

**AMITY REGIONAL SCHOOL DISTRICT NO. 5**  
**Bethany Orange Woodbridge**  
**25 Newton Road, Woodbridge, Connecticut 06525**

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**Dr. Jennifer P. Byars**  
**Superintendent of Schools**

**AMITY REGIONAL BOARD OF EDUCATION REGULAR MEETING AGENDA**  
**Monday, March 9, 2020, 6:30 pm**  
**25 Newton Road, Woodbridge, CT**

- 1. CALL TO ORDER**
- 2. PLEDGE OF ALLEGIANCE**
- 3. APPROVAL OF MINUTES**
  - a. Regular Board of Education Meeting – February 10, 2020 *Page 3*
  - b. Special Board of Education Meeting -- February 20, 2020 *Page 8*
- 4. PRESENTATION OF CABE COMMUNICATIONS AWARD OF EXCELLENCE**
- 5. RECOGNITION OF NATIONAL MERIT SCHOLARSHIP FINALISTS** *Page 10*
- 6. STUDENT REPORT**
  - a. Monthly Report
- 7. PUBLIC COMMENT**
- 8. DISCUSSION AND POSSIBLE ACTION ON SPRING 2021 INTERNATIONAL TRIP FOR AMITY REGIONAL HIGH SCHOOL STUDENTS**
- 9. SUPERINTENDENT'S REPORT**
  - a. Personnel Report *Page 11*
  - b. Superintendent Report *Page 12*
- 10. CORRESPONDENCE**
- 11. CHAIRMAN'S REPORT**
  - a. Committee Reports
    1. ACES
    2. Ad Hoc School Safety
    3. CABE
    4. Curriculum
    5. District Health and Safety
    6. District Technology
      - a. Monthly Report *Page 16*
    7. Facilities
      - a. Monthly Report *Page 17*
    8. Finance
      - a. Discussion and Possible Action on Contracts over \$35,000 *Page 18*
        1. Auditing Services
        2. Investment Consultant
        3. Health Insurance Consultant
      - b. Discussion of Monthly Statements *Page 20*
      - c. Director of Finance and Administration Approved Transfers Under \$3,000 *Page 46*

- d. Discussion and Possible Action on Budget Transfers over \$3,000  
*Page 47*
- e. Proposed Budget Update *Page 49*
- f. Other
  - 1. Food Service Update *Page 51*
- 9. Policy
  - a. First Read
    - 1. Policy 4112.6 Personnel Records *Page 60*
    - 2. Policy 5132 Dress and Grooming *Page 64*
  - b. Second Read
    - 1. Policy 0200 District Goals for Student Accomplishment *Page 66*
    - 2. Policy 3231 Medical Reimbursement for Special Education Students *Page 68*
    - 3. Policy 3432 Budget & Expense Report/Annual Financial Statement *Page 70*
    - 4. Policy 5118.1 Homeless Students *Page 71*
    - 5. Policy 5124.1 Reporting to Parents *Page 77*
    - 6. Policy 5141 Student Health Services *Page 81*
    - 7. Policy 5142 Student Safety *Page 91*
    - 8. Policy 6145 Extra Class Activities *Page 95*
    - 9. Policy 6145.2 Instruction Interscholastic/Intramural Athletics *Page 99*
  - 10. Personnel
  - 12. PROPOSED TRANSPORTATION AGREEMENT (Executive Session anticipated)**
    - a. Discussion and Possible Action on Proposed Transportation Agreement for Preparation of Transportation Contracts
  - 13. NEW BUSINESS**
  - 14. ITEMS FOR THE NEXT AGENDA – Due to Chairperson by March 23, 2020**
  - 15. ADJOURNMENT**



Jennifer P. Byars  
Superintendent of Schools

JPB/pjp

pc: Town Clerks: Bethany, Orange, Woodbridge

***Working to "enable every Amity student to become a lifelong learner  
and a literate, caring, creative and effective world citizen."***  
*District Mission Statement*

If you require accommodations to participate because of a disability,  
please contact the office of the Superintendent of Schools in advance at 203-397-4811.

AMITY REGIONAL SCHOOL DISTRICT NO. 5 BOARD OF EDUCATION  
FEBRUARY 10, 2020 REGULAR MEETING MINUTES  
6:30 P.M., 100 OHMAN AVENUE, ORANGE, CT

**BOARD MEMBERS PRESENT**

Chairman John Belfonti, Robyn Berke, Christopher Browe, Patricia Cardozo, Shannan Carlson, Paul Davis, Steven DeMaio, Carla Eichler, George Howard, Sheila McCreven (departed 10:15 p.m.), Patrick Reed, Dr. Jennifer Turner

**BOARD MEMBERS ABSENT**

Andrea Hubbard

**STUDENT REPRESENTATIVES PRESENT**

Caroline Chen, Olivia Gross, Ella Marin

**STAFF MEMBERS PRESENT**

Dr. Jennifer Byars, Theresa Lumas, Thomas Brant, Kathy Burke, Dr. Richard Dellinger, Shaun DeRosa, Brian Dower, Kathleen Kovalik, Anna Mahon, Dr. Marie McPadden, Thomas Norton, Miguel Pickering, Brian Serapiglia

**1. CALL TO ORDER**

Chairman Belfonti called the meeting to order at 6:46 p.m.

**2. PLEDGE OF ALLEGIANCE**

Recited by those present.

**3. APPROVAL OF MINUTES**

- a. Regular Board of Education Meeting – January 13, 2020

*MOTION by George Howard, Second by Carla Eichler, to approve minutes as submitted*  
*VOTES IN FAVOR, 9 (DeMaio, Howard, Davis, McCreven, Browe, Reed, Cardozo, Eichler, Berke)*  
*ABSTAINED, 2 (Turner, Carlson)*  
*MOTION CARRIED*

**4. STUDENT REPORT**

- a. Monthly Report

**5. PUBLIC COMMENT**

None

**6. PRESENTATION OF ANNUAL FINANCIAL STATEMENTS FOR FISCAL YEAR 2018-2019**

AMITY REGIONAL SCHOOL DISTRICT NO. 5 BOARD OF EDUCATION  
FEBRUARY 10, 2020 REGULAR MEETING MINUTES  
6:30 P.M., 100 OHMAN AVENUE, ORANGE, CT

**7. PRESENTATION AND POSSIBLE ACTION ON SUPERINTENDENT'S PROPOSED 2020-2021 BUDGET**

**8. SUPERINTENDENT'S REPORT**

- a. Personnel Report
- b. Superintendent Report

**9. CORRESPONDENCE**

**10. CHAIRMAN'S REPORT**

- a. Committee Reports
  - 1. ACES
  - 2. Ad Hoc School Safety
  - 3. CAGE
  - 4. Curriculum
    - a. Discussion and Possible Action on Textbook Approvals:
      - 1. Bring Science Alive: Space, Planet Earth, and Weather and Climate: Science Grade 7
      - 2. Autentico 1: World Language Grade 7
      - 3. Entreculturas: Spanish Book Series High School
      - 4. Entreculturas: French Book Series High School
      - 5. Inspire Physics: High School

*MOTION by Patricia Cardozo, Second by Christopher Browe, to approve all books listed: Bring Science Alive: Space, Planet Earth, and Weather and Climate: Science Grade 7; Autentico 1: World Language Grade 7; Entreculturas: Spanish Book Series High School; Entreculturas: French Book Series High School; Inspire Physics: High School*

*VOTES IN FAVOR, 11 (unanimous)*

*MOTION CARRIED*

- 5. District Health and Safety
- 6. District Technology
  - a. Monthly Report

AMITY REGIONAL SCHOOL DISTRICT NO. 5 BOARD OF EDUCATION  
FEBRUARY 10, 2020 REGULAR MEETING MINUTES  
6:30 P.M., 100 OHMAN AVENUE, ORANGE, CT

7. Facilities

a. Monthly Report

8. Finance

a. Discussion of Fourth Quarter 2019 Executive Summary Review of Amity Pension Fund, Sick and Severance Account and OPEB Trust

b. Discussion and Possible Action on Assignment of Contract

1. Fiduciary Investment Advisors (FIA) to DiMeo Schneider & Associates, LLC

*MOTION by Steven DeMaio, Second by Shannan Carlson, to assign the current contract with Fiduciary Investment Advisors, LLC to DiMeo Schneider & Associates, LLC*  
*VOTES IN FAVOR, 11 (unanimous)*  
*MOTION CARRIED*

c. Discussion and Possible Action on Contract of \$35,000 or more

1. Air Handlers (5) Amity High School (Bond Project)

*MOTION by Dr. Turner, Second by Steven DeMaio, to award Sav-Mor Cooling and Heating Inc. of Southington, CT the contract for replacing five (5) air handlers and the return air fan on air handler 11 at the bid price, including the Alternate 1 of \$644,000*  
*VOTES IN FAVOR, 11 (unanimous)*  
*MOTION CARRIED*

d. Discussion and Possible Action on the Adult Meal Price at the Middle Schools

*MOTION by Shannan Carlson, Second by Steven DeMaio, to authorize the Administration to raise lunch prices at Amity Middle School in Bethany and Amity Middle School in Orange 30 cents to \$4.00 for adult meals*  
*VOTES IN FAVOR, 11 (unanimous)*  
*MOTION CARRIED*

e. Discussion of Monthly Financial Statements

f. Director of Finance and Administration Approved Transfers Under \$3,000

AMITY REGIONAL SCHOOL DISTRICT NO. 5 BOARD OF EDUCATION  
FEBRUARY 10, 2020 REGULAR MEETING MINUTES  
6:30 P.M., 100 OHMAN AVENUE, ORANGE, CT

g. Discussion and Possible Action on Budget Transfers over \$3,000

*MOTION by Patricia Cardozo, Second by Christopher Browe, to approve the following budget transfer to cover the cost of a long-term substitute administrator for the Coordinator of Pupil Services:*

<b>ACCOUNT NUMBER</b>	<b>ACCOUNT NAME</b>	<b>FROM</b>	<b>TO</b>
04-12-1200-5330	Professional Technical Services	\$45,320	
05-15-1026-5111	Salaries		\$45,320

VOTES IN FAVOR, 11 (unanimous)

MOTION CARRIED

*MOTION by Paul Davis, Second by Patrick Reed, the following budget transfers to cover various repair and maintenance items incurred and for the remainder of the year:*

<b>ACCOUNT NUMBER</b>	<b>ACCOUNT NAME</b>	<b>FROM</b>	<b>TO</b>
01-14-2600-5715	Improvements to Buildings	\$4,100	
01-14-2600-5420	Repairs & Maintenance		\$4,100
01-14-2600-5720	Improvements to Sites	\$7,000	
02-14-2600-5420	Repairs & Maintenance		\$7,000

VOTES IN FAVOR, 11 (unanimous)

MOTION CARRIED

9. Policy

a. First Read

1. Policy 0200 District Goals for Student Accomplishment
2. Policy 3231 Medical Reimbursement for Special Education Students
3. Policy 3432 Budget & Expense Report/Annual Financial Statement
4. Policy 5118.1 Homeless Students
5. Policy 5124.1 Reporting to Parents
6. Policy 5141 Student Health Services
7. Policy 5142 Student Safety
8. Policy 6145 Extra Class Activities
9. Policy 6145.2 Instruction Interscholastic/Intramural Athletics

10. Personnel

AMITY REGIONAL SCHOOL DISTRICT NO. 5 BOARD OF EDUCATION  
FEBRUARY 10, 2020 REGULAR MEETING MINUTES  
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**11. DISCUSSION OF POSSIBLE LITIGATION WITH BOARD OF EDUCATION ATTORNEY (EXECUTIVE SESSION)**

*MOTION by Sheila McCreven, Second by Patrick Reed, to enter Executive Session to discuss possible litigation and invite Dr. Byars, Theresa Lumas, Thomas Brant, and Attorney Michelle Laubin*

*VOTES IN FAVOR, 11 (unanimous)*

*MOTION CARRIED*

Entered Executive Session at 9:00 p.m.

Exited Executive Session at 9:45 p.m.

**12. DISCUSSION OF SUPERINTENDENT'S MID-YEAR EVALUATION (EXECUTIVE SESSION)**

*Entered Executive Session by unanimous consent to discuss Superintendent's Mid-Year Evaluation*

Entered Executive Session at 9:46 p.m.

Exited Executive Session at 10:15 p.m.

**13. ACTION ON SUPERINTENDENT'S MID-YEAR EVALUATION**

**14. NEW BUSINESS**

**15. ITEMS FOR THE NEXT AGENDA – Due to Chairperson by February 24, 2020**

**16. ADJOURNMENT**

*MOTION by Christopher Browe, Second by Steven DeMaio, to adjourn meeting*

*VOTES IN FAVOR, 11 (unanimous)*

*MOTION CARRIED*

Meeting adjourned at 10:18 p.m.

Respectfully submitted,

*Pamela Pero*

Pamela Pero

Recording Secretary

AMITY REGIONAL SCHOOL DISTRICT NO. 5 BOARD OF EDUCATION  
FEBRUARY 20, 2020 SPECIAL MEETING MINUTES  
6:00 P.M., 25 NEWTON ROAD, WOODBRIDGE, CT

**AMITY BOARD MEMBERS PRESENT**

John Belfonti, Christopher Browe, Patricia Cardozo, Shannan Carlson, Paul Davis, George Howard, Andrea Hubbard, Patrick Reed, Dr. Jennifer Turner

**AMITY BOARD MEMBERS ABSENT**

Robyn Berke, Steven DeMaio, Carla Eichler, Sheila McCreven

**AMITY STAFF MEMBERS PRESENT**

Dr. Jennifer Byars, Theresa Lumas, Thomas Norton

**BETHANY BOARD MEMBERS PRESENT**

EJ Maher

**BETHANY STAFF MEMBERS PRESENT**

Colleen Murray, Tom Reed

**ORANGE BOARD MEMBERS PRESENT**

Charles Flynn, Betty Hadlock, William Kraut, Mary Welandar

**ORANGE STAFF MEMBERS PRESENT**

Vince Scarpetti

**OTHER TOWN OFFICIALS PRESENT**

Paula Cofrancesco, Sandra Stein, James Zeoli

**WOODBIDGE BOARD MEMBERS PRESENT**

Dan Cowan, Lynn Piascyk, Joyce Shavers, Jeffrey Townsend

**WOODBIDGE STAFF MEMBERS PRESENT**

Bob Gilbert, Cheryl Mammen, Analisa Sherman, Nancy Smerekanicz

**1. CALL TO ORDER**

Chairperson Belfonti called the meeting to order at 6:09 p.m.

Pledge of Allegiance was recited by those present.



AMITY REGIONAL SCHOOL DISTRICT NO. 5 BOARD OF EDUCATION  
FEBRUARY 20, 2020 SPECIAL MEETING MINUTES  
6:00 P.M., 25 NEWTON ROAD, WOODBRIDGE, CT

**2. COOPERATIVE ARRANGEMENTS AND OTHER ARRANGEMENTS BETWEEN BOARDS OF EDUCATION  
PRESENTATION – Dr. Ruth Levy**

Dr. Ruth Levy gave a presentation on regionalization, followed by a question and answer session.

**3. ADJOURNMENT**

*Motion by Christopher Browe, Second by Paul Davis, to adjourn the meeting*

*VOTES IN FAVOR 8 (unanimous)*

*MOTION CARRIED*

Meeting adjourned at 7:21 p.m.

