

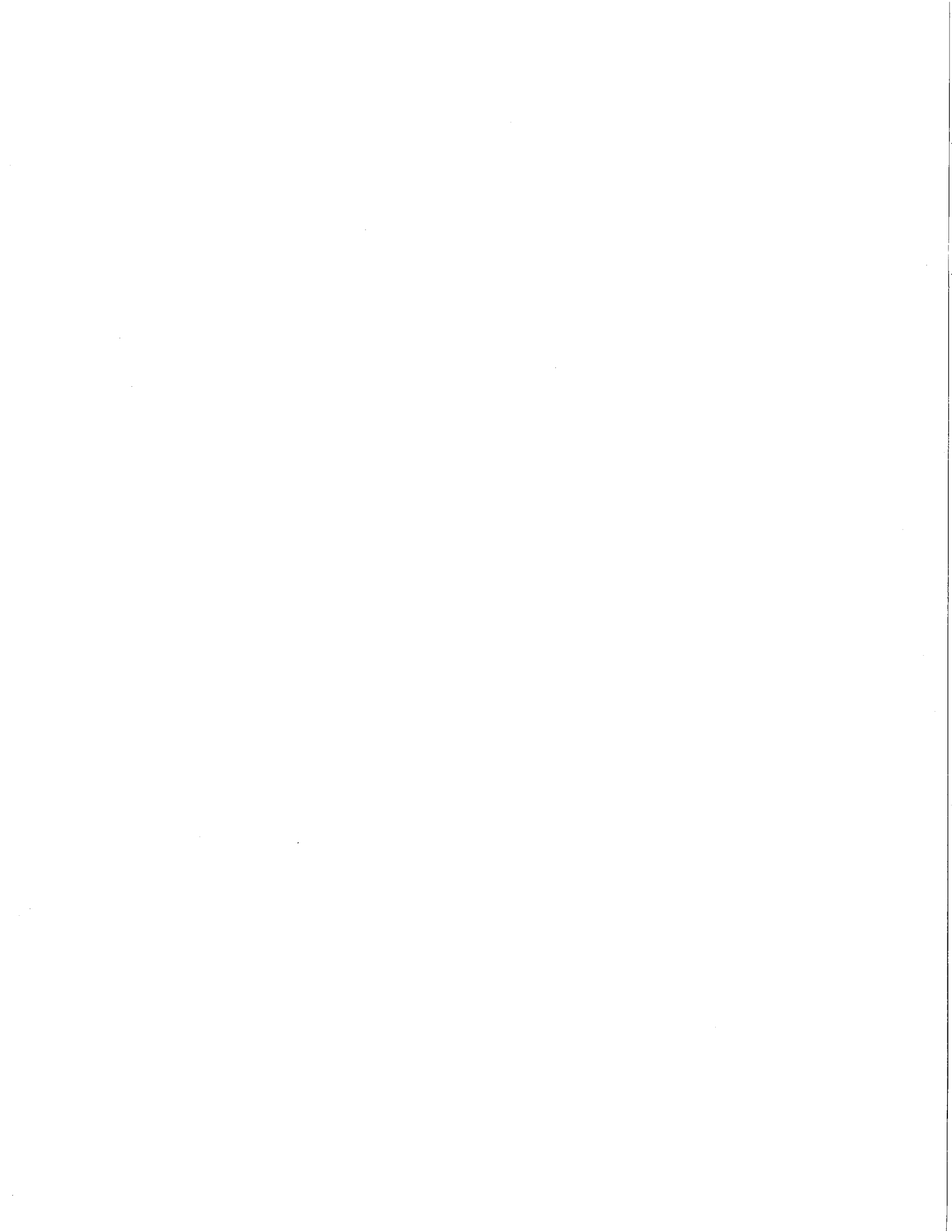
# **COLONIAL SCHOOL DISTRICT**

**Plymouth Meeting, Pa**

**[www.colonialsd.org](http://www.colonialsd.org)**

## **ADOPTED BUDGET 2009-10**

**June 18, 2009**



Colonial School District  
Plymouth Meeting, Pa

**2009-10 Adopted Budget  
Table of Contents**

	<b>Page</b>
<b>Organizational Section:</b>	1
Board of School Directors	2
Board Committees	6
District Administration	7
Consultants and Advisors	8
Budget Schedule	9
<b>Introductory Section:</b>	10
<b>Budget Overview for 2009-10</b>	11
<b>Act 1 and The Colonial School District</b>	15
Significant Laws that Affect Budget and Fiscal Administration	16
Significant Board Policy and Procedures that Affect Budget	21
Budget Development Process	24
Board Committee Structure	25
Budget Administration and Management Process	29
<b>Financial Section:</b>	32
District Financial Structure	33
Classification of Revenue and Expenditures	36
Revenue Classifications	37
Expenditure Classifications	43
Budget Comparisons	46
Revenue Sources	48
Chart - Revenue All Sources	50
Chart - Revenue Local Sources	51
Expenditures by Function	52
Chart - Expenditures by Function	53
Expenditures by Object	54
Chart - Expenditures by Object	55
Expenditures by Object Detail	56
Chart - Expenditures by Object Budget to Budget \$'s Comparison	59
Chart - Expenditures by Object Budget to Budget %'s Comparison	60
Expenditures by Object/Function – Summaries	61
Expenditures by Function/Object	65
Debt Service Schedule	70
<b>Informational Section:</b>	74
Enrollment History and Projections	75
Professional and Support Staff Report	77
Curriculum-Instruction-Assessment Budget Summary	79
Technology Hardware Budget	80
Facilities Projects	82
School Building Information	83

Colonial School District  
Plymouth Meeting, Pa

**2009-10 Adopted Budget  
Table of Contents**

<b>Historical Information</b>	<b>Page</b>
Expenditure Totals 1974-75 to 2009-10	84
