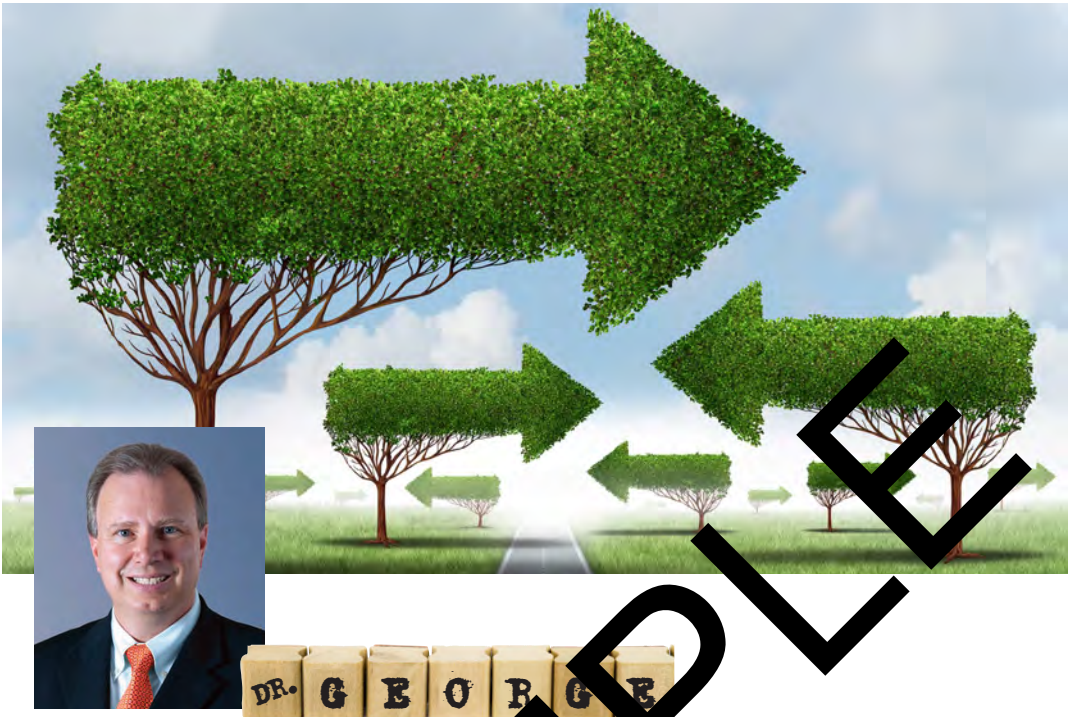
SAMPLE



## Other New Facility Features to Serve Our Community

- Expanded quantity, diversity and quality of professional development programs using the latest technologies
- A learning and meeting environment equipped with cutting-edge audio-visual equipment, comfortable seating and sufficient space for break-out sessions and food/beverages
- Flexible building space that accommodates audiences as large as 325 people and expands distance learning opportunities
- More adequate observation room space to evaluate the children who are referred to the MCIU for early intervention and speech/hearing/psychology evaluations
- Enhanced work and training space for the MCIU Transition Program
- A more private, professional setting for parents to discuss appropriate services with MCIU staff to ensure their child's success

## EXECUTIVE DIRECTOR SEARCH



At the end of the 2013-2014 school year, the MCIU Board of Directors retained a national search firm to conduct an executive director search to replace Dr. Jerry W. Shiveley who retired June 30, 2014. Our internal and external community was an essential partner in this process, providing input on the qualifications and qualities needed to effectively lead the MCIU in its future endeavors.

After taking all stakeholder input into consideration, the Board of Directors approved Dr. John J. George for the

position on September 17. The MCIU was very pleased to have Dr. George join the MCIU effective October 20, 2014.

***“Having served as both an intermediate unit executive director and a school district superintendent, Dr. George will bring a unique combination of leadership and demonstrated ability to provide strategic vision for an organization, lead and mentor superintendents and engage state and national educational political stakeholders.”***

*Lou Polaneczky, MCIU Board President (2014-15)*

## MCIU POSITION AND PRICING STUDY

In the fall of 2013, the MCIU coordinated an organization-wide position study to look at salaries and job responsibilities to align the MCIU’s future cost structure with the competitive marketplace and ensure our ability to provide cost-effective programs and services to the schools we serve. Over the course of the next year, the MCIU will incorporate recommendations from the study to reduce expenses.

We will also engage in a strategic analysis of pricing our products to determine better methods of delivering effective, affordable quality services while sustaining the organization’s financial health.