Respectfully submitted,



Jennifer Byars, Superintendent of Schools



**2019~2020**

# **NATIONAL MERIT SCHOLARSHIP PROGRAM**

***\*Finalists\****

- 👍 **SAMUEL EPSTEIN**
- 👍 **CLAIRE HOSEY**
- 👍 **AKSHAT KULKARNI**
- 👍 **DANIELLE LEE**
- 👍 **RAYMOND LU**
- 👍 **SIENNA WANG**
- 👍 **SOPHIA WANG**
- 👍 **VICTOR YOU**
- 👍 **ZACHARY YOUNG**



# AMITY REGIONAL SCHOOL DISTRICT NO. 5

Bethany Orange Woodbridge  
25 Newton Road, Woodbridge, Connecticut 06525



Dr. Jennifer P. Byars  
Superintendent of Schools

jennifer.byars@amityregion5.org  
203.392.2106

March 9, 2020

To: Members of the Board of Education  
From: Jennifer P. Byars, Ed.D., Superintendent of Schools  
Re: Personnel Report

## NEW HIRES-CERTIFIED:

### • Amity Regional High School:

*Alyssa Kopjanski* – F/T Special Education Teacher (1 yr) – Alyssa began her career as a behavioral technician for Benhaven Children's Behavioral Services prior to beginning her student teaching at ACES. She will serve as a special education teacher for the remainder of the 2019-20 school year at Amity Regional High School. Alyssa earned her Bachelor's Degree in Special Education from Southern Connecticut State University.

- Amity Regional Middle School – Bethany: NONE
- Amity Regional Middle School – Orange: NONE

## NEW HIRES-SUBSTITUTES:

*Gang (Amy) Su* – Long Term Substitute Chinese Language Teacher – Both Amity Middle Schools

## NEW HIRES-NON-CERTIFIED:

*Stacy Bergantino* – Paraprofessional – Amity Regional High School

## NEW HIRES-COACHES:

*Robert Murphy* – Girls Outdoor Track Coach - 2020 Spring Season – Amity Middle School-Bethany

*Andres Bernal-Ruiz* – Asst. Tennis Coach - 2020 Spring Season – Amity Regional High School

*Andrew Starrett* – Asst. Boys Lacrosse Coach - 2020 Spring Season – Amity Regional High School

*Akeem Elliott-Lazarus* – Asst. Boys Outdoor Track Coach - 2020 Spring Season – Amity Reg. High School

*Christopher Elledge* – Asst. Girls Lacrosse Coach - 2020 Spring Season – Amity Regional High School

## TRANSFERS:

*Kevin Collesano* – 5 day bench substitute at Amity Middle School-Bethany to Paraprofessional at Amity Middle School-Bethany, eff. 03/02/2020

## RESIGNATIONS:

*Jon Faitsch* – Varsity Boys Cross Country Head Coach – ARHS, eff. 02/11/2020

*Jon Faitsch* – Asst. Varsity Boys Track Coach – ARHS, eff. 02/11/2020

*Anthony Capozziello* – Baseball Coach – AMSO, eff. 02/26/2020

## RETIREMENTS:

*Lynn Edwards* – Special Education Teacher, Amity Regional High School, eff. 06/30/2020

# AMITY REGIONAL SCHOOL DISTRICT NO. 5

Bethany Orange Woodbridge  
25 Newton Road, Woodbridge, Connecticut 06525



Dr. Jennifer P. Byars  
Superintendent of Schools

jennifer.byars@amityregion5.org  
203.392.2106

## Superintendent's Report – March 2020

Continuously improve instruction, cultivate creativity, and enhance student engagement and performance.

Enhance the efficient and effective use of resources.

Foster a supportive climate for students and adults.

*March is National School Board Member Appreciation Month. Please know that our entire Amity community appreciates the efforts you make on behalf of our students. You work with heart and heads and always consider what is best for kids. I know this role takes time and effort and I would like to say thank you for all you give.*

### Instruction

**Pupil Services Update:** AMSB hosted their Special Education informational nights for incoming 6<sup>th</sup> grade students respectively. A special thank you to the staff from AMSB! Unified Sports hosted a Unified Basketball Tournament at ARHS on March 4, 2020! The SAILS classroom at AMSO hosted their annual Valentine's Day gathering. Students enjoyed food, dancing, and socializing with students from all grade levels! SAILS at ARHS continues to run a snack shop in the faculty lounge at ARHS. Money raised through the snack shop goes to their end of the year celebration events. Future *Office Hours with the Director* (7:30-8:30) are April 24 and May 26, 2020.

**Middle School Readers Workshop Study Group:** Mrs. Burke and Dr. McPadden have arranged for middle school ELA teachers and reading consultants to visit Regional School District No.15 on March 26, 2020. The group will visit to observe one-seventh and one-eighth grade Readers Workshop Model at Rochambeau Middle School. Amity teachers will also have an opportunity to debrief with the teachers following the observations. The joint committee will meet to debrief as a whole group at a later date.

**March 20, 2020 Full-Day District Professional Learning for Teachers and Staff:** Several morning workshops will be offered for teachers and administrators including technology sessions, instructional strategies, trauma-informed classrooms, questioning techniques, and unifying writing at Amity. After the morning sessions, participants will engage in a variety of Wellness activities followed by lunch. After lunch, teachers will be given time to work on their professional focus for the remainder of the day. A CREC consultant will continue training for all district paraeducators.

**Check-ins with Interdisciplinary Professional Learning Communities:** As part of the midyear check-in with teachers, Mrs. Mahon has met with every inter-disciplinary PLC group to engage in discussions about instructional rounds, social and civic expectation discussions, and ask for feedback on this year's work in PLC. Teachers have used the time this year to discuss what the school-wide learning expectations, specifically the social and civic, look like in various classes throughout the building as well as share their thoughts, ideas and reflections on their professional goals, and learn from their colleagues through discussion and instructional rounds.

**ARHS 2020-2021 Scheduling Process:** In preparation for next school year, the scheduling communications, recommendations and selection of classes has been completed by counselors, teachers, students and parents. The next phase will be to begin to organize the requests and have discussions with

department leaders about sections and classes that will run. The master schedule will be built by the beginning of May and students/parents will receive a course list for the 2020-2021 school year by the end of May.

**Middle School Scheduling Process:** The scheduling process of selecting and verifying classes for both current seventh and eighth graders was done electronically using PowerSchool. Jill LaPlante, Director of School Counseling, and other high school staff met all 8th grade students during the first week of February and provided information regarding course selection and high school course requirements for graduation.

**AMSB 7<sup>th</sup> Grade Awareness of Global & Local Issues:** 7th graders at AMSB presented their Global Issues projects to their families, friends, and the Amity community on Thursday, March 5, 2020 in the AMSB Gym. Presentations were open-house, exposition-style. The students have been working hard on these projects for nearly 6 weeks. Issues included access to water, access to education, disease and epidemics, use of child soldiers, LGBTQ and gender rights, refugee crises, and habitat preservation. Student groups presented an informational poster, an awareness campaign (which could be presented with technology, art, or music), as well as an individual argumentative essay, in which they advocated for what they believe to be the best organization for their chosen issue.

**AMSB Solo & Ensemble Concert:** Some of the finest of the AMSB music department performed in the annual Solo & Ensemble concert on Thursday, February 13, 2020. The program included a variety of musical styles and genres performed by choir, band, and strings students. There was a mixture of solos, duets, and small ensembles featuring the Jazz band and Chamber singers.

## **Resources**

**Professional Learning Opportunities through Faculty Meetings:** In an effort to foster a continuous learning environment, partner with community entities, and exercise cost savings, the high school administration continues to host professional learning activities during monthly faculty meetings. The March meeting focused on a brief presentation from the counseling department on trauma-responsive classrooms and the cognitive behavior intervention for trauma in schools (CBITS) training they have been working on through this year, as well as a joint presentation from athletic trainer Kim Pearce and members of our local AMR team who re-trained the faculty in hands-only CPR. Neither presentation was a cost to the district.

**Jack Levine Efficiency Award:** The 2020 call for applications has been sent to students and parents in the Amity community.

**Restorative Training of Trainers (TOT):** Three days of training will take place on March 30, 31, and April 1, 2020. Twelve teachers and administrators who completed the initial two-day training will become trainers for the district. This cost saving model will allow the district to have a cadre of in-district trainers.

**AMSO Repurposes Counter Tops and Shelving:** Shelving and countertops in the old computer labs are being removed and used in a variety of locations throughout the district. The shelving is being custom cut to help finish the security offices and add shelving space to other offices throughout the district.

**Mardi Gras Party for 8<sup>th</sup> Graders at Amity Regional High School:** On Friday, February 21, 2020, Woodbridge Youth Services, in collaboration with Orange Youth Services, organized the first *Tri-Town 8<sup>th</sup> Grade Mardi Gras Party at Amity Regional High School*. This was a party for 8<sup>th</sup> grade residents of Woodbridge, Bethany, and Orange.

## **Climate**

**Signs of Suicide Screening with 9<sup>th</sup> Grade:** As part of our work with Sandy Hook Promise, faculty members from the counseling and physical education/health departments led lessons on “signs of suicide” and had all 9<sup>th</sup> grade students complete a prevention screening for suicide. The lessons and screening also served as an opportunity for inter-disciplinary collaboration for faculty members and administrators. Students at Bethany Middle School will also participate in this program on March 9<sup>th</sup> and Orange Middle School on March 11<sup>th</sup>.

**Continued Vigilance with “SpeakUp” Program:** Members of the ARHS community have continued to use the SpeakUp program vigilantly to report various concerns, including issues with vandalism, concern for other students in the building, concerning behavior by students, and inappropriate parking concerns. From January, 2019-June, 2019, there were 11 total reports through SpeakUp. From January, 2020-March 3<sup>rd</sup>, 2020, there have been 28 messages, and over 50 throughout this school year.

**Be AMITY Assemblies:** On February 14, 2020, AMSB students celebrated at the 100th Day of School “Be AMITY” assembly. We recognized Character of the Quarter students for their “Motivation,” conducted team-building activities, and raffled off gift cards, Amity socks, and bracelets to 10 lucky students.

**AMSB School-Wide Collection:** The Student Council and SAVE-Promise Clubs sponsored a Food Drive during the first two weeks in February and collected over 1,300 items that were donated to Woodbridge Youth Services for distribution. Students brought in nonperishable food items to their Advisory teacher and there was a “Canstruction” contest using the items. Prizes were awarded to the Advisory Group that used the most food items in their Canstruction and for the group that showed the most creativity.

**Orientations for 6<sup>th</sup> Grade Parents/Guardians/Students at AMSB:** On February 27, 2020 AMSB held a 7<sup>th</sup> Grade Orientation Night for current 6<sup>th</sup> grade parents/guardians. A smaller orientation session for parents who have students with special needs was held in the media center prior to the orientation for all parents/guardians. Approximately 200 parents attended the session. The principal, counselor, and other staff also visited both BCS and BRS the same day and gave an orientation to all students.

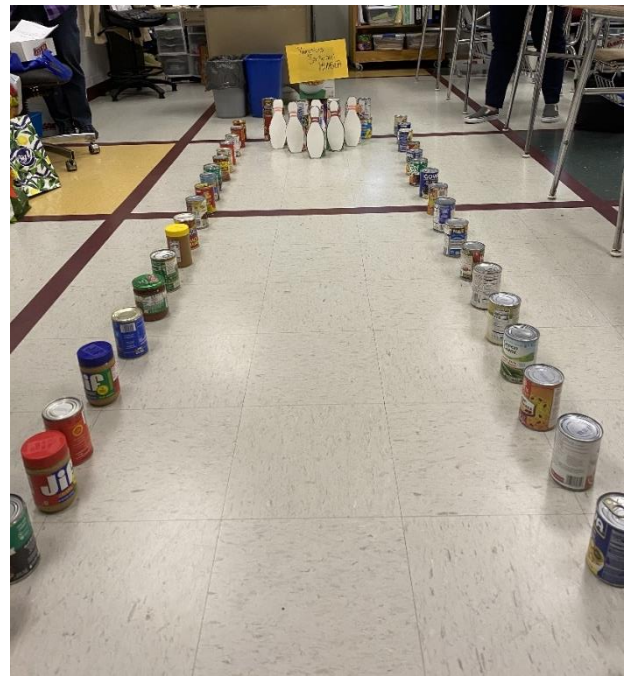
**AMSO Jackie’s Nine Assembly:** AMSO student attended a school wide presentation by Mr. John Tartaglio. Mr. Tartaglio touched upon several Jackie’s Nine character traits including perseverance, determination, and courage. He shared his personal story overcoming his physical disability to become a highly successful athlete, businessman, husband, and father.

**AMSO Adds New Club with Focus on Tolerance and Diversity:** A new club addressing acceptance and tolerance in the LGBTQ community was started on Feb. 25, 2020. The club was well attended and is off to a positive start.

**Community Outreach:** To continue to foster leadership opportunities for students as well as positive relationships with the community, Mrs. Mahon and three 12<sup>th</sup> grade students spoke at a community breakfast on February 20, 2020 at Chip’s Restaurant. The topic was on what it is like to be an Amity Regional High School student and how Amity has helped prepare these students to become contributing members of society. About two dozen community members attended the breakfast.



AMSB Canstruction Contest – AMSB collected over 1300 items for the Woodbridge Food Bank!



## Amity Regional School District No. 5

### Technology Department Monthly Report

#### **Completed Projects:**

- Received 6 bid responses for Infrastructure upgrade project
- Installed and tested possible Wi-Fi management solution called Wyebot, free demo unit on loan helped us gather data on current baseline capabilities
- New Promethean boards have been staged for installation in Special Education classrooms in the Orange and Bethany Middle Schools
- Planning professional development for new users of Promethean boards using a “train the trainer” model
- Deployed test pilot of Aristotle software for I:1 devices that could help us combine two current products into a single, more cost effective solution
- Received initial quote on possible replacement for existing visitor management system
- Replaced failed hard drive in a storage network node, all current SANs are now back to full operational capacity

#### **Projects in process:**

- Participating in the Preliminary Design Committee for stadium renovations
- Gathering data on deployed I:1 device management and filtering service (Aristotle).
- Working on implementing a demo for new visitor management system, current self-serve kiosk system is end of life and longer fits with the District’s visitor security model
- Testing and gathering data through a “proof of concept” deployment of possible new wireless infrastructure.
- Writing RFP for I:1 devices for next year’s 9th and 10th grade students
- Writing RFP for Teacher Devices to support I:1 initiative in the HS

#### **Outstanding issues to be addressed:**

- Storage Area Network (SANs) appliances are end-of-life and beginning to fail
- Investigating solutions for the PA sound system in the presentation room for Board of Ed meetings as well as identifying possible new locations for future BoE meetings starting next year

Amity Regional School  
District No. 5

25 Newton Road

Woodbridge, CT 06525

Phone: 203-397-4817

Fax: 203-397-4864





CLEAN

SAFE

HEALTHY

SCHOOLS

Amity Regional School  
District No. 5

25 Newton Road

Woodbridge, CT 06525

Phone: 203-397-4817

Fax: 203-397-4864



## Amity Regional School District No. 5

### Facilities Department Monthly Report

#### **Completed Projects:**

- The replacement of the air handler in the custodial area at Amity Regional High School has been completed. All facets of work are done and it is operating properly.
- The cabinetry and plumbing was removed from the Senior Lounge at Amity Regional High School. This is to facilitate the redesign of the room by students.
- The door to the walk-in cooler in the kitchen at Amity Middle School, Bethany Campus, had warped and become leaky. The internal door heaters had also failed. A new door was ordered and installed by our contractor.
- Both large acid neutralization tanks at Amity Regional High School were serviced during the February break. The old limestone was vacuumed out, the tanks were pressure washed, and new limestone media was put in. As a preventive measure, this is done every two years.
- All required code inspections were conducted during the February break.
- During a preventive maintenance visit, our vendor noticed the check valves on the septic tank system at Amity Middle School, Orange Campus, were sticking. The valves were rebuilt by our vendor.
- The honey bee enclosure at Amity Regional High School was relocated from the rooftop location to a prepared area by the grounds garage. All work was done by in-house personnel.
- The field house at Amity Regional High School had its winter cleaning. Floors were repainted as were the walls to prepare for the new athletic seasons.