Real Estate Tax Rates/Collections 1969-70 to 2009-10	85
Fund Balance 1969-70 to 2009-10	86
Assessments December 1985 to March 2009	87
Chart – Tax Base, Total Expenditures, Tax Increase, %'s 1995-96 to 2009-10	88
Revenue Sources Summary 1974-75 to 2009-10	89
Chart – Revenue Sources \$'s 1998-99 to 2009-10	90
Chart – Revenue Sources %'s 1998-99 to 2009-10	91
Chart – Total State Revenue to Total Expenditures 1986-87 to 2009-10	92
Chart – State Special Ed. Subsidy to Total Special Ed. Expenditures (1200 Function) 1992-93 to 2009-10	93
Chart – State Transportation Subsidy to Total Transportation Expenditures (2700 Function) 1992-93 to 2009-10	94
PSERS' History and Projection of Retirement Contribution Rates	95-97

**COLONIAL SCHOOL DISTRICT**  
**ORGANIZATIONAL SECTION**  
**2009-10 ADOPTED BUDGET**

**COLONIAL SCHOOL DISTRICT'S  
ORGANIZATIONAL STRUCTURE**

**BOARD OF SCHOOL DIRECTORS**

**Gary Johnson, President**

**Susan L. Moore, Vice-President**

**Lenore Bruno**

**Thomas Davis**

**Kelly Jowett**

**Hope Luken**

**William Ryan**

**Steven Slutsky**

**Mitch Zimmer**

**Non-Voting Officers**

**Dave Sherman, Secretary**

**Joseph P. Bickleman, Treasurer**

# **COLONIAL SCHOOL DISTRICT BOARD OF SCHOOL DIRECTORS**

**Mr. Gary J Johnson  
Board President, Sales  
Resident of Conshohocken**

Gary Johnson was elected to the School Board for four-year terms in 1995, 1999, 2003 and 2007. He was named President in February 2009. Mr. Johnson served 4 years as Vice President from 2004 - 2008. Mr. Johnson is a member and past Chairperson of the Human Resources Committee and is a member and past Chairperson of the Facilities Management and Transportation Committee and the Community Relations and Student Life Committee. He serves on the board's Safety and Wellness Committee and district's Technology Review Committee and is also on the board and serves as treasurer of the Central Montgomery County Area Vocational-Technical School.