## PARTNERSHIPS THAT SHAPE OUR FUTURE HIGHLIGHTS OF OUR SHARED SUCCESS

### Working Together We Help Shape a Brighter Future for Students and Families

To most effectively serve students in Montgomery County, the MCIU prioritizes quality customer service, communication and collaboration with teachers, school staff, families and other providers. Shared successes this year include the following:

- Supported 109 students in need of academic, and emotional support through the Anderson School. A therapeutic support structure was integrated into the programming this year at the request of school districts.



Anderson School student Tyron Stanley received the first Dr. R. Thomas Marrone Resiliency Award



***“Without my daughter’s therapists from the time she was four months old to the present when she’s 3 ½, she would NEVER have made the progress she made and my husband and I would not know how to support her in any way that we do without the benefit of the therapists that have been in our lives. They have really become a part of our family and we deeply appreciate the work that they do.”***

*Parent of an Early Intervention Student*



Transition Teacher Maureen Morell works with a student at McNeil Consumer Products

- Organized the first Parent Panel for the Early Intervention program called “Engaging Families through Quality Customer Service.” Three parents of Early Intervention students, who each took turns sharing their family’s story, were enthusiastic about the opportunity to work hand in hand with staff, discussing service areas that work well and making recommendations for enhancements in the intake, evaluation, and service delivery process.
- Expanded the services of the MCIU BrainSTEPS team, providing support to 98 students from 20 public and nonpublic schools who suffered a brain injury — the largest number of referrals to a BrainSTEPS team in the state. The team partners with hospitals, agencies, schools and families to ensure students’ successful re-entry to school following an injury.
- Celebrated a 17-year relationship with McNeil Consumer Products of Fort Washington which provides work training opportunities for Montgomery County students. The partnership began with one student working in their cafeteria and now supports five students with work experiences throughout various departments each afternoon, including the cafeteria, company store, mailroom and fitness center.



*Preschool classroom for children with complex support needs*

- Served 183 school-age students in classroom programs and provided 973 days of consultative services to support teachers in providing quality instruction to students with disabilities
- Increased the capacity of the Explorations Partial Hospitalization Program from 20 to 25 due to the significant waiting list beginning in March 2014. Music therapy and art therapy was also added to the program in the 2013-2014 school year.
- The Training and Consulting (TaC) staff organized the first Parent Engagement Speakers Series, providing 15 different presentations. Topics included secondary transition, autism/math/reading homework strategies, financial planning and using technology to support students.
- Opened a new special education classroom to serve preschool aged children with complex support needs in September 2013. The program was so successful that the classroom quickly filled to capacity. The MCIU opened a second classroom in February 2014 to meet the needs of additional children in Montgomery County and now provides services to 16 children.

***“I am excited that we were given the opportunity to open a second classroom. Over the past year, I’ve witnessed the program enrich the lives of these children at such a critical time in their development. It is amazing to watch our students meet and exceed their goals as the year progresses.”***

*MCIU Early Intervention teacher Patricia Bradley*

### **Student Services By the #s**

*Program*

*Number of Students Served Countywide*

Early Intervention Students Served	2,589
School Age Special Education Classrooms	183
Itinerant Programs (speech, vision, hearing, orientation, mobility and vision)	662
Anderson School	109
Evaluation Services	130
Montgomery County Youth Detention Center Students	275
Transition Programs (individual, group and classroom)	417
Nonpublic School Services (individual, group and classroom services, including remedial math/reading, counseling, psychological services, & speech)	18,946
Nonpublic School Summer Camps	255



## A CELEBRATION OF READING AND ACADEMIC EXCELLENCE! SCHOLASTIC STUDENT COMPETITIONS

- Working with 20 school districts and 39 nonpublic schools, the MCIU celebrated the 15th annual Reading Olympics attracting 7,000 students on 506 teams. To help kick off the special occasion, local author Jerry Spinelli recorded a congratulatory audio message aired before each of the 9 competitions.
- Students from 9 school districts and the nonpublic school Mater Dei Catholic competed in the annual Pennsylvania High School and Middle School Computer Fair organized by the MCIU. Students from six districts and one nonpublic school were selected to advance to the state competition.
- Fourteen teams competed in the regional Academic Competition with Souderton Area High School advancing to the state competition.