#### **Projects in process:**

- The newest student-led project of construction of two storage buildings across from the loading dock at Amity Regional High School has commenced. The first building's foundation, floor, roof, walls and partial siding have been installed to date. The roll-up door was also installed. Construction of sections of the second shed has begun.
- Engineering and design has commenced for the Athletic Fields projects at Amity Regional High School.
- It was requested to add a second actor preparation area in the Green Room of the auditorium at Amity Regional High School. Our in-house personnel is repurposing counters and electrical power bars from other locations to accomplish this work.

#### **Outstanding issues to be addressed:**

- None at this time.

**AMITY REGIONAL SCHOOL DISTRICT NO. 5**  
**Bethany Orange Woodbridge**  
**25 Newton Road, Woodbridge Connecticut 06525**



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**Theresa Lumas**  
**Director of Finance and Administration**  
[terry.lumas@amityregion5.org](mailto:terry.lumas@amityregion5.org)

**Phone (203) 397-4813**  
**Fax (203) 397-4864**

To: Dr. Jennifer Byars, Superintendent of Schools

From: Theresa Lumas, Director of Finance and Administration

Re: Award of Contract over \$35,000 or contract extensions

Date: March 3, 2020

**Finance:**

**1. Auditing Services :**

Mahoney Sabol & Company, LLP of Glastonbury, Connecticut was the successful bidder in 2017 for a three-year contract with the option of a two-year extension for professional auditing services. Their 2017 bid price was \$31,000 annually for three years. I requested a proposal for a two year extension, and Mahoney Sabol & Company, LLP has proposed a price of \$31,250 in year one and \$31,500 in year two. I recommend the Amity Finance Committee and the Amity Board of Education award a two-year contract for professional auditing services to Mahoney Sabol & Company, LLP of Glastonbury, Connecticut.

***Motions:***

**Amity Finance Committee:**

***Move to recommend the Amity Board of Education award–***

**Amity Board of Education:**

***Move to award –***

***.... the Professional Auditing Services to Mahoney Sabol & Company, LLP of Glastonbury, Connecticut at the proposed price of \$31,250 for July 1, 2020 to June 30, 2021 and \$31,500 for July 1, 2021 to June 30, 2022. The Board reserves the right to cancel the contract if Mahoney Sabol & Company, LLP. fails to perform in a satisfactory manner, as determined by the Superintendent of Schools.***

**2. Investment Consultants:**

Fiduciary Investment Advisors (FIA) of Windsor, Connecticut was the successful bidder in 2017 for a three-year contract with the option of a two-year extension for investment consulting services. Their 2017 bid price was \$19,000 annually for three years. I requested a proposal for a two-year extension, and FIA has offered to keep their current price of \$19,000 in each of the next two years. I recommend the Amity Finance Committee and the Amity Board of Education award a two-year contract for investment consulting services to Fiduciary Investment Advisors, LLC of Windsor, Connecticut.

***Motions:***

**Amity Finance Committee:**

***Move to recommend the Amity Board of Education award–***

**Amity Board of Education:**

***Move to award –***

***.... the Investment Services Consulting to Fiduciary Investment Advisors, LLC, of Windsor, Connecticut at the proposed price of \$19,000 for July 1, 2020 to June 30, 2021 and July 1, 2021 to June 30, 2022. The Board reserves the right to cancel the contract if FIA, LLC. fails to perform in a satisfactory manner, as determined by the Superintendent of Schools.***

**3. Health Insurance Consultants:**

Understand, Service, Innovate, (USI) of Meriden, Connecticut was the successful bidder in 2017 for a three-year contract with the option of a two-year extension for health and welfare benefits consulting. Their 2017 bid prices were \$29,000 for year 1, \$29,000 for year 2, and \$31,500 for year 3. I requested a proposal for a two-year extension, and USI has offered to keep their current price of \$31,500 in each of the next two years. I recommend the Amity Finance Committee and the Amity Board of Education award a two-year contract for health and welfare benefits consultant for medical and dental insurance to USI, Insurance Services, LLC of Meriden, Connecticut.

***Motions:***

**Amity Finance Committee:**

***Move to recommend the Amity Board of Education award–***

**Amity Board of Education:**

***Move to award –***

***.... the Health and Welfare Benefits Consultant to, USI Insurance Services, LLC, of Meriden, Connecticut at the proposed price of \$31,500 for July 1, 2020 to June 30, 2021 and July 1, 2021 to June 30, 2022. The Board reserves the right to cancel the contract if USI Insurance Services, LLC. fails to perform in a satisfactory manner, as determined by the Superintendent of Schools.***

**AMITY REGIONAL SCHOOL DISTRICT NO. 5**  
**REVENUES AND EXPENDITURES**  
**FOR FY 2019-2020**

		<b>COLUMN 1</b>	<b>COLUMN 2</b>	<b>COLUMN 3</b>	<b>COLUMN 4</b>	<b>COLUMN 5</b>	<b>COLUMN 6</b>	<b>COL 7</b>
		<b>2018-2019</b>	<b>2019-2020</b>	<b>JAN 2020</b>	<b>CHANGE</b>	<b>FEB 2020</b>	<b>VARIANCE</b>	<b>FAV</b>
<b>LINE</b>	<b>CATEGORY</b>	<b>ACTUAL</b>	<b>BUDGET</b>	<b>FORECAST</b>	<b>INCR./ (DECR.)</b>	<b>FORECAST</b>	<b>OVER/(UNDER)</b>	<b>UNF</b>
1	MEMBER TOWN ALLOCATIONS	48,190,256	48,627,967	48,627,967	0	48,627,967	0	FAV
2	OTHER REVENUE	324,088	248,577	276,978	(1,224)	275,754	27,177	FAV
3	OTHER STATE GRANTS	798,102	592,878	422,808	301,283	724,091	131,213	FAV
4	MISCELLANEOUS INCOME	92,101	78,885	72,885	(5,875)	67,010	(11,875)	UNF
5	BUILDING RENOVATION GRANTS	0	0	0	0	0	0	FAV
6	<b>TOTAL REVENUES</b>	<b>49,404,547</b>	<b>49,548,307</b>	<b>49,400,638</b>	<b>294,184</b>	<b>49,694,822</b>	<b>146,515</b>	<b>FAV</b>
7	SALARIES	25,483,077	26,655,424	26,593,035	(36,972)	26,556,063	(99,361)	FAV
8	BENEFITS	5,641,173	5,980,496	6,021,008	(11,769)	6,009,239	28,743	UNF
9	PURCHASED SERVICES	7,863,484	8,497,804	7,977,473	(8,875)	7,968,598	(529,206)	FAV
10	DEBT SERVICE	4,567,838	4,559,210	4,559,210	0	4,559,210	0	FAV
11	SUPPLIES (INCLUDING UTILITIES)	3,050,834	2,973,028	3,035,812	0	3,035,812	62,784	UNF
12	EQUIPMENT	272,162	250,547	250,547	0	250,547	0	FAV
13	IMPROVEMENTS / CONTINGENCY	365,447	464,000	377,159	(9,000)	368,159	(95,841)	FAV
14	DUES AND FEES	127,505	167,798	167,798	0	167,798	0	FAV
15	TRANSFER ACCOUNT	0	0	0	0	0	0	FAV
16	<b>TOTAL EXPENDITURES</b>	<b>47,371,520</b>	<b>49,548,307</b>	<b>48,982,042</b>	<b>(66,616)</b>	<b>48,915,426</b>	<b>(632,881)</b>	<b>FAV</b>
17	<b>SUBTOTAL</b>	<b>2,033,027</b>	<b>0</b>	<b>418,596</b>	<b>360,800</b>	<b>779,396</b>	<b>779,396</b>	<b>FAV</b>
18	PLUS: CANCELLATION OF PRIOR YEAR'S ENCUMBRANCES	<b>166,245</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>FAV</b>
19	DESIGNATED FOR SUBSEQUENT YEAR'S BUDGET:	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>FAV</b>
20	<b>NET BALANCE / (DEFICIT)</b>	<b>2,199,272</b>	<b>0</b>	<b>418,596</b>	<b>360,800</b>	<b>779,396</b>	<b>779,396</b>	<b>FAV</b>

Column 7: FAV=Favorable Variance  
Revenues: At or OVER budget  
Expenditures: At or UNDER budget

**AMITY REGIONAL SCHOOL DISTRICT NO. 5**  
**REVENUES AND EXPENDITURES**  
**FOR FY 2019-2020**

		<b>COLUMN 1</b>	<b>COLUMN 2</b>	<b>COLUMN 3</b>	<b>COLUMN 4</b>	<b>COLUMN 5</b>	<b>COLUMN 6</b>	<b>COL 7</b>
		<b>2018-2019</b>	<b>2019-2020</b>	<b>JAN 2020</b>	<b>CHANGE</b>	<b>FEB 2020</b>	<b>VARIANCE</b>	<b>FAV</b>
<b>LINE</b>	<b>CATEGORY</b>	<b>ACTUAL</b>	<b>BUDGET</b>	<b>FORECAST</b>	<b>INCR./ (DECR.)</b>	<b>FORECAST</b>	<b>OVER/ (UNDER)</b>	<b>UNF</b>
1	BETHANY ALLOCATION	9,295,901	8,926,150	8,926,150	0	8,926,150	0	FAV
2	ORANGE ALLOCATION	24,181,870	24,736,074	24,736,074	0	24,736,074	0	FAV
3	WOODBIDGE ALLOCATION	14,712,485	14,965,743	14,965,743	0	14,965,743	0	FAV
4	<b>MEMBER TOWN ALLOCATIONS</b>	<b>48,190,256</b>	<b>48,627,967</b>	<b>48,627,967</b>	<b>0</b>	<b>48,627,967</b>	<b>0</b>	<b>FAV</b>
5	ADULT EDUCATION	3,626	3,042	3,042	0	3,042	0	FAV
6	PARKING INCOME	35,969	29,000	29,000	0	29,000	0	FAV
7	INVESTMENT INCOME	130,966	75,000	60,000	0	60,000	(15,000)	UNF
8	ATHLETICS	18,375	25,000	25,000	(2,000)	23,000	(2,000)	UNF
9	TUITION REVENUE	108,642	90,535	133,936	0	133,936	43,401	FAV
10	TRANSPORTATION INCOME	26,510	26,000	26,000	776	26,776	776	FAV
11	TRANSPORTATION BOWA AGREEMENT	0	0	0	0	0	0	FAV
12	<b>OTHER REVENUE</b>	<b>324,088</b>	<b>248,577</b>	<b>276,978</b>	<b>(1,224)</b>	<b>275,754</b>	<b>27,177</b>	<b>FAV</b>
13	OTHER STATE GRANT	0	0	0	0	0	0	FAV
14	SPECIAL EDUCATION GRANTS	798,102	592,878	422,808	301,283	724,091	131,213	FAV
15	<b>OTHER STATE GRANTS</b>	<b>798,102</b>	<b>592,878</b>	<b>422,808</b>	<b>301,283</b>	<b>724,091</b>	<b>131,213</b>	<b>FAV</b>
16	RENTAL INCOME	12,850	21,000	15,000	0	15,000	(6,000)	UNF
17	INTERGOVERNMENTAL REVENUE	29,572	32,885	32,885	0	32,885	0	FAV
18	OTHER REVENUE	49,679	25,000	25,000	(5,875)	19,125	(5,875)	UNF
19	TRANSFER IN	0	0	0	0	0	0	FAV
20	<b>MISCELLANEOUS INCOME</b>	<b>92,101</b>	<b>78,885</b>	<b>72,885</b>	<b>(5,875)</b>	<b>67,010</b>	<b>(11,875)</b>	<b>UNF</b>
21	<b>BUILDING RENOVATION GRANTS</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>FAV</b>
22	<b>TOTAL REVENUES</b>	<b>49,404,547</b>	<b>49,548,307</b>	<b>49,400,638</b>	<b>294,184</b>	<b>49,694,822</b>	<b>146,515</b>	<b>FAV</b>

Column 7: FAV=Favorable Variance  
Revenues: At or OVER budget  
Expenditures: At or UNDER budget

**AMITY REGIONAL SCHOOL DISTRICT NO. 5**  
**REVENUES AND EXPENDITURES**  
**FOR FY 2019-2020**

		<b>COLUMN 1</b>	<b>COLUMN 2</b>	<b>COLUMN 3</b>	<b>COLUMN 4</b>	<b>COLUMN 5</b>	<b>COLUMN 6</b>	<b>COL 7</b>
		<b>2018-2019</b>	<b>2019-2020</b>	<b>JAN 2020</b>	<b>CHANGE</b>	<b>FEB 2020</b>	<b>VARIANCE</b>	<b>FAV</b>
<b>LINE</b>	<b>CATEGORY</b>	<b>ACTUAL</b>	<b>BUDGET</b>	<b>FORECAST</b>	<b>INCR./((DECR.)</b>	<b>FORECAST</b>	<b>OVER/(UNDER)</b>	<b>UNF</b>
1	5111-CERTIFIED SALARIES	20,936,740	21,776,498	21,717,631	(28,802)	21,688,829	(87,669)	FAV
2	5112-CLASSIFIED SALARIES	4,546,337	4,878,926	4,875,404	(8,170)	4,867,234	(11,692)	FAV
3	<b>SALARIES</b>	<b>25,483,077</b>	<b>26,655,424</b>	<b>26,593,035</b>	<b>(36,972)</b>	<b>26,556,063</b>	<b>(99,361)</b>	<b>FAV</b>
4	5200-MEDICARE - ER	345,833	364,933	383,587	0	383,587	18,654	UNF
5	5210-FICA - ER	281,164	287,766	305,431	0	305,431	17,665	UNF
6	5220-WORKERS' COMPENSATION	226,473	237,774	216,280	(11,769)	204,511	(33,263)	FAV
7	5255-MEDICAL & DENTAL INSURANCE	3,696,434	4,060,498	4,060,498	0	4,060,498	0	FAV
8	5860-OPEB TRUST	62,910	40,950	40,950	0	40,950	0	FAV
9	5260-LIFE INSURANCE	41,677	44,579	43,328	0	43,328	(1,251)	FAV
10	5275-DISABILITY INSURANCE	9,501	10,222	10,421	0	10,421	199	UNF
11	5280-PENSION PLAN - CLASSIFIED	892,845	851,987	851,987	0	851,987	0	FAV
12	5281- DEFINED CONTRIBUTION RETIREMENT PLAN	70,117	69,787	96,525	0	96,525	26,738	UNF
12	5282-RETIREMENT SICK LEAVE - CERT	1,921	0	0	0	0	0	FAV
13	5283-RETIREMENT SICK LEAVE - CLASS	1,000	0	0	0	0	0	FAV
14	5284-SEVERANCE PAY - CERTIFIED	1,000	0	0	0	0	0	FAV
15	5290-UNEMPLOYMENT COMPENSATION	9,110	10,000	10,000	0	10,000	0	FAV
16	5291-CLOTHING ALLOWANCE	1,188	2,000	2,000	0	2,000	0	FAV
17	<b>BENEFITS</b>	<b>5,641,173</b>	<b>5,980,496</b>	<b>6,021,008</b>	<b>(11,769)</b>	<b>6,009,239</b>	<b>28,743</b>	<b>UNF</b>
18	5322-INSTRUCTIONAL PROG IMPROVEMENT	18,005	39,700	19,700	0	19,700	(20,000)	FAV
19	5327-DATA PROCESSING	90,178	95,276	95,276	0	95,276	0	FAV
20	5330-OTHER PROFESSIONAL & TECHNICAL SRVC	1,297,214	1,467,869	1,539,699	9,000	1,548,699	80,830	UNF
21	5440-RENTALS - LAND, BLDG, EQUIPMENT	80,176	118,750	118,750	0	118,750	0	FAV
22	5510-PUPIL TRANSPORTATION	2,864,785	3,100,537	3,147,514	(39,220)	3,108,294	7,757	UNF
23	5521-GENERAL LIABILITY INSURANCE	232,530	243,217	239,163	0	239,163	(4,054)	FAV
24	5550-COMMUNICATIONS: TEL, POST, ETC.	130,974	115,356	109,876	0	109,876	(5,480)	FAV
25	5560-TUITION EXPENSE	3,072,286	3,213,232	2,603,628	21,345	2,624,973	(588,259)	FAV
26	5590-OTHER PURCHASED SERVICES	77,336	103,867	103,867	0	103,867	0	FAV
27	<b>PURCHASED SERVICES</b>	<b>7,863,484</b>	<b>8,497,804</b>	<b>7,977,473</b>	<b>(8,875)</b>	<b>7,968,598</b>	<b>(529,206)</b>	<b>FAV</b>