Mr. Johnson was active in the Ridge Park Elementary School Parent Teacher Organization and the Colonial Parents' Council prior to joining the School Board.

**Ms. Susan L. Moore  
Board Vice President, Controller  
Resident of Plymouth Meeting**

Susan L. Moore was appointed to the School Board in December 2001, and elected to a four-year term in 2003 and 2007. Ms. Moore was named Vice President in February 2009. She is Chairperson of the Facilities Management and Transportation Committee and is a member of the Curriculum and Program Committee and the Safety and Wellness Committee. Mrs. Moore is on the Board of the Central Montgomery County Area Vocational-Technical School. She also serves as the board representative to the Plymouth-Whitemarsh High School Distinguished Graduates Organization.

Mrs. Moore, who holds a masters degree in education from Temple University, has extensive experience as a teacher in both public and private schools. She is quite familiar with the Colonial School District having volunteered and served as Vice President for both the Colonial Elementary School Parent Teachers Organization and the Colonial Middle School Home and School Association. She also has served on the Plymouth Whitemarsh High School Parent Teacher Student Organization and the Colonial Parents' Council. The current president of the Ply-Mar Swim and Tennis Club, Susan Moore is a past member of the Strategic Planning Evaluation Committee for Colonial.

**Ms. Lenore Bruno  
Healthcare Worker  
Resident of Conshohocken**

Lenore Bruno was appointed to the Board on December 15, 2008 to fill the remaining year of Dr. Pascal Scoles' term. Ms. Bruno is the Chairperson of the Safety and Wellness Committee and a member of the Facilities Management and Transportation Committee and the Community Relations Committee. She serves as the district's liaison to Plymouth Township and Plymouth's Parks and Recreation Board. Ms. Bruno was a member of the Plymouth Township Council from 2001 through 2008. She previously served on the Colonial School Board from 1987 through 1994 and has served on the Boards of the Colonial Foundation for Educational Innovation and the Colonial Exchange Club. She was a member of the Plymouth Township Parks and Recreation Board from 1993 through 1999 and held leadership roles with the Conshohocken Fun Fest Committee.

# **COLONIAL SCHOOL DISTRICT BOARD OF SCHOOL DIRECTORS (Continued)**

**Mr. Thomas Davis  
Quality Systems Consultant  
Resident of Fort Washington**

Tom Davis was elected to the School Board in 2001 and re-elected to a four-year term in 2005. He serves as Chairperson of the Curriculum and Program Committee and is a member and past Chairperson of the Human Resources Committee. Mr. Davis is the Board's representative to the Colonial Foundation for Educational Innovation (CFEI) and he is the past Chairman of the Joint Operating Committee (JOC) of the Central Montgomery Technical High School (CMTHS).

Mr. Davis served as chairperson of the CFEI for four years. He also was a member of the district's strategic planning committee and served as coordinator of the KOALATY KID program at Conshohocken Elementary School. Mr. Davis serves on the boards for the Northwest Interfaith Hospitality Network and Handi-Crafters, Inc., and in the past the Lewis & Clark Trail Heritage Foundation. He holds bachelor and master degrees in metallurgical engineering from the Rensselaer Polytechnic Institute and a business administration certificate from Villanova University. He has enjoyed a long career in quality systems and as a consultant. Mr. Davis served in the United States Navy during World War II.

**Mrs. Kelly Jowett  
Resident of Plymouth Meeting**

Kelly Jowett was appointed to the School Board on February 12, 2009. Jowett, a resident of Plymouth Meeting, has been involved with Ridge Park PTO for the past 6 years and has volunteered at Colonial Elementary School. She is currently a member of the Facilities Management/Transportation Committee and the Community Relations/Student Life Committee. Jowett holds a bachelors' degree from Rosemont College.