Top photo: Students from St. Hillary School enjoy the 15th Annual Reading Olympics  
Left: Souderton Area High School celebrates their victory at the Academic Competition  
Right: Sandy Run Middle School students won in the category of animation at the Regional Computer Fair

## WORKING TOGETHER WE SUPPORT TEACHERS, STAFF AND SCHOOL LEADERS

To help shape the success of our school leaders, teachers and other staff, the MCIU provides a wide variety of programs, services and events, including:

- The annual Legislative Breakfast and organization of meetings between school leaders and state and federal legislators to discuss education issues and the impact of legislation on our schools
- The annual Montgomery County Diversity Recruitment Fair attended by 450 job seekers who had the opportunity to meet with more than 40 representatives from 18 Montgomery County school districts
- The 7th Annual Voices of Inspiration for Teaching Excellence hosted in partnership with Freedom Credit Union to provide much deserved recognition to teachers from the 21 school districts, the MCIU and a nonpublic school
- Technology services for schools including 1,067 hours of Technical Support Services to districts and nonpublic schools and PowerSchool support to 4 districts.



*L to R: Rep. Steve McCarter, PSBA Member Relations Coordinator East Zachary Peltz, MCIU Legislative Services Director Tina Viletto, Secretary Stewart Greenleaf, PSBA regional director Mark Miller, Cheltenham Superintendent Dr. Natalie Thomas*



*2014 Voices of Inspiration Finalists from left to right: Top Row, from left: John Williamson, Upper Perkiomen School District; Daniel Ortiz, Upper Dublin School District; Pamela Merenda, Hatboro-Horsham School District; John Grande, Upper Moreland School District; Anita Morgan, Methacton School District; Rebecca Brenner, Lower Merion School District; Lisa Furness, Colonial School District; Matthew Montagna, Souderton Area School District; Thomas Di Giulio, School District of Cheltenham; Todd Kelly, Pottsgrove School District; Holly Parkhouse Smith, Spring-Ford School District*

*Bottom row, from left: Jaime Maffei, Norristown Area School District; Dianne Krause, Wissahickon School District; Sharon Ferrebee, Perkiomen Valley School District; Joan Schwarz, Queen of Angels Regional Catholic School; Matthew Klenk, North Penn School District; Kristen Sharer, School District of Springfield Township; Carol Ganther Lusigne, Lower Moreland Township School District; Joanne Riehl, Montgomery County Intermediate Unit; Tamara Craven, School District of Jenkintown; Ellen Strange, Abington School District; Laura Ebersole, Upper Merion Area School District  
Not pictured: Helen Bowers, Pottstown School District*



*PVAAS Training for administrators*

## SHAPING TEACHING AND LEARNING

### When teachers learn, students learn.

Successful adoption of the PA Core Standards and other learning initiatives as well as many evaluation systems and other reforms depends on the capacity of educators to implement them. Meeting high expectations means educators must refine their instructional practices, adapt learning for students with different learning needs, redesign curriculum, and acquire strategies for assessing students.

A primary objective of the MCIU is to support teachers and administrators in planning, implementing and evaluating the integration of these initiatives through a variety of professional development offerings and sustained support for their learning.



*60 administrators attended Principal Effectiveness Workshops*

*State Initiative Training Workshops Offered at the MCIU (2013-2014)*

*# of Attendees Countywide*

Educator Effectiveness for Educational Specialists, Licensed Professionals and Non-Teaching Professionals Training	36
Principal Effectiveness	60
PA Student Learning Objectives	145
PVAAS	257
Data Governance	326
PA Core Standards	111



The MCIU's extensive professional development offerings are designed to be responsive to the teaching and learning needs of teachers, administrators and others in the school community.

In addition to the more than 350 workshops held at the MCIU, the staff provided customized training, consultation, coaching and technical assistance to address specific instructional needs in the districts. These offerings were provided on site to work hand in hand with administrators, teachers and instructional support staff.

Other shared accomplishments in 2013-2014 included the following:

- Provided 73 Continuing Professional Education (CPE) courses and more than 350 professional development workshops in the areas of curriculum and instruction, special education, technology, and communications
- Facilitated 25 different job alike groups and curriculum councils to provide peers from all districts with a forum to discuss common challenges and support each other through collaboration and information/resource sharing

- Partnered with Colonial, Lower Moreland Township, Lower Merion, and Wissahickon School districts to host a day-long symposium in March 2014 that focused on recent technology pilots, implementations and instructional best practices. More than 85 administrators and teachers from 15 Montgomery County school districts participated in the event, discussing hot topics such as Bring Your Own Device (BYOD) initiatives and 1:1 Computing.
- Supported school districts with the achievement of analyzing and using high-quality data sources to drive improvement in classroom practice, district policies and teacher preparation programs through regular Data Quality Network meetings and data trainings



***“Educational leaders enhance their understanding and improve outcomes when they have the chance to talk about their practice with others who are facing similar challenges.”***