Column 7: FAV=Favorable Variance  
Revenues: At or OVER budget  
Expenditures: At or UNDER budget

**AMITY REGIONAL SCHOOL DISTRICT NO. 5**  
**REVENUES AND EXPENDITURES**  
**FOR FY 2019-2020**

		<b>COLUMN 1</b>	<b>COLUMN 2</b>	<b>COLUMN 3</b>	<b>COLUMN 4</b>	<b>COLUMN 5</b>	<b>COLUMN 6</b>	<b>COL 7</b>
		<b>2018-2019</b>	<b>2019-2020</b>	<b>JAN 2020</b>	<b>CHANGE</b>	<b>FEB 2020</b>	<b>VARIANCE</b>	<b>FAV</b>
<b>LINE</b>	<b>CATEGORY</b>	<b>ACTUAL</b>	<b>BUDGET</b>	<b>FORECAST</b>	<b>INCR./((DECR.))</b>	<b>FORECAST</b>	<b>OVER/(UNDER)</b>	<b>UNF</b>
28	5830-INTEREST	717,838	809,210	809,210	0	809,210	0	FAV
29	5910-REDEMPTION OF PRINCIPAL	3,850,000	3,750,000	3,750,000	0	3,750,000	0	FAV
30	<b>DEBT SERVICE</b>	<b>4,567,838</b>	<b>4,559,210</b>	<b>4,559,210</b>	<b>0</b>	<b>4,559,210</b>	<b>0</b>	<b>FAV</b>
31	5410-UTILITIES, EXCLUDING HEAT	667,107	696,046	663,399	0	663,399	(32,647)	FAV
32	5420-REPAIRS, MAINTENANCE & CLEANING	837,744	752,384	819,225	0	819,225	66,841	UNF
33	5611-INSTRUCTIONAL SUPPLIES	358,160	382,393	382,393	0	382,393	0	FAV
34	5613-MAINTENANCE/CUSTODIAL SUPPLIES	212,558	229,057	229,057	0	229,057	0	FAV
35	5620-OIL USED FOR HEATING	53,664	42,700	42,700	0	42,700	0	FAV
36	5621-NATURAL GAS	70,333	65,206	55,206	0	55,206	(10,000)	FAV
37	5627-TRANSPORTATION SUPPLIES	110,671	122,400	122,400	0	122,400	0	FAV
38	5641-TEXTS & DIGITAL RESOURCES	170,997	162,147	200,737	0	200,737	38,590	UNF
39	5642-LIBRARY BOOKS & PERIODICALS	22,067	21,615	21,615	0	21,615	0	FAV
40	5690-OTHER SUPPLIES	547,533	499,080	499,080	0	499,080	0	FAV
41	<b>SUPPLIES (INCLUDING UTILITIES)</b>	<b>3,050,834</b>	<b>2,973,028</b>	<b>3,035,812</b>	<b>0</b>	<b>3,035,812</b>	<b>62,784</b>	<b>UNF</b>
42	5730-EQUIPMENT - NEW	65,980	128,582	128,582	0	128,582	0	FAV
43	5731-EQUIPMENT - REPLACEMENT	206,182	121,965	121,965	0	121,965	0	FAV
44	<b>EQUIPMENT</b>	<b>272,162</b>	<b>250,547</b>	<b>250,547</b>	<b>0</b>	<b>250,547</b>	<b>0</b>	<b>FAV</b>
45	5715-IMPROVEMENTS TO BUILDING	350,884	133,000	128,900	0	128,900	(4,100)	FAV
45a	5715-FACILITIES CONTINGENCY	100,000	100,000	100,000	0	100,000	0	FAV
45b	TRSF. FROM FACILITIES CONTINGENCY	(100,000)	0	(55,741)	(9,000)	(64,741)	(64,741)	FAV
46	5720-IMPROVEMENTS TO SITES	14,563	81,000	74,000	0	74,000	(7,000)	FAV
47	5850-DISTRICT CONTINGENCY	150,000	150,000	150,000	0	150,000	0	FAV
47a	TRSF. FROM CONTINGENCY TO OTHER ACCTS.	(150,000)	0	(20,000)	0	(20,000)	(20,000)	FAV
48	<b>IMPROVEMENTS / CONTINGENCY</b>	<b>365,447</b>	<b>464,000</b>	<b>377,159</b>	<b>(9,000)</b>	<b>368,159</b>	<b>(95,841)</b>	<b>FAV</b>
49	5580-STAFF TRAVEL	15,571	25,350	25,350	0	25,350	0	FAV
50	5581-TRAVEL - CONFERENCES	26,235	37,445	37,445	0	37,445	0	FAV
51	5810-DUES & FEES	85,699	105,003	105,003	0	105,003	0	FAV
52	<b>DUES AND FEES</b>	<b>127,505</b>	<b>167,798</b>	<b>167,798</b>	<b>0</b>	<b>167,798</b>	<b>0</b>	<b>FAV</b>
53	<b>5856-TRANSFER ACCOUNT</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>FAV</b>
54	<b>ESTIMATED UNSPENT BUDGETS</b>		<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>FAV</b>
55	<b>TOTAL EXPENDITURES</b>	<b>47,371,520</b>	<b>49,548,307</b>	<b>48,982,042</b>	<b>(66,616)</b>	<b>48,915,426</b>	<b>(632,881)</b>	<b>FAV</b>

Column 7: FAV=Favorable Variance  
Revenues: At or OVER budget  
Expenditures: At or UNDER budget

**AMITY REGIONAL SCHOOL DISTRICT NO. 5  
REVENUES & EXPENDITURES BY CATEGORY  
FINANCIAL ANALYSIS  
FOR THE FISCAL YEAR 2019-2020**



**FEB 2020**

**2019-2020 FORECAST**

**OVERVIEW**

The projected unspent fund balance for this fiscal year is **\$779,396 FAV**, *previously \$418,596 FAV*, which appears on page 1, column 6, line 20.

**REVENUES BY CATEGORY**

The projected yearend balance of revenues is **\$146,515 FAV**, *previously \$147,669 UNF*, which appears on page 2, column 6, line 22.

**LINE 5 on Page 2: ADULT EDUCATION:**

The forecast is based on projected State payments budgeted.

**LINE 6 on Page 2: PARKING INCOME:**

The forecast is based on budget.

**LINE 7 on Page 2: INVESTMENT INCOME:**

The budget is based on the expectation interest rates will remain steady and revenue will be as budgeted. *The forecast projects less interest income due to declining interest rates, \$15,000 UNF.*

<b><u>Month</u></b>	<b><u>Peoples United</u></b>	<b><u>State Treasurer's Investment Fund</u></b>
July 2019	0.393%	2.35%
August	0.395%	2.16%
September	0.397%	1.98%
October	0.390%	1.97%
November	0.397%	1.76%
December	0.395%	1.73%
January	0.390%	1.75%
February	0.390%	1.65%

**LINE 8 on Page 2: ATHLETICS:**

*The forecast is based on \$2,000 UNF underbudget.*



**LINE 9 on Page 2: TUITION REVENUE:**

The budget is based on five tuition students. The actual tuition charged is higher than budgeted since the rate is set after the budget referendum is past. Four new tuition students enrolled in the District, including the child of a staff member at a reduced rate. The projected variance is **\$43,401 FAV** previously \$43,401 FAV as one tuition student did not enroll during September.

**LINE 10 on Page 2: TRANSPORTATION INCOME:**

The forecast is based on projected State payments for magnet school transportation budgeted.

**LINE 14 on Page 2: SPECIAL EDUCATION GRANTS:**

The current projection is based on budgeted costs for placements and transportation. This is based on a 73% reimbursement rate. *The forecast reflects estimated revenue based on the March SEDAC-G report, less high cost reimbursements projected to be \$131,213 FAV. The changes in special education tuition expenses are based on current student services resulting in the increased revenue.*

**LINE 16 on Page 2: RENTAL INCOME:**

The forecast is projecting to be under budget based on actual year-to-date rental requests and last year's actual, **\$6,000 UNF**.

**LINE 17 on Page 2: INTERGOVERNMENTAL INCOME:**

The forecast is based on the budget for shared services agreement with the Town of Woodbridge and the Woodbridge Board of Education for technology services.

**LINE 18 on Page 2: OTHER REVENUE:**

The forecast is based on actual and expected to be under budget, **\$5,875 UNF**.

**EXPENDITURES BY CATEGORY**

The projected yearend balance of expenditures is **\$632,881 FAV, previously, \$566,265 FAV** which appears on page 4, column 6, line 55.

**LINE 1 on Page 3: 5111-CERTIFIED SALARIES:**

The forecast is based on budget. There are still open positions and the forecast will be updated after the school year begins. *The current projection is for \$87,669 FAV previously \$58,867 FAV due to staff changes.*

**LINE 2 on Page 3: 5112-CLASSIFIED SALARIES:**

The forecast is based on budget. There are still open positions and the forecast will be updated after the school year begins. *The current projection shows \$11,692 FAV previously \$3,522 FAV due to staff changes, a number of unanticipated retirements submitted at the start of the fiscal year and vacancies during transitions and updated overtime costs.*

**LINES 4 & 5 on Page 3: 5200 & 5210-MEDICARE & FICA:**

The forecast is based on the budget for current staff. *Medicare taxes are projected to be \$18,654 UNF and FICA is projected to be \$17,665 UNF.*

**LINE 6: 5220 on Page 3-WORKERS' COMPENSATION:**

The workers' compensation premium is as budgeted and the forecast assumes the payroll audit will be as budgeted. Member equity distribution was received for **\$21,494 FAV** and a payroll audit rebate of \$6,769 FAV received in February, compared to a budgeted cost of \$5,000. Total savings YTD \$33,263 FAV.

**LINES 7 on Page 3: 5255-MEDICAL AND DENTAL INSURANCE:**

The forecast assumes actual claims of current employees and retirees will be the same as the budget. The projected monthly budget is based on an average of five years of claims.

**CLAIMS OF CURRENT EMPLOYEES AND RETIREES**

MONTH	2019-2020 ACTUAL	2019-2020 BUDGET	VARIANCE	2018-2019 ACTUAL	2017-2018 ACTUAL
JUL	\$ 366,182	\$ 358,094	\$ 8,088	\$ 292,718	\$ 254,849
AUG	\$ 383,765	\$ 395,099	\$ (11,334)	\$ 282,192	\$ 374,433
SEP	\$ 317,685	\$ 323,626	\$ (5,941)	\$ 376,576	\$ 219,176
OCT	\$ 383,369	\$ 326,479	\$ 56,890	\$ 245,938	\$ 271,340
NOV	\$ 370,672	\$ 402,013	\$ (31,341)	\$ 418,110	\$ 353,747
DEC	\$ 403,126	\$ 443,211	\$ (40,085)	\$ 334,678	\$ 318,839
JAN	\$ 348,820	\$ 307,554	\$ 41,266	\$ 331,129	\$ 191,730
FEB	\$ 124,317	\$ 325,589	\$ (201,271)	\$ 384,149	\$ 172,313
MAR	\$ 351,628	\$ 351,628	\$ -	\$ 363,660	\$ 288,923
APR	\$ 335,660	\$ 335,660	\$ -	\$ 278,082	\$ 213,346
MAY	\$ 408,891	\$ 408,891	\$ -	\$ 363,382	\$ 343,550
JUN	\$ 316,608	\$ 316,608	\$ -	\$ 224,419	\$ 253,461
TOTALS	\$ 4,110,723	\$ 4,294,451	\$ (183,728)	\$ 3,895,033	\$3,255,706

**ACTUAL/FORECAST CLAIMS AS A PERCENTAGE OF EXPECTED CLAIMS**

2015-2016 ACTUAL	2016-2017 ACTUAL	2017-2018 ACTUAL	2018-2019 ACTUAL	2019-2020 FORECAST
99.9%	85.2%	72.1%	92.2%	95.7%

**Note:** 2019-2020 FORECAST of projected claims for this fiscal year as a percentage of expected claims is based on actual year-to-date claims plus budgeted claims for the remainder of the year divided by expected (budgeted) claims.

**FEES OF CURRENT EMPLOYEES AND RETIREES**  
**(Stop-Loss Premiums, Network Access Fees, and Other Fees)**

<b>MONTH</b>	<b>2019-2020 ACTUAL</b>	<b>2019-2020 BUDGET</b>	<b>VARIANCE</b>	<b>2018-2019 ACTUAL</b>	<b>2017- 2018 ACTUAL</b>
<i><b>JUL</b></i>	\$ 65,692	\$ 78,882	\$ (13,190)	\$ 63,793	\$ 84,939
<i><b>AUG</b></i>	\$ 62,661	\$ 83,717	\$ (21,056)	\$ 60,070	\$ 96,820
<i><b>SEP</b></i>	\$ 46,307	\$ 73,957	\$ (27,650)	\$ 63,599	\$ 73,886
<i><b>OCT</b></i>	\$ 70,245	\$ 77,716	\$ (7,471)	\$ 63,213	\$ 85,237
<i><b>NOV</b></i>	\$ 59,406	\$ 52,886	\$ 6,520	\$ 71,815	\$ 58,958
<i><b>DEC</b></i>	\$ 62,365	\$ 47,488	\$ 14,877	\$ 70,016	\$ 45,657
<i><b>JAN</b></i>	\$ 73,157	\$ 46,861	\$ 26,296	\$ 78,786	\$ 45,850
<i><b>FEB</b></i>	\$ 57,592	\$ 46,138	\$ 11,453	\$ 66,033	\$ 45,666
<i><b>MAR</b></i>	\$ 40,994	\$ 40,994	\$ -	\$ 38,918	\$ 45,850
<i><b>APR</b></i>	\$ 46,953	\$ 46,953	\$ -	\$ 69,321	\$ 46,217
<i><b>MAY</b></i>	\$ 46,271	\$ 46,271	\$ -	\$ 76,505	\$ 46,034
<i><b>JUN</b></i>	\$ 45,507	\$ 45,507	\$ -	\$ 72,044	\$ 46,401
<b>TOTALS</b>	<b>\$ 677,149</b>	<b>\$ 687,370</b>	<b>\$ (10,221)</b>	<b>\$ 794,113</b>	<b>\$ 721,515</b>

**LINE 9 on Page 3: 5260-LIFE INSURANCE:**

The forecast is based on the current staff.