**Mrs. Hope Luken  
Tax Compliance Analyst  
Resident of Lafayette Hill**

Hope D. Luken was appointed to the School Board in August 2004, elected to a two-year term in 2005, and re-elected to a four-year term in 2007. She serves as Chairperson of the Human Resources Committee and is a member of the Finance and Audit, the Community Relations and Student Life Committee and the Safety and Wellness Committee. She was an active member of the Parent Teacher Organizations at Whitemarsh and Colonial Elementary Schools and Colonial Middle School and has held leadership positions in those organizations. Hope has served on the Board of Trustees of the William Jeanes Library, Chestnut Hill Meals on Wheels and Ply-Mar Swim Club. Hope is a graduate of Plymouth-Whitemarsh High School and Gettysburg College.

# **COLONIAL SCHOOL DISTRICT BOARD OF SCHOOL DIRECTORS (Continued)**

## **Dr. William Ryan**

**Social Worker and Psychological Services Associate for Mental Health  
Resident of Conshohocken**

Dr. William Ryan was appointed to the School Board in June 2002, elected to a two-year term in 2003, and re-elected to a four-year term in 2005. He is a member of the Curriculum and Program Committee, and the Finance and Audit Committee. He is also the Board's Municipal Government Liaison to the Borough of Conshohocken and the Pennsylvania School Boards Association.

Dr. Ryan holds a doctorate in social work from the University of Pennsylvania. He is a licensed clinical social worker with Norristown State Hospital. Dr. Ryan has more than 30 years of experience of inpatient and outpatient psychiatric care. Dr. Ryan is currently the Quality Assurance and Risk Manager for the Norristown State Hospital. In 1998 he received the Churchman Family Award for outstanding service in mental health.

Dr. William Ryan is generous with his time. He serves as a Director of the Conshohocken Youth Foundation and has volunteered with youth basketball and Little League Baseball programs in the community. He is the former Board Secretary for the Conshohocken Catholic Youth Organization.

## **Mr. Steven Slutsky**

**Compensation Consultant/Attorney  
Resident of Whitemarsh Township**

Steven Slutsky was appointed to the School Board in July, 2002, elected to a two-year term in 2003 and re-elected to a four-year term in 2005. He chairs the Finance and Audit Committee and is a member of the Human Resources Committee.

Mr. Slutsky is a past Chairman of the Whitemarsh Township Planning Commission. He is the President of the Philadelphia Chapter of the National Association of Stock Plan Professionals, and was a Corporation Member of The College of Settlement of Philadelphia, a not-for-profit organization that brings disadvantaged youth to a camp-like setting.

Steven Slutsky holds a B.S. degree from the University of Pennsylvania's Wharton School, and a J.D. and MBA from Boston University. He is a Director and Executive Compensation Consultant in the Philadelphia Office of the Human Resources Services business of PricewaterhouseCoopers, a global human resources consulting, assurance, tax and advisory service firm. He has worked with clients internationally, in nearly every industry sector, on a wide range of compensation and benefits issues. Previously, Slutsky was an employment, labor and benefits attorney with Philadelphia and New York law firms. Steven has substantial human resources, labor negotiation and related financial expertise.

## **Mr. Mitchell K. Zimmer**

**Pharmaceutical Sales Manager  
Resident of Lafayette Hill**

Mitch Zimmer was appointed to the School Board in June, 2004 and elected to a two-year term in 2005 and re-elected to a four-year term in 2007. He is chairman of the Community Relations and Student Life Committee, and serves on the Safety & Wellness and the Finance & Audit Committees. He is also the district's liaison to the Montgomery County Intermediate Unit. Mr. Zimmer served on the Plymouth Whitemarsh High School Scholarship Fund Board of Governors. He has been an active member of the Whitemarsh Youth Basketball League Board of Trustees since 1991 and was the league's President from 1991 through 1998. He presently is an officer of the local chapter of high school basketball referees. Mr. Zimmer also was a member of the Board of Trustees at Congregation Or Ami and was Brotherhood President. Mr. Zimmer is a graduate of Brooklyn College.