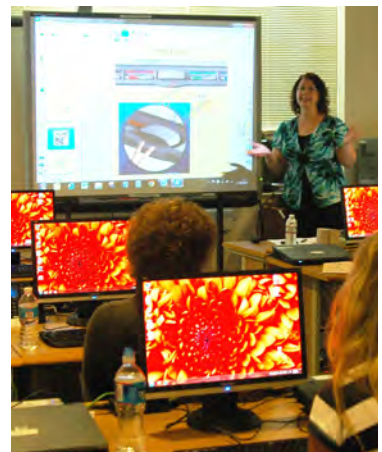
*Donna Gaffney, Director of Curriculum, Instruction and Professional Development*



*AP Chemistry Summer Institute*



*Training and Consultant Specialist Sarah Misner reviews questions from teachers at PA Core Standards workshop.*



*Technology Support Specialist Anne Draus teaches Simply Smart Board*

## PROFESSIONAL DEVELOPMENT BY THE NUMBERS

Professional Development Type	Number of Offerings	Number of Attendees
Continuing Professional Education (CPE)	73	713
Professional Development Workshops (at the MCIU)	373	5,508
Advanced Placement Summer Institutes	5	62
Technology Specific Workshops	49	399
New Teacher Induction/Seminar Series	8	120
Training and Consulting Workshops	88	1,241



Participants in the Carnegie Math training

**"I have taken quite a few courses through the MCIU in many different content areas and always have found the classes to be very satisfying and engaging. The knowledge I walk away with is very applicable to my classroom almost immediately."**

Carnegie Math training, Greg Roberts  
6th Grade Teacher, AM Kulp Elementary, North Penn School District

**"This workshop prompted me to think about how inclusion is done in my school and what I can change as a special education teacher to help better support my students."**

Teacher from West Chester Elementary who participated in the New Teacher Seminar Series- Supporting Students with Disabilities in the General Education Classroom

**"Using the information from the class, I will be able to focus my students in a different direction to help them gain the skills needed to pass the new exam."**

Participant in the Advanced Placement US History Summer Institute

**"I'm excited to implement this program using all the new strategies and tools. It is always a little scary trying something new but this program did a wonderful job of giving the teacher everything they need to succeed, including online support."**

Participant in a Wilson Foundations workshop



A two-day Gifted Boot Camp provided support for teachers and supervisors of gifted education.

## SHAPING THE BUDGET — WORKING TOGETHER WE DEVELOP SCHOOL EFFICIENCIES AND SAVINGS

The MCIU continued its role of achieving regional economies of scale by expanding successful countywide leveraging of savings and efficiencies for schools. This ensures more taxpayer dollars reach classrooms to support student achievement.

Collaborating with vendors and school business offices, the MCIU's cooperative purchasing initiative and operation of consortia resulted in savings in excess of \$30 million for participating districts and career-technical schools. Shared savings for the 2013-2014 school year include:

- \$252,225 for the 19 districts that participate in the MCIU-led cooperative purchasing initiative for transport of fuel
- \$337,922 for the 18 schools and 4 career-technical schools that participate in the waste disposal and recycling services (savings obtained over a 3-year period ending 2014-2015)
- \$519,305 on art, custodial, paper, computer and general supplies
- \$49,313 on Scholastic products
- \$123,600 in savings for various technology products, such as Power School, Meraki, Safariland Discovery and \$245,604 through the management of e-Rate applications/reimbursement
- More than \$12 million in savings for 20 districts participating in the Southern Pennsylvania School Trust (SPaST) self-insured description program and nearly \$14 million in savings for the medical insurance portion of the trust



*MCIU technology staff member Chris Kleinguenther and Cooperative Services Financial Specialist Missy Klaus prepare for the MCIU Supplies Bid Opening.*



Ten school districts took advantage of the MCIU's School Based ACCESS Program (SBAP) direct services billing program to maximize available funding to support their special education programs. By contracting with the MCIU Management Services Team, districts obtained federal Medicaid reimbursement provided for some school related therapies — a valuable offset to the cost of local special education programs.



# FINANCIAL

## 2013-2014 BUDGET OVERVIEW

The MCIU budget includes more than 15 funds, 37 separate funding sources and 119 cost centers. Total revenue for the MCIU in 2013-2014 was more than \$122 million. The revenues were derived from local, state and federal sources as listed in the pie charts. Other budget considerations are as follows:

- With no taxing authority, the MCIU relies heavily on state and federal revenue sources to operate certain programs. The state and federal revenue sources have remained essentially flat over the past 10 years, requiring the MCIU to seek alternate sources of revenue which include fee for service offerings based on the needs of the districts.
- In order to remain financially sound and continue to fulfill our mission of providing quality, educational services to the schools, the MCIU has worked hard to develop and expand fee-based services that increase our revenues and capacity to support districts.
- Costs of administrative overhead and other general support costs for member services are only partially covered by the membership fees that districts contribute to the Legislative & Grants Development Division, Curriculum, Instruction and Professional Development; and Technology and Information Services divisions. The additional costs must be offset by other revenue sources.