**LINE 10 on Page 3: 5275-DISABILITY INSURANCE:**

The forecast is based on the current staff.

**LINE 12 on Page 3: 5281-DEFINED CONTRIBUTION RETIREMENT PLAN:**

Based on last year's expenditures this account is expected to be over budget. The current forecast projects this account will be \$26,738 UNF previously \$26,738 UNF overbudget due to changes in staffing.

**LINE 22 on Page 3: 5510-PUPIL TRANSPORTATION:**

*Special Education Transportation is projecting a negative balance of \$7,757 UNF, previously, \$46,977 UNF.* The forecast is based on the current transportation needs of the students.

**LINE 23 on Page 3: 5521-GENERAL LIABILITY INSURANCE:** Student Accident insurance renewed at a flat rate, saving \$4,054 FAV.

**LINE 24 on Page 3: 5550-COMMUNICATION:TEL, POST, ETC:**

E-Rate funding was approved for the current fiscal year. The District is receiving discounted invoices for the CEN service provided by the State of Connecticut - \$15,480 FAV. The forecast includes an estimate of \$10,000 UNF to cover the cost of a bond referendum for all 3 towns. Only the District's cost was budgeted. \$5,480 FAV, previously \$15,480 FAV.

**LINE 25 on Page 3: 5560-TUITION EXPENSE:**

*Tuition is currently forecasted to have a \$588,259 FAV previously, \$609,604 FAV variance.* The forecast is based on current students and their placements and will change throughout the year.

Tuition for the vo-ag schools has a projected variance of **\$49,027 FAV, previously \$49,027 FAV.**

	<b>FY15-16 ACTUAL</b>	<b>FY16-17 ACTUAL</b>	<b>FY17-18 ACTUAL</b>	<b>FY18-19 ACTUAL</b>	<b>FY19-20 BUDGET</b>	<b>FY19-20 FORECAST</b>
Sound	4	3	4	6	7	<b>6 (6)</b>
Trumbull	3	3	6	4	4	<b>4</b>
Nonnewaug	<b>3(5) <sup>a</sup></b>	3	4	6	4	<b>5(5)</b>
Common Ground Charter HS	1	1	0	0	0	<b>0</b>
ACES Wintergreen Magnet	0	0	0	0	0	<b>0</b>
King Robinson Magnet	1	1	0	0	0	<b>0</b>
Engineering Science Magnet	0	0	1	0	0	<b>0</b>
Highville Charter School	0	0	1	0	0	<b>0</b>
<b>Totals</b>	<b>12(14)</b>	<b>11</b>	<b>16</b>	<b>16</b>	<b>15</b>	<b>15(15)</b>

Note <sup>a</sup>: Two students left on April 15, 2016.

ECA is projected variance *to be on budget, previously on budget* due to a change in enrollment.

	<b>FY15-16 ACTUAL</b>	<b>FY16-17 ACTUAL</b>	<b>FY17-18 ACTUAL</b>	<b>FY18-19 ACTUAL</b>	<b>FY19-20 BUDGET</b>	<b>FY19-20 FORECAST</b>
<b>ECA</b>	<b>22</b>	<b>15</b>	<b>19</b>	<b>24</b>	<b>20</b>	<b>20(20)</b>

*Public (ACES) and private out-of-district placements are currently less than anticipated, \$539,232 FAV previously \$560,577 FAV but typically there are many changes during the year.*

	<b>FY15-16 ACTUAL</b>	<b>FY16-17 ACTUAL</b>	<b>FY17-18 ACTUAL</b>	<b>FY18-19 ACTUAL</b>	<b>FY19-20 BUDGET</b>	<b>FY19-20 FORECAST</b>
Public SPED	6	8	8	11	9	<b>7 (7)</b>

Private SPED	26	27	20	22	24	<b>18 (19)</b>
Totals	32	35	28	33	33	<b>25(26)</b>

**LINE 31 on Page 4: 5410-UTILITIES, EXCLUDING HEAT:**

The 2019-2020 budget for electricity assumes the use of 3,396,770 kilowatt hours at an average price of \$0.1834 per kilowatt hour, or a cost of \$622,967. ***Current forecast projects a savings of \$29,000 FAV.***

**ELECTRICITY (KILOWATT HOURS)**

<b>MONTH</b>	<b>2019-2020 FORECAST</b>	<b>2019-2020 BUDGET</b>	<b>VARIANCE</b>	<b>2018-2019 ACTUAL</b>	<b>2017-2018 ACTUAL</b>
<b><i>JUL</i></b>	<b><i>306,744</i></b>	269,018	<b><i>37,726</i></b>	104,580	259,046
<b><i>AUG</i></b>	<b><i>298,187</i></b>	304,346	<b><i>(6,159)</i></b>	152,275	286,777
<b><i>SEP</i></b>	<b><i>255,198</i></b>	332,452	<b><i>(77,254)</i></b>	314,178	285,740
<b><i>OCT</i></b>	<b><i>294,827</i></b>	286,440	<b><i>8,387</i></b>	271,919	280,876
<b><i>NOV</i></b>	<b><i>243,754</i></b>	273,758	<b><i>(30,004)</i></b>	249,759	259,631
<b><i>DEC</i></b>	<b><i>250,944</i></b>	273,807	<b><i>(22,863)</i></b>	247,237	272,198
<b><i>JAN</i></b>	<b><i>266,227</i></b>	277,778	<b><i>(11,551)</i></b>	274,992	266,633
FEB	287,065	287,065	-	263,959	267,529
MAR	281,604	281,604	-	248,762	254,042
APR	279,004	279,004	-	262,037	268,701
MAY	284,892	284,892	-	276,658	226,981
JUN	246,606	246,606	-	91,898	226,863
Totals	<b><i>3,295,052</i></b>	<b><i>3,396,770</i></b>	<b><i>(101,718)</i></b>	<b><i>2,758,254</i></b>	<b><i>3,155,017</i></b>

**Note: 2019-2020 Actual Kilowatt Hours shown in bold italics.**

The budget assumes there will not be a Load Shed credit.

The budget for propane is \$2,250. The forecast is neutral.

The budget for water is \$45,829. The forecast is these charges will be as budgeted.

Sewer costs are budgeted at \$25,000. The forecast projects usage at \$21,353 or ***\$3,647 FAV previously, \$3,647 FAV*** after fuel cell credits of \$2,709 and revised quarterly charges were calculated.

**DEGREE DAYS**

There are 3,046 degree days to date compared to 2,995 last year at this time.

**LINE 32 on Page 4: 5420-REPAIRS & MAINTENANCE:**

A lift in the auto shop at Amity Regional High School failed inspection. The lift is obsolete. The cost of a new lift is \$6,241 UNF and a transfer was approved in September from the facilities contingency account. The well at Bethany Middle School developed a problem with the pressure tank. The system needs to be updated to a pump and VFD system. The plans have been approved by the State. A transfer request was approved in

October for \$49,500 to cover the replacement. Transfers totaling \$11,100 UNF were approved for Bethany and Orange Middle School as repairs are running higher than usual. Chiller repairs, tree removal, removing sludge in the boiler, and generator repairs are a few examples. ***Bills for snow removal year-to-date are \$37,950, budget is \$67,500. Forecast currently indicating budget for snow removal will be neutral.***

**LINE 35 on Page 4: 5620-OIL:**

Budget for the year is \$42,700. This is for a total of 20,000 gallons of heating oil at \$2.06 per gallon.

**LINE 36 on Page 4: 5621-NATURAL GAS:**

Budget for the year is \$65,206. The account is expected under budget ***\$10,000 FAV***, the fuel cell heat exchanger is performing properly.

**LINE 38 on Page 4: 5641-TEXTS & DIGITAL RESOURCES:**

Two transfers were approved in January to support purchasing texts for math: statistics class and science: physics classes. The text can be used now and this will offset the increase to the 2020-21 budget. ***\$38,590 UNF.***

**LINE 45a on Page 4: 5850-FACILITIES CONTINGENCY:**

The budget includes a \$100,000 contingency for unplanned, necessary facility expenditures. The forecast assumes these funds will be entirely used. A lift in the auto shop at Amity Regional High School failed inspection. The lift is obsolete. The cost of a new lift is \$6,241 UNF and a transfer was approved in September. The well at Bethany Middle School developed a problem with the pressure tank. The system needs to be updated to a pump and VFD system. The plans have been approved by the State. There was a transfer request in October for \$49,500 to cover the replacement. ***A transfer this month is requested for engineering services for the upcoming HVAC projects, \$9,000 UNF. The current balance is \$35,259 FAV.***

**LINE 47 on Page 4: 5850-CONTINGENCY:**

The budget includes a \$150,000 contingency for unplanned, necessary expenditures. The forecast assumes these funds will be entirely used. \$20,000 UNF was transferred in December to cover design work for the approved athletic facility projects. ***Current Contingency balance is \$130,000 FAV.***

## APPENDIX A

### COST SAVINGS AND EFFICIENCIES FOR FISCAL YEAR 2019-2020

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**TOTAL ANNUAL SAVINGS TO-DATE OF:     \$38,597**

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**\$11,319 Cable Advisory Grant:** One of the high school teachers, Jeremy Iverson, applied for and received a grant from Cable Advisory Grant. The grant is to be used to purchase production equipment for the film courses and production room. This reduces the amounts that would be funded through the general fund.

**\$ 2,600 Adult Education Shared Agreement:** The Director of Finance & Administration negotiated a lower rate for the mandated high school equivalency and English as a Second Language programs sponsored by Hamden Public Schools.

**\$23,250 E-Rate Credits:** The District's application for E-Rate credits is approved. The amount reflects discounted invoices for the CEN – state provided internet connection.

**\$1,428 Invoice Review** – Tracy Daigle, Facilities Coordinator, relentlessly pursued our service contract pricing for elevator service with Kone. Due to her diligence and knowledge of US Communities contract rates, she saved the District \$1,428 on recent service calls as they were billed at the incorrect rate.

There is a detailed history of the District's efforts to save dollars and operate efficiently. This information is posted on the District's website:

- Energy Savings Initiatives for the past decade  
<http://www.amityregion5.org/boe/sub-committees/finance-committee>
- District recognized CQIA Innovation Prize for Fostering a District Culture of Maximizing Cost Savings and Efficiencies  
<http://www.amityregion5.org/boe/sub-committees/finance-committee2>
- Fiscal Year 2018-2019 - \$52,451 <https://www.amityregion5.org/boe/sub-committees/finance-committee>
- Fiscal Year 2017-2018 – \$746,688 <https://www.amityregion5.org/boe/sub-committees/finance-committee>
- Fiscal Year 2016-2017 – \$595,302 <http://www.amityregion5.org/boe/sub-committees/finance-committee>
- Fiscal Year 2015-2016 – \$125,911 <http://www.amityregion5.org/boe/sub-committees/finance-committee>
- Fiscal Year 2014-2015 – \$139,721 <http://www.amityregion5.org/boe/sub-committees/finance-committee>

## APPENDIX B

### MONTHLY FORECASTS: PURPOSE, METHODOLOGY, HISTORICAL

#### **PURPOSE & METHODOLOGY:**

A forecast is a prediction or estimate of future events and trends. **It is only as good as the data available and the assumptions used.** We use current information and past history.

There are many factors, which can significantly impact expenditures, both positively and negatively (e.g., staff turnover, vacancies and leaves-of absence; medical and dental insurance claims when self-insured; special education expenditures; major facility repairs; snow removal).

To illustrate, a special education student could move into the District in mid-year and the cost impact could be over \$100,000 and/or we could have a 'bad claims year' and wipe out the Self Insurance Reserve Fund and need other funds to cover claims of current employees and retirees. If we do not have available funds to cover these and other potential shortfalls, the necessity to seek additional funding from the public would be our only option (as only the towns have a fund balance from prior years available to use in the case of an emergency).

Revenues can be most impacted by decisions made at the State level for Special Education and Transportation grants. We have seen the reimbursement rate change in mid-year.

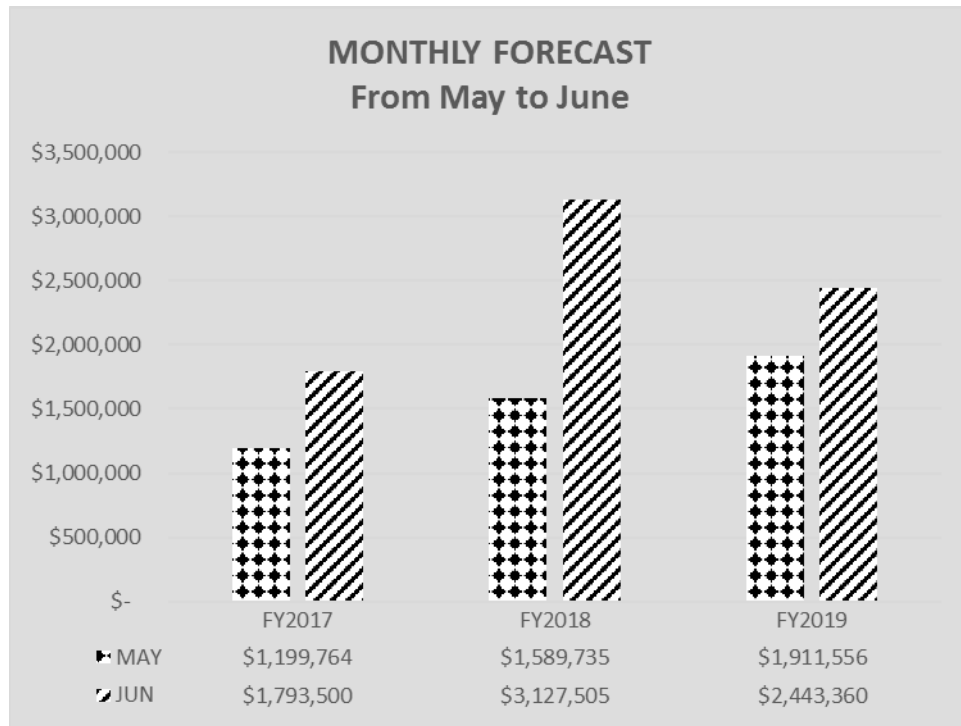
Prudent financial management is necessary. We need to be sure the total expenditures budget is never overspent (and may need to be underspent if revenues are below budget because total expenditures cannot exceed total revenues). It is imperative we 'hold back' on spending any of the Contingency Account until it is absolutely necessary or we are close to yearend. The Superintendent of Schools and Director of Finance and Administration review and approve or deny all purchase orders. We are careful to make sure funds are only spent when necessary and not just because 'it is in the budget'. We are constantly faced with the 'what-ifs' of over expenditures in certain accounts. We need to be sure there are sufficient funds available. As a result, the fund balance has been larger towards the end of the fiscal year.