**COLONIAL SCHOOL DISTRICT**  
**BOARD COMMITTEES**

**FACILITIES MANAGEMENT AND TRANSPORTATION COMMITTEE**

Ms. Susan L. Moore, Chairperson  
Mrs. Kelly Jowett  
Ms. Lenore Bruno  
Liaison, Terry Yemm

**COMMUNITY RELATIONS AND STUDENT LIFE COMMITTEE**

Mr. Mitch Zimmer, Chairperson  
Mrs. Kelly Jowett  
Ms. Lenore Bruno  
Mrs. Hope Luken  
Liaisons, Cassandra DeLong & David Sherman

**SAFETY AND WELLNESS COMMITTEE**

Ms. Lenore Bruno, Chairperson  
Ms. Susan L. Moore  
Mrs. Hope Luken  
Mr. Mitch Zimmer  
Liaisons, Cassandra DeLong & David Sherman

**CURRICULUM AND PROGRAM COMMITTEE**

Mr. Thomas Davis, Chairperson  
Dr. William Ryan  
Ms. Susan L. Moore  
Liaisons, Dr. Mary Ellen Gorodetzer

**FINANCE AND AUDIT COMMITTEE**

Mr. Steven Slutsky, Chairperson  
Dr. William Ryan  
Mrs. Hope Luken  
Mr. Mitch Zimmer  
Liaison, Joseph P. Bickleman

**HUMAN RESOURCES COMMITTEE**

Mrs. Hope Luken, Chairperson  
Mr. Steven Slutsky  
Mr. Thomas Davis  
Liaison, Richard Hartz

**CENTER FOR TECHNICAL STUDIES JOINT OPERATING COMMITTEE:**

Mr. Thomas Davis  
Mr. Gary J. Johnson

**INTERMEDIATE UNIT #23 BOARD MEMBER  
PSBA REPRESENTATIVE  
COLONIAL FOUNDATION  
BOARD LIAISONS:**

Conshohocken Borough	Dr. William Ryan
Plymouth Parks & Recreation	Ms. Lenore Bruno
Plymouth Township	Ms. Lenore Bruno
Whitemarsh Parks & Recreation	Mrs. Hope Luken
Whitemarsh Township	Mrs. Hope Luken

**COLONIAL SCHOOL DISTRICT  
ORGANIZATION  
DISTRICT ADMINISTRATION**

[www.colonialsd.org](http://www.colonialsd.org)