### MONTGOMERY COUNTY INTERMEDIATE UNIT 2013/2014 FISCAL SUMMARY

#### Expenditures (Unaudited)

Administration & Facilities	11,916,795
Curriculum, Instruction and Professional Development	2,012,640
Legislative Services and Grants Development	261,385
Nonpublic School Services	12,396,068
PaTTAN	8,746,802
Technology & Information Services	2,718,563
Transportation	8,937,499

#### Special Education

School Age	42,774,342
Early Intervention	20,809,714
Private Residential Rehabilitation Institute Funds	11,567,325

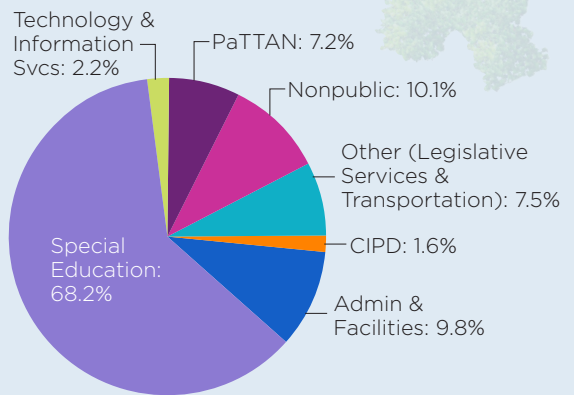
**Total 122,141,133**

#### Revenues (Unaudited)

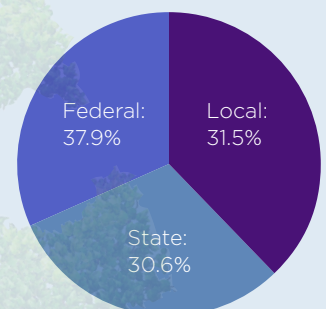
Local	38,596,486
State	54,300,190
Federal	29,244,457

**Total 122,141,133**

#### 2013/2014 Expenditures



#### 2013/2014 Revenue Sources



## BOARD OF DIRECTORS (2013-2014)

Burunda Prince-Jones  
President  
*Wissahickon*

Louis A. Polaneczky  
Vice President  
*Hatboro-Horsham*

Maura Buri  
Secretary  
*Upper Merion Area*

Thomas J. DiBello  
Treasurer  
*Spring-Ford Area*

Joseph Chmielewski  
Past President  
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*Bryn Athyn*

James F. Butt  
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Leslie Finegold  
*Colonial*

Dr. David Hakes  
*Upper Moreland Township*

Yuri Khalif  
*Lower Moreland Township*

Holly Kisailus  
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*Jenkintown*

Carolyn Murphy  
*North Penn*

Janice Pearce  
*Norristown Area*

James W. Phillips  
*Methacton*

Virginia Pollard  
*Lower Merion*

Rick Rabinowitz  
*Pottsgrove*

Donna M. Scheuren  
*Souderton Area*

William Scott  
*Upper Perkiomen*

Michelle J. Timpan  
*Abington*

W. Ronald Williams  
*Pottstown*

## CABINET LISTING (2013-2014)

Dr. Bradley C. Landis  
*Acting Executive Director*

Stan H. Wisler  
*Chief Financial Officer/  
Director, Management  
Services*

Donna Gaffney  
*Director, Curriculum,  
Instruction & Professional  
Development*

Jack Hurd  
*Director, Human Resources*

Gail Gedy  
*Director, Technology and  
Information Services*

Richard Rawlings  
*Director, Communications*

Lois Robinson  
*Director, Special Education*

Dr. Janet M. Sloand  
*Director, PaTTAN*

Valentina G. Viletto, Esq.  
*Director, Legislative Services  
and Grants Development*

Dr. Kenneth E. Voss  
*Director, Nonpublic School  
Services*

## STAY IN TOUCH

- Find us on the web at [www.mciu.org](http://www.mciu.org)
- Facebook—[www.facebook.com/mciu23](http://www.facebook.com/mciu23)
- Twitter—@MCIU
- YouTube—[www.youtube.com/user/mciu23](http://www.youtube.com/user/mciu23)
- Subscribe to our monthly Professional Development e-newsletter and quarterly MCIU *Update* newsletter via our homepage



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