Furthermore, the monthly forecasts are based on the information available. We have had large, unexpected or highly unpredictable events at the end of the fiscal year (mostly of a positive nature), which have significantly change the forecast from May to June.



## **HISTORICAL:**

The chart below depicts the yearend balance projected in May and June of each of the past three fiscal years.



The major contributors of the significant change from the May to June forecasts are detailed below.

### **FY2017:**

The audited fund balance for 2016-2017 is \$1,793,498. The monthly forecast for May projected a fund balance of \$1,199,764, which included \$345,000 for Capital Reserve. The change is \$593,736 higher than the prior month's forecast.

- **\$231,098:** Certified and classified salaries were lower than forecasted. It is not until the end of the fiscal year when we know the actual expenditures for coverages, substitutes, leaves of absences, overtime, and pay docks. We use conservative estimates in the forecasts based on past history.
- **\$129,651:** Purchased services were lower than forecasted. Athletics held fewer home contests, did not have a need for assistant coaches in a few middle school sports and cheerleading did not field a squad. Interns were fewer than budgeted.

Less than anticipated need for psychiatric consults and other consultants at PPTs. Transportation for field trips, athletics contests, and special education were lowered than expected.

- **\$76,592:** Supply accounts were under budget. These accounts include general instructional supplies, texts, library materials, transportation and maintenance supplies, and repair and maintenance accounts. Staff monitor budgets closely during the year and spend very conservatively. The staff does not attempt to “zero out” accounts but purchase what is needed at the best possible price.
- **\$54,302:** Utilities expenses were lower than anticipated. Electricity usage was lower than forecasted. The final invoice comes in July and the cooler temperatures saved on air conditioning costs. Fuel for bus drivers was not fully expended. Bus drivers have until June 30<sup>th</sup> to take fuel and the towns bill in the next 4 -6 weeks. Not all the fuel was taken though the forecast assumed all fuel would be used.

**FY2018:**

The audited fund balance was \$3,127,505. The monthly forecast for May 2018 projected a fund balance of \$1,589,735, or **\$1,537,770 higher than the prior month’s forecast**. The major reasons for the significant increase in the yearend fund balance from one month to the next month were, as follows:

- **\$96,914:** Certified and classified salaries were lower than forecasted. It is not until the end of the fiscal year when we know the actual expenditures for coverages, substitutes, leaves of absences, overtime, and pay docks. We use conservative estimates in the forecasts based on past history.
- **\$21,583:** Special education transportation and tuition expenditures were lower than forecasted. The May forecast included the possible changes to outplacements and hospitalizations that did not occur.
- **\$741,387:** Medical & dental claims were lower than expected. Since we are self-insured, actual claims are not known until the end of the fiscal year. Based on actual claims, we returned these funds to the member towns.
- **\$129,529:** Lower legal expenses, speech therapy and occupational therapy professional services than anticipated.
- **\$25,989:** As part of the yearend processing, unspent encumbrances are eliminated.
- **\$10,299:** Final grant payments for Special Education and Transportation are not known until the end of the fiscal year.

**FY2019:**

The audited fund balance is \$2,033,027. The monthly forecast for May 2019 projected a fund balance of \$1,502,297 which included \$409,259 designated for security projects. The change is **\$531,804 higher than the prior month’s forecast**. The major reasons for the

significant increase in the yearend fund balance from one month to the next month were, as follows:

- **\$57,653:** Certified and classified salaries were lower than forecasted. It is not until the end of the fiscal year when we know the actual expenditures for coverages, substitutes, leaves of absences, overtime, and pay docks. Many unpaid leaves occur at the end of the school year. We use conservative estimates in the forecasts based on past history.
- **\$137,507:** Medical & dental claims were lower than expected. Since we are self-insured, actual claims are not known until the end of the fiscal year.
- **\$150,147** Purchased services were lower than forecasted. There were fewer interns than budgeted. Less than anticipated need for psychiatric consults and other consultants at PPTs. Less need for printed materials, postage, changes in special education transportation and athletic rentals were less than anticipated.
- **\$82,370:** Fuel costs for busses were less than anticipated. Repairs and maintenance costs for accounts other than facilities were down. Instructional supplies were less than anticipated.

## APPENDIX C

### RECAP OF 2016-2017

#### Return Unspent Fund Balance:

*The cancellation of 2015-2016 encumbrances of \$25,133 will be returned to the Member Towns. We encumber funds for goods and services received by June 30<sup>th</sup> but not yet billed. In some cases, the estimated amount encumbered varies from the actual invoice (e.g., utility bill; water bill) and we do not need to spend the entire encumbrance. Once the audit is final for 2016-2017, the funds will be returned.*

<i>Bethany</i>	<i>\$ 5,232</i>
<i>Orange</i>	<i>\$ 12,415</i>
<i>Woodbridge</i>	<i>\$ 7,486</i>
<i>Total</i>	<i>\$ 25,133</i>

The audited fund balance for 2016-2017 is \$1,793,498. The source of the available funds are described below.

#### FINANCIAL MANAGEMENT:

**\$ 246,520**

Our efforts to foster a District culture of finding cost savings and efficiencies has been successful producing savings of \$55,152. Utilities for electricity, heating oil and natural gas were below budget by \$191,368 due to many conservation efforts and price negotiations.

#### SPECIAL EDUCATION (NET)

**\$ 477,890**

These accounts are extremely difficult to forecast. As examples, special need students can be hospitalized; move into the district or leave the district at any time; withdraw from Amity and enroll in Adult Education. Several students who were budgeted to be outplaced were not for a number of reasons. Some transportation needs were coordinated with the elementary districts to reduce the number of singletons on busses for outplacements. Any one of these events can have a significant impact, positive or negative, on the District's special education expenditures. The State reimbursement rate fluctuates throughout the year. Expenses were down \$790,238 which reduced revenue by \$477,890. The budget forecasted 70% reimbursement rate and the final rate was 76.9%.

#### SALARIES, MEDICAL, PURCHASED SERVICES (OTHER):

**\$ 756,654**

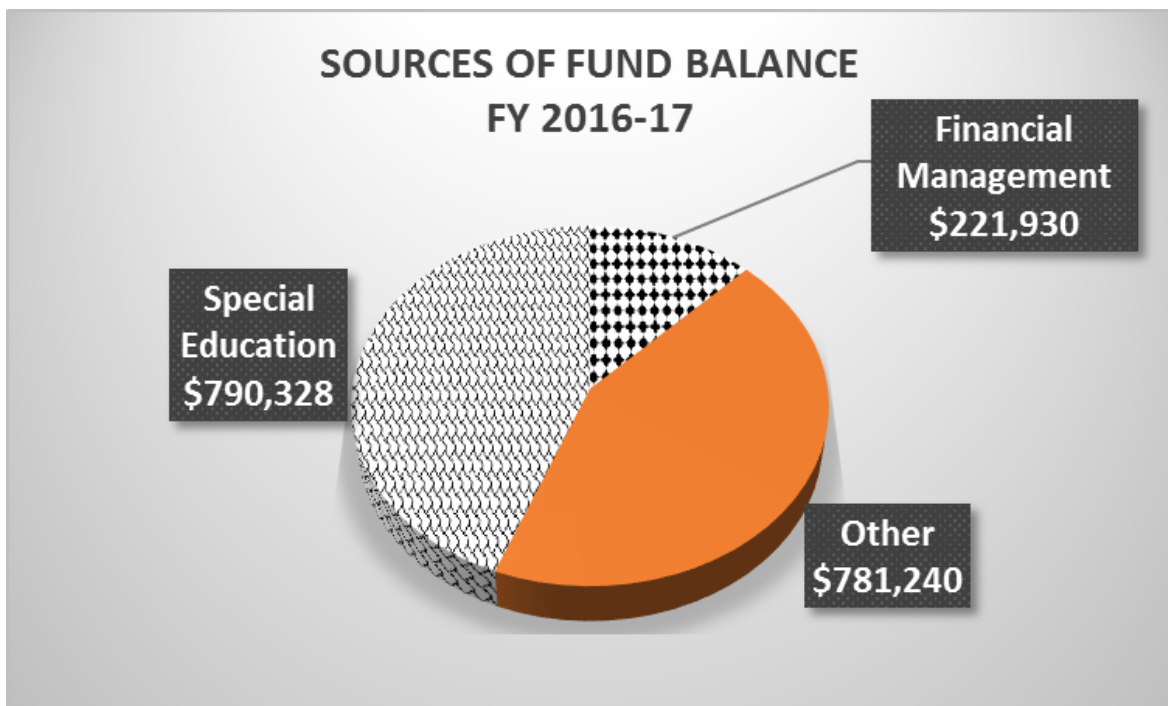
**\$230,437 SALARIES (OTHER):** "Turnover savings" from replacing teachers and other staff who retired or resigned is over budget and savings from unpaid leaves-of-absence. Athletic salaries were down from unfilled coaching positions at the middle school including cheerleading and several assistant coaching positions. Teacher coverages, summer work costs, substitute costs, degree changes and homebound services were less than anticipated.

**\$351,480 MEDICAL (OTHER):** The net balance of the medical account was under budget. Claims and fees were lower than budgeted. The savings was offset by other

components of the account including employer contributions to HSA accounts, retiree payments, and employee co-share contributions.

**\$113,767 PURCHASED SERVICES (OTHER):** Purchased services costs were lower due to a number of factors. There were less interns than anticipated. Fewer home athletic contests at the high school which required fewer officials, monitors, and scorekeepers; and less than anticipated need for psychiatric consults, professional’s attendance at PPTs and behavior specialists’ services.

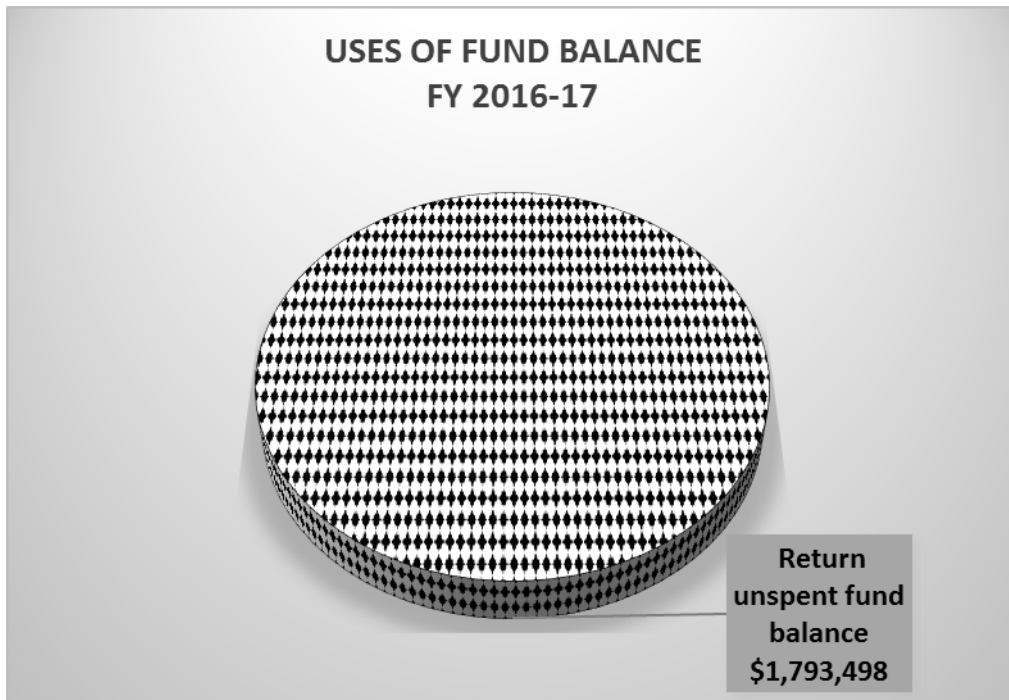
The primary sources of the fund balance are shown graphically below:



The Board of Education approved uses of the fund balance are, as follows:

1. **\$1,793,498** - Return of unspent fund balance per audit.

The uses of the fund balance are shown graphically below:



**Return Unspent Fund Balance:**

The *audited* unspent fund balance will be returned to the Member Towns, as follows:

Bethany	\$ 365,676
Orange	\$ 874,151
Woodbridge	<u>\$ 553,671</u>
<b>Total</b>	<b>\$1,793,498</b>

## APPENDIX D

### RECAP OF 2017-2018

#### Return Unspent Fund Balance:

*The cancellation of 2016-2017 encumbrances of \$86,227 will be returned to the Member Towns. We encumber funds for goods and services received by June 30<sup>th</sup> but not yet billed. In some cases, the estimated amount encumbered varies from the actual invoice (e.g., utility bill; water bill, pending special education settlements) and we do not need to spend the entire encumbrance. Once the audit is final for 2017-2018, the funds will be returned.*

<i>Bethany</i>	<i>\$17,581</i>
<i>Orange</i>	<i>\$42,027</i>
<i>Woodbridge</i>	<i><u>\$26,619</u></i>
<i>Total</i>	<i>\$86,227</i>

The audited fund balance for 2017-2018 is \$3,127,505. The source of the available funds are described below.

#### FINANCIAL MANAGEMENT:

**\$ 78,987**

Our efforts to foster a District culture of finding cost savings and efficiencies has been successful producing savings of \$38,753. Grant money was applied for and awarded to offset the cost of the CEN for savings of \$27,440. The District applied for a grant for displaced students to due hurricanes but received the grant award notice and funds after the fiscal year ended. Restraints of the grant did not allow us to spend it after the fiscal year so it became part of the fund balance.

#### SPECIAL EDUCATION (NET)

**\$ 996,157**

These accounts are extremely difficult to forecast. As examples, special need students can be hospitalized; move into the district or leave the district at any time; withdraw from Amity and enroll in Adult Education. Several students who were budgeted to be outplaced were not for a number of reasons. Some transportation needs were coordinated with the elementary districts to reduce the number of singletons on busses for outplacements. Any one of these events can have a significant impact, positive or negative, on the District's special education expenditures. The Director of Pupil Services has been successful in establishing suitable programs for students within the District and a number of students have returned from outplacement.