<b>Dr. Vincent F. Cotter</b>	<b>Superintendent of Schools</b>	<b>834-1670 Ext. 2132</b>
<b>Dr. Mary Ellen Gorodetzer</b>	<b>Assistant Superintendent</b>	<b>834-1670 Ext. 2135</b>
<b>Joseph P. Bickleman</b>	<b>Chief Financial Officer/ Board Treasurer</b>	<b>834-1670 Ext. 2121</b>
<b>Andrew Boegly</b>	<b>Chief Information Officer</b>	<b>834-1670 Ext. 2129</b>
<b>Cassandra DeLong</b>	<b>Director of Pupil Services</b>	<b>834-1670 Ext. 2111</b>
<b>Richard Hartz</b>	<b>Director of Human Resources</b>	<b>834-1670 Ext. 2152</b>
<b>Terry Yemm</b>	<b>Director of Operations</b>	<b>834-1670 Ext. 2131</b>
<b>Elizabeth McKeaney</b>	<b>Director of Curriculum, Instruction and Assessment</b>	<b>834-1670 Ext. 2155</b>
<b>Donna Gaffney</b>	<b>Curriculum Supervisor- Mathematics/Science</b>	<b>834-1670 Ext. 2144</b>
<b>Kathleen Hamill</b>	<b>Curriculum Supervisor- Language Arts</b>	<b>834-1670 Ext. 2225</b>
<b>Sergio Anaya</b>	<b>Curriculum Supervisor- Social Studies &amp; ESL</b>	<b>834-1670 Ext. 2164</b>
<b>Rebe Hayes-Kennedy</b>	<b>Supervisor of Spec. Ed., K-5</b>	<b>834-1670 Ext. 2134</b>
<b>Eileen Specter</b>	<b>Supervisor of Spec. Ed., 6-12</b>	<b>834-1670 Ext. 2105</b>
<b>Dr. Monica Sullivan</b>	<b>Principal, P-W HS</b>	<b>825-1500 Ext. 1085</b>
<b>Robert Fahler</b>	<b>Principal, Middle School</b>	<b>275-5104 Ext. 7150</b>
<b>Teresa Boegly</b>	<b>Principal, Colonial Elem.</b>	<b>941-0426 Ext. 2230</b>
<b>Denise Marks</b>	<b>Principal, Conshohocken El.</b>	<b>828-0362 Ext. 5001</b>
<b>Judi Lipson</b>	<b>Principal, Plymouth Elem.</b>	<b>825-8190 Ext. 6001</b>
<b>Jason Bacani</b>	<b>Principal, Ridge Park Elem.</b>	<b>825-1083 Ext. 4001</b>
<b>Donna Drizin</b>	<b>Principal, Whitemarsh Elem.</b>	<b>828-9092 Ext. 3001</b>
<b>Paul Antal</b>	<b>District Safety Officer</b>	<b>825-1500 Ext. 1224</b>
<b>Lori McCoy</b>	<b>Director of Food Services</b>	<b>834-1670 Ext. 2125</b>
<b>John Quinn</b>	<b>Director of CITV</b>	<b>825-1500 Ext. 1093</b>
<b>David M. Sherman</b>	<b>Director of Community Relations/Board Secretary</b>	<b>834-1670 Ext. 2115</b>
<b>Kathleen Ellis</b>	<b>Director of Transportation</b>	<b>834-1670 Ext. 2141</b>
<b>Joe Lally</b>	<b>Facilities Manager</b>	<b>825-1500 Ext. 1066</b>

**COLONIAL SCHOOL DISTRICT**  
**CONSULTANTS AND ADVISORS**

**Independent Auditors**

**Barbacane, Thornton & Company**  
**14 West Third Street**  
**Media, PA 19063**  
**(610) 565-5222**

**Solicitor**

**Fox, Rothschild, LLP**  
**1250 Broad Street-Suite 1000**  
**Lansdale, PA 19446-0431**  
**(215) 299-2167**

**Special Counsels**

**Sweet, Stevens, Tucker & Katz**  
**116 East Court Street**  
**Doylestown, PA 19401**  
**(215) 348-5862**

**Official Depository**

**Wachovia Bank**  
**Government Banking Division**  
**2240 Butler Pike - Suite 300**  
**Plymouth Meeting, PA 19462**  
**(610) 834-2013**

**Colonial School District**

**2009-10 Budget Schedule**

<b>Budget Materials to Buildings</b>	<b>September 30, 2008</b>
<b>Enrollment Projections and Allocations To Buildings</b>	<b>December 5, 2008</b>
<b>Meetings between Building Principals and Director of Operations</b>	<b>December 1-12, 2008</b>
<b>Building Budgets submitted to Chief Financial Officer</b>	<b>January 14-February 11, 2009</b>
<b>Building Budget Reviews with Superintendent and Administrators</b>	<b>March 23-March 27, 2009</b>
<b>Curriculum Committee Report</b>	<b>March 16, 2009</b>
<b>Facilities Mgmt. &amp; Transportation Committee Report</b>	<b>March 16, 2009</b>
<b>Human Resources Committee Report</b>	<b>March 19, 2009</b>
<b>Preliminary Budget Available to Public</b>	<b>April 13, 2009</b>
<b>Preliminary Budget Approved - Finance Committee Report</b>	<b>April 16, 2009</b>
<b>Proposed Final Budget Approved</b>	<b>May 21, 2009</b>
<b>Final Budget Approval</b>	<b>June 18, 2009</b>

**INTRODUCTORY SECTION**  
**2009-10 ADOPTED BUDGET**