#### OTHER:

**\$ 2,052,361**

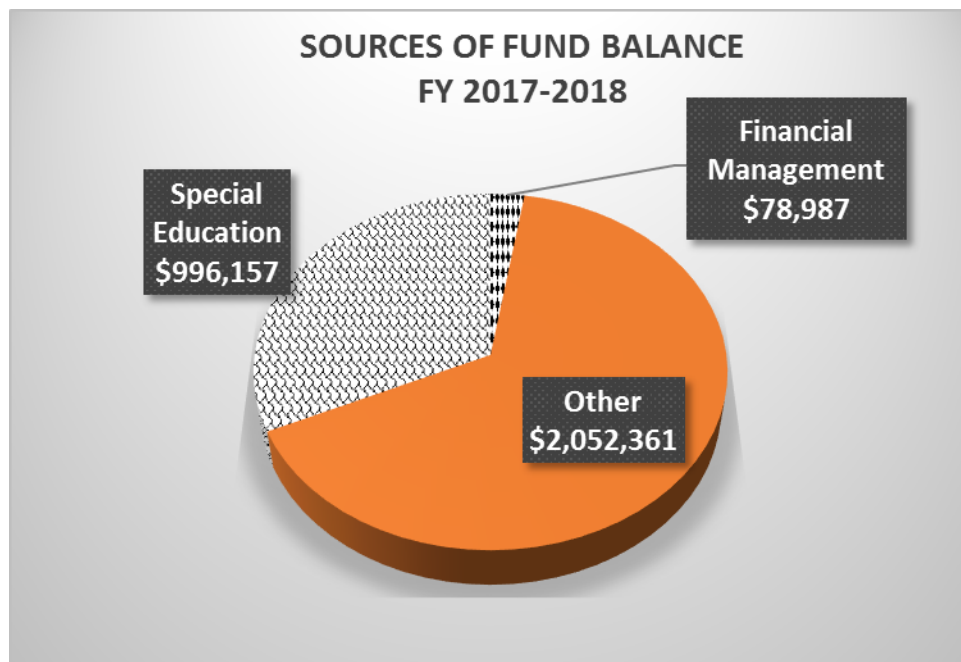
**\$342,994 SALARIES (OTHER):** "Turnover savings" from replacing teachers and other staff who retired or resigned is over budget and savings from unpaid leaves-of-absence. Athletic salaries were down from unfilled coaching positions at the middle school including cheerleading and several assistant coaching positions. Teacher coverages, summer work costs, substitute costs, degree changes and homebound services were less than anticipated.

**\$1,395,839 MEDICAL (OTHER):** The net balance of the medical account was under budget. Claims and fees were much lower than budgeted, only costing 72% of expected claims. The savings was offset by other components of the account including employer contributions to HSA accounts, retiree payments, and employee co-share contributions.

**\$29,913 FACILITIES (OTHER):** The Director of Facilities manages projects and supplies in a very conservative manner. Many projects were completed in-house including tuck-point repair of the field house, concrete sidewalk patches and step repair, and electrical repairs.

**\$29,177 STAFF TRAVEL, CONFERENCES AND DUES & FEES:** Schedule conflicts precluding some staff from attending conferences, other staff were presenters at conferences and registration fees were waived, and a few less requests from students for contest entries. The appropriate funding level for these accounts will be reviewed in the upcoming budget cycle.

The primary sources of the fund balance are shown graphically below:

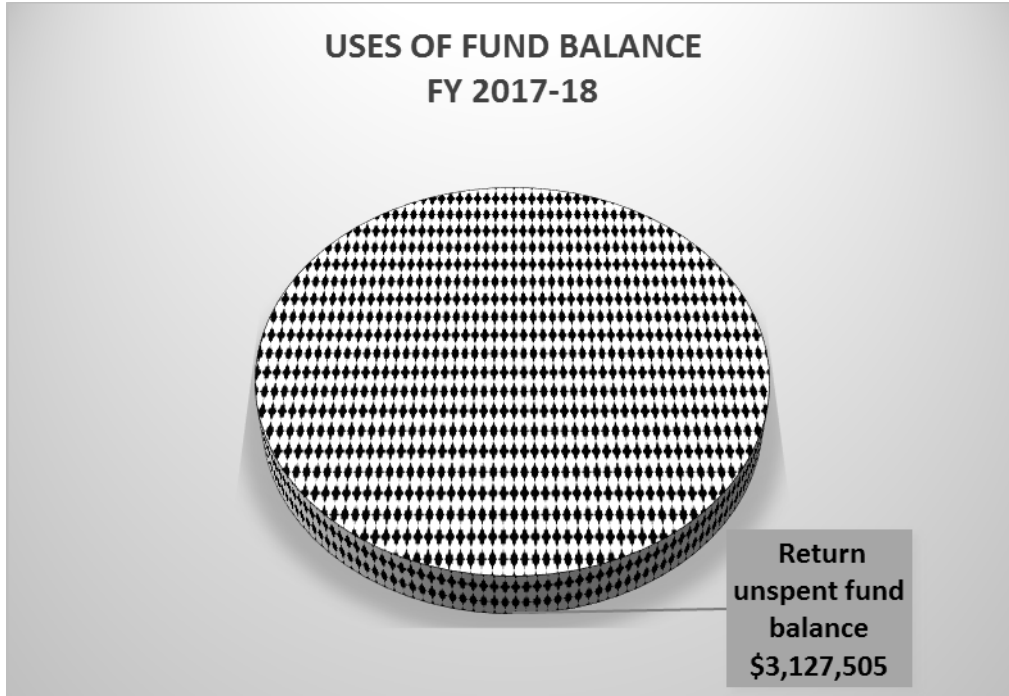


The use of the fund balance as voted on in the September 2108 AFC and BOE meetings is as follows:



1. **\$3,127,505** - Return of unspent fund balance per audit.

The uses of the fund balance are shown graphically below:



**Return Unspent Fund Balance:**

The audited unspent fund balance will be returned to the Member Towns, as follows:

<i>Town of Bethany</i>	<i>\$ 615,493</i>
<i>Town of Orange</i>	<i>\$1,556,778</i>
<i>Town of Woodbridge</i>	<i><u>\$ 955,234</u></i>
<i>Total</i>	<i>\$3,127,505</i>

**APPENDIX E**  
**RECAP OF 2018-2019**

**Return Unspent Fund Balance:**

*The cancellation of 2017-2018 encumbrances of \$166,245 will be returned to the Member Towns. We encumber funds for goods and services received by June 30<sup>th</sup> but not yet billed. In some cases, the estimated amount encumbered varies from the actual invoice (e.g., utility bill; water bill, pending special education settlements) and we do not need to spend the entire encumbrance. Once the audit is final for 2018-2019, the funds will be returned.*

<i>Bethany</i>	<i>\$32,717</i>
<i>Orange</i>	<i>\$82,752</i>
<i>Woodbridge</i>	<i><u>\$50,776</u></i>
<i>Total</i>	<i>\$166,245</i>

The audited fund balance for 2018-2019 is \$2,033,027 plus \$409,259 designated at year-end for security projects. The source of the available funds are described below.

**FINANCIAL MANAGEMENT:**

**\$ 204,608**

Our efforts to foster a District culture of finding cost savings and efficiencies has been successful in producing savings of \$52,451. Grant money was applied for and awarded to offset the cost of the CEN for savings of \$27,440. \$5,000 less postage used due to digital communications. The District refinanced bonds and saved \$27,738 in interest payments. The District chose leasing 1:1 mobile devices as a more cost effective and technological practice, \$108,493. The device can be kept current for curriculum needs and the District is not responsible for disposals. Computers from the current computer labs at the middle schools provided a source of replacement computers and repair parts avoiding new purchases.

**SPECIAL EDUCATION (NET)**

**\$ 539,798**

These accounts are extremely difficult to forecast. As examples, special need students can be hospitalized; move into the district or leave the district at any time; withdraw from Amity and enroll in Adult Education. Several students who were budgeted to be outplaced were not for a number of reasons. Some transportation needs were coordinated with the elementary districts to reduce the number of singletons on busses for outplacements. Any one of these events can have a significant impact, positive or negative, on the District's special education expenditures. The Director of Pupil Services has been successful in establishing suitable programs for students within the District and a number of students have returned from outplacement.

**OTHER:**

**\$ 1,288,621**

**\$346,235 SALARIES (OTHER):** "Turnover savings" from replacing teachers and other staff who retired or resigned is over budget and savings from unpaid leaves-of-absence. Athletic salaries were down from unfilled coaching positions at the middle school including cheerleading and several assistant coaching positions. Teacher coverages,

summer work costs, substitute costs, degree changes and homebound services were less than anticipated.

**\$387,507 MEDICAL (OTHER):** The net balance of the medical account was under budget. Claims and fees were slightly lower than budgeted, \$328,426, costing 92.2% of expected claims. There were some other savings with other components of the account including employer contributions to HSA accounts, retiree payments, and employee co-share contributions.

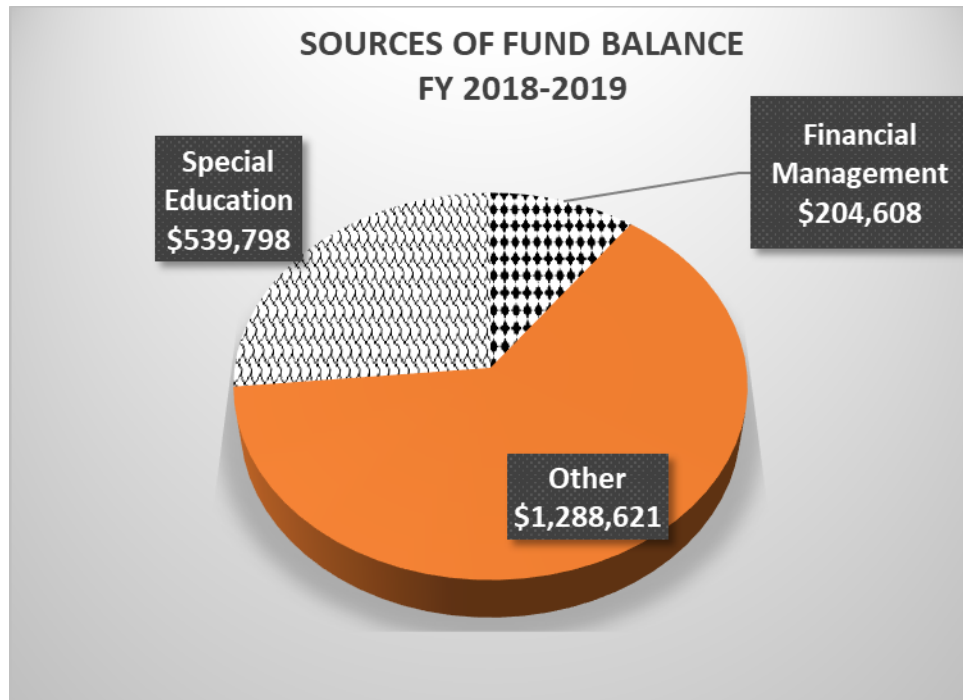
**\$378,012 REVENUE:** The Special Education Grant was higher than budgeted by \$224,297 based on actual special education costs and a higher reimbursement rate. The interest earned on the District's accounts was \$100,966 more than budgeted as interest rates were higher than budgeted. These accounts were adjusted for the current budget cycle, 2019-2020.

**\$79,974 SUPPLIES:** Instructional supplies and transportation fuel were underbudget. The transportation fuel bid price was lower than budgeted and less fuel was used with some routes being reassigned. Mid-year staff changes may have impacted the spending in some instructional supply accounts. These areas were reviewed during the 2019-2020 budget and will be reviewed again during the upcoming budget process.

**\$39,009 RENTALS:** Athletic rentals were down \$19,552 due to lower ice rentals contract negotiated with new venue and the Town of Orange pool was being upgraded and was not available for part of the year. Another facility was used at lower cost. Special education rental of lease space was lower than anticipated and partially covered by a grant, \$17,400.

**\$39,934 STAFF TRAVEL, CONFERENCES AND DUES & FEES:** Schedule conflicts precluding some staff from attending conferences, grants funded some conferences, new staff attended fewer conferences and a few less requests from students for contest entries. The appropriate funding level for these accounts will be reviewed in the upcoming budget cycle.

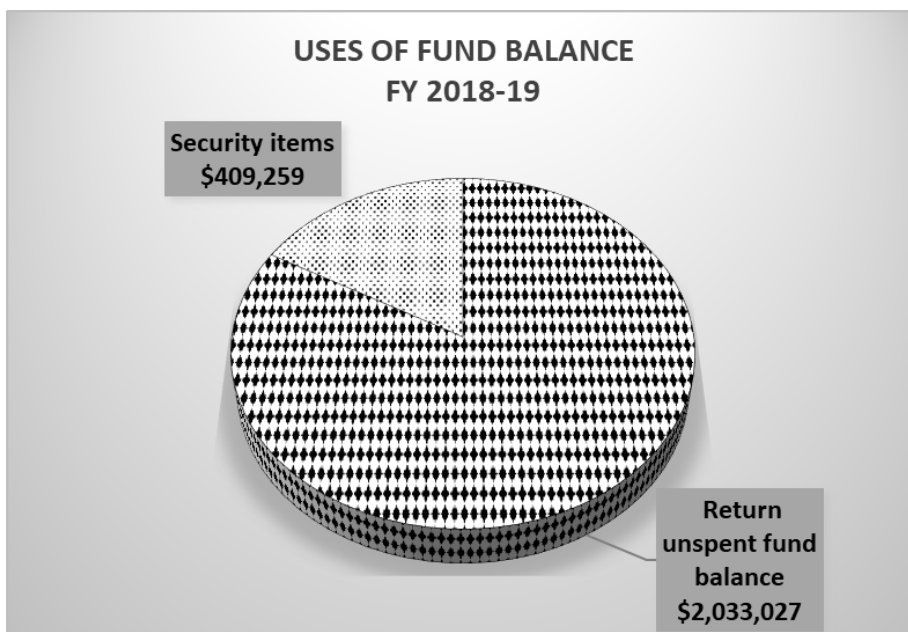
The primary sources of the fund balance are shown graphically below:



The use of the fund balance is proposed to return to the the member towns:

1. **\$409,259** was designated in June 2019 for security projects
2. **\$2,033,027** - Return of unspent fund balance upon audit completion.

The uses of the fund balance are shown graphically below:



**Return Unspent Fund Balance:**

The final audited unspent fund balance will be returned to the Member Towns, as follows:

<i>Town of Bethany</i>	<i>\$ 392,171</i>
<i>Town of Orange</i>	<i>\$1,020,173</i>
<i>Town of Woodbridge</i>	<i><u>\$ 620,683</u></i>
<i>Total</i>	<i>\$2,033,027</i>

**Amity Regional School District No. 5 - Budget Transfers 2019-2020**

<u>MONTH/YR</u>	<u>JNL#</u>	<u>ACCOUNT NUMBER &amp; DESCRIPTION</u>	<u>AMOUNT</u>	<u>DESCRIPTION</u>
2020-Aug	58	02-11-1011-5611 INSTRUCTIONAL SUPPLIES	(2,200.00)	8/16/2019 GYM EQUIPMENT
2020-Aug	58	02-11-1011-5730 EQUIPMENT - NEW	2,200.00	8/16/2019 GYM EQUIPMENT
2020-Sept	31	03-11-1001-5730 EQUIPMENT - NEW	2,900.00	CAMERAS FOR ADDED PHOTO CLASS
2020-Sept	31	03-11-1001-5611 INSTRUCTIONAL SUPPLIES	(2,900.00)	CAMERAS FOR ADDED PHOTO CLASS
2020-Sept	46	04-12-6110-5510 PUPIL TRANSPORTATION	(1,470.00)	TRANSPORTATION - ERZA ACADEMY
2020-Sept	46	05-14-2700-5513 IN DISTRICT PRIVATE REG ED	1,470.00	TRANSPORTATION - ERZA ACADEMY
2020-Sept	49	02-13-2400-5731 EQUIPMENT - REPLACEMENT	500.00	ERGONOMIC CHAIR
2020-Sept	49	02-13-2400-5330 OTHER PROFESSIONAL & TECH SVCS	(500.00)	ERGONOMIC CHAIR
2020-Sept	128	04-12-6110-5510 PUPIL TRANSPORTATION	(297.00)	TRANSPORTATION - TO ACES ECA
2020-Sept	125	05-14-2700-5515 OUT DISTRICT - PUBLIC REG ED	297.00	TRANSPORTATION - ACES
2020-Sept	210	02-13-2400-5581 TRAVEL - CONFERENCES	(50.00)	MEMBERSHIP/CONFERENCE REG
2020-Sept	210	02-11-1008-5810 DUES&FEES	50.00	MEMBERSHIP/CONFERENCE REG
2020-Oct	79	01-11-1008-5810 DUES&FEES	100.00	CONFERENCE FEE INCREASE
2020-Oct	79	01-11-1008-5611 INSTRUCTIONAL SUPPLIES	(100.00)	CONFERENCE FEE INCREASE
2020-Oct	149	03-11-1014-5611 INSTRUCTIONAL SUPPLIES	(15.00)	NEED MORE MAH TEXTS
2020-Oct	149	03-11-1014-5641 TEXTBOOKS	15.00	NEED MORE MAH TEXTS
2020-Oct	149	03-11-1014-5690 OTHER SUPPLIES	(458.00)	NEED MORE MAH TEXTS
2020-Oct	149	03-11-1014-5641 TEXTBOOKS	458.00	NEED MORE MAH TEXTS
2020-Oct	149	03-11-1014-5810 DUES&FEES	(5.00)	NEED MORE MAH TEXTS
2020-Oct	149	03-11-1014-5641 TEXTBOOKS	5.00	NEED MORE MAH TEXTS
2020-Oct	251	01-11-1014-5611 INSTRUCTIONAL SUPPLIES	(396.00)	MOBY MAX LICENSE
2020-Oct	251	05-14-2350-5690 OTHER SUPPLIES	396.00	MOBY MAX LICENSE
2020-Oct	255	02-11-1009-5611 INSTRUCTIONAL SUPPLIES	(199.00)	MOBY MAX LICENSE
2020-Oct	255	05-14-2350-5690 OTHER SUPPLIES	199.00	MOBY MAX LICENSE
2020-Nov	144	01-11-1010-5330 OTHER PROFESSIONAL & TECH SVCS	(300.00)	SUPPLIES FOR WINTER CONCERT
2020-Nov	144	01-11-1010-5611 INSTRUCTIONAL SUPPLIES	300.00	SUPPLIES FOR WINTER CONCERT
2020-Dec	15	04-12-6117-5560 TUITION	(2,984.00)	TRANSPORTATION - MEDICAL
2020-Dec	15	05-14-2700-5514 IN DISTRICT PUBLIC REG ED-MED	2,984.00	TRANSPORTATION - MEDICAL
2020-Dec	72	04-13-2190-5330 OTHER PROFESSIONAL & TECH SRVC	(55.00)	MEMBERSHIP DUES ASHA
2020-Dec	72	04-13-2190-5810 DUES & FEES	55.00	MEMBERSHIP DUES ASHA
2020-Dec	85	05-15-1026-5111 CERTIFIED SALARIES	(2,600.00)	COVERAGE FOR S & L VACANCY
2020-Dec	85	04-12-2150-5330 OTHER PROFESSIONAL & TECH SRVC	2,600.00	COVERAGE FOR S & L VACANCY

# AMITY REGIONAL SCHOOL DISTRICT NO. 5

Bethany Orange Woodbridge  
25 Newton Road, Woodbridge Connecticut 06525



Theresa Lumas  
Director of Finance and Administration  
[terry.lumas@amityregion5.org](mailto:terry.lumas@amityregion5.org)

Phone (203) 397-4813  
Fax (203) 397-4864

To: Dr. Jennifer Byars, Superintendent of Schools  
From: Theresa Lumas, Director of Finance and Administration  
Re: Budget Transfers over \$3,000 - **Fiscal Year 2019-2020**  
Date: February 3, 2020

I recommend the Amity Finance Committee and Amity Board of Education approve the following budget transfer request(s):

## **Finance:**

### **1. Facility Projects:**

A bond referendum was held on Wednesday, December 4, 2019 and facilities projects were approved by the voters. The HVAC projects for the high school were bid and awarded to Sav-Mor. Jim Saisa has been working with vanZelm Engineering and Sav-Mor to plan the specifics of the projects. The cost of engineering was included in the total bond costs. Construction administration expenses will begin immediately. Cash flow estimates for the HVAC engineering for this portion of the work is \$9,000. I am requesting we use contingency funds for payments until a borrowing plan is presented.

## **Motions:**

### **For the Amity Finance Committee:**

*Recommend the Amity Board of Education approve ...*

### **For the Amity Board of Education:**

*Move to approve...*

*the following budget transfer to cover the initial costs of the construction administration for the HVAC facilities project..*

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
05-14-2600-5330	Professional Technical Services		\$9,000
05-14-2600-5715	Facilities Contingency	\$9,000	

**Special Education:**

Transportation costs for students has increased. A budget transfer is needed to cover this cost.

**Motions:**

**For the Amity Finance Committee:**

*Recommend the Amity Board of Education approve...*

**For the Amity Board of Education:**

*Move to approve –*

*The following budget transfer to cover the transportation costs for public transportation into the District*

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
04-12-6130-5510	Private Out Transportation	\$12,000	
04-12-6116-5510	Public In Transportation		\$12,000



**AMITY REGIONAL SCHOOL DISTRICT NO. 5**  
**Bethany Orange Woodbridge**  
**25 Newton Road, Woodbridge Connecticut 06525**



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TO: Dr. Jennifer Byars, Superintendent of Schools

FROM: Theresa Lumas, Director of Finance & Administration

DATE: March 5, 2020

RE: 2020-2021 Budget

The bylaws of the Amity Board of Education required the Amity Finance Committee to recommend a budget annually by March 1. The budget approved at the special meeting held on February 24, 2020 was \$50,781,264, a 2.49% increase.

The Superintendent's budget request for the 2020-2021 Budget is for \$51,051,267, a 3.03% increase. The reduction from the 3.14% increase reflects a number of reductions including the change from requesting School Resource Officers (SRO)s to School Security Officers (SSO)s and increases for several professional services were reduced through negotiations with the vendors.

The budget may be reduced to 2.79% by cutting an additional number of items and the use of end-of-year funds (if available). The forecast for the current month is favorable to support these purchases.

Early correspondence and meeting discussions described the challenges of additional cuts. There are corresponding increases in the plans for curriculum and operations if certain items are cut. These include eliminating 1:1 for the 10<sup>th</sup> grade changes the textbook purchase plan, deferring maintenance on facilities may lead to emergency repairs in the future, and reducing staff will likely increase unemployment costs. There is an increasing level of risk in the proposed budget, which reflects savings from five teachers retiring, currently only one is known. The infrastructure bid results are under review and not all proposals hit the budget estimate for next year. Attached is a range of budget increases and the town allocations changes for several scenarios.

**Budget Dates:**

Wednesday, March 11, 2020 – Special Board Meeting – Budget Workshop  
Monday, April 6, 2020 – District Meeting – Public Hearing  
Monday, April 6, 2020 – Special Board Meeting to vote on budget, direct development of  
explanatory text, and set Annual Meeting Date  
Monday, May 4, 2020 – Annual District Meeting  
Tuesday, May 5, 2020 – Budget Referendum held in all three member towns.

TOWN ALLOCATION AT VARIOUS BUDGET LEVELS

<b>3.03% BUDGET</b>				
	<b>FY20</b>	<b>FY21</b>	<b>\$VAR</b>	<b>%VAR</b>
BETHANY ALLOCATION	8,926,150	9,048,983	122,833	1.38%
ORANGE ALLOCATION	24,736,074	25,137,842	401,767	1.62%
WOODBIDGE ALLOCATION	14,965,743	15,840,722	874,979	5.85%
<b>MEMBER TOWN ALLOCATIONS</b>	<b>48,627,967</b>	<b>50,027,547</b>	<b>1,399,579</b>	<b>2.88%</b>
<b>2.79% BUDGET</b>				
	<b>FY20</b>	<b>FY21</b>	<b>\$VAR</b>	<b>%VAR</b>
BETHANY ALLOCATION	8,926,150	9,027,620	101,470	1.14%
ORANGE ALLOCATION	24,736,074	25,078,496	342,421	1.38%
WOODBIDGE ALLOCATION	14,965,743	15,803,326	837,583	5.60%
<b>MEMBER TOWN ALLOCATIONS</b>	<b>48,627,967</b>	<b>49,909,442</b>	<b>1,281,474</b>	<b>2.64%</b>
<b>2.49% BUDGET</b>				
	<b>FY20</b>	<b>FY21</b>	<b>\$VAR</b>	<b>%VAR</b>
BETHANY ALLOCATION	8,926,150	8,999,868	73,718	0.83%
ORANGE ALLOCATION	24,736,074	25,001,402	265,327	1.07%
WOODBIDGE ALLOCATION	14,965,743	15,754,744	789,001	5.27%
<b>MEMBER TOWN ALLOCATIONS</b>	<b>48,627,967</b>	<b>49,756,014</b>	<b>1,128,046</b>	<b>2.32%</b>
<b>2.20% BUDGET</b>				
	<b>FY20</b>	<b>FY21</b>	<b>\$VAR</b>	<b>%VAR</b>
BETHANY ALLOCATION	8,926,150	8,974,146	47,996	0.54%
ORANGE ALLOCATION	24,736,074	24,929,948	193,873	0.78%
WOODBIDGE ALLOCATION	14,965,743	15,709,717	743,974	4.97%
<b>MEMBER TOWN ALLOCATIONS</b>	<b>48,627,967</b>	<b>49,613,811</b>	<b>985,843</b>	<b>2.03%</b>

# **AMITY REGIONAL SCHOOL DISTRICT NO. 5**

**Bethany Orange Woodbridge**  
**25 Newton Road, Woodbridge Connecticut 06525**



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**Theresa Lumas**  
**Director of Finance and Administration**  
[terry.lumas@amityregion5.org](mailto:terry.lumas@amityregion5.org)

**Phone (203) 397-4813**  
**Fax (203) 397-4864**

To: Dr. Jennifer Byars, Superintendent of Schools

From: Theresa Lumas, Director of Finance and Administration

Re: Food Service Analysis - **Fiscal Year 2019-2020**

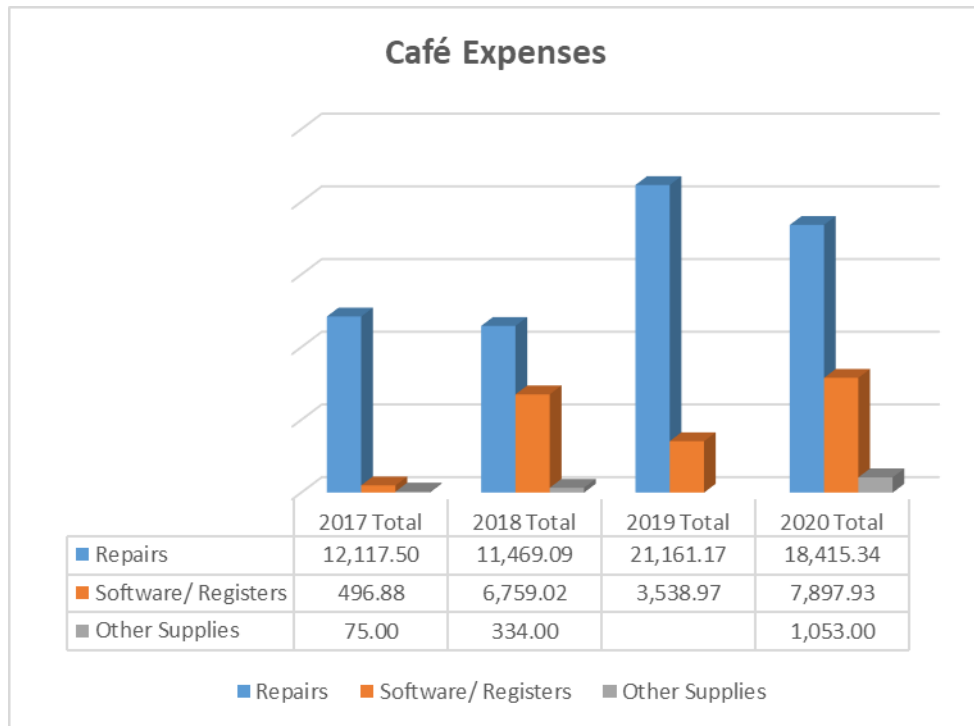
Date: February 27, 2020

In addition to the external review of the Food Service Program, Ms. Kovalik, Assistant Director of Finance & Administration, Mr. Ferrara, Director of Dining Services, and Mr. Fred Valfer, District Manager of Chartwells and I have been reviewing the financial condition of the program over the past few months.

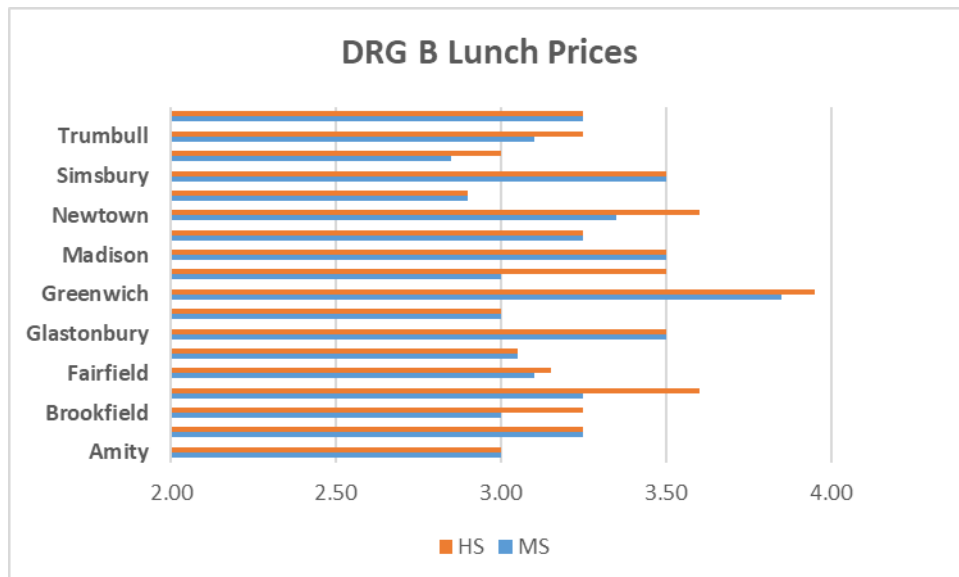
The food service program had been self-supporting for over 15 years and at times generated a modest profit. The general fund has not incurred costs other than small mandated payments. However, there have been several changes in the past couple of years that have depleted the fund balance. Several charts follow to illustrate the details, but in summary the factors are additional repair and maintenance costs as equipment ages, changes in service hours (per administration requests), and State changes to eligibility for free and reduced lunch.

We are continuing our review and preparing a final recommendation for the May or June Board meeting that will include a transfer of funds from the General Fund to the School Lunch Account and a recommendation for increasing prices. The recent price increase was only on adult meals at the middle schools. The State auditor indicated during our five-year review we should expect the Price Equity Formula for 2020-2021 would require a price increase for us to be compliant as well. My current estimate is approximately \$50,000 will be requested to cover the repair and maintenance of our equipment and software licenses. This should cover the anticipated deficit in the current fiscal year, 2019-2020 and the same expenses in next fiscal year. There is currently nothing in the 2020-2021 budget proposal to support the School Lunch Account.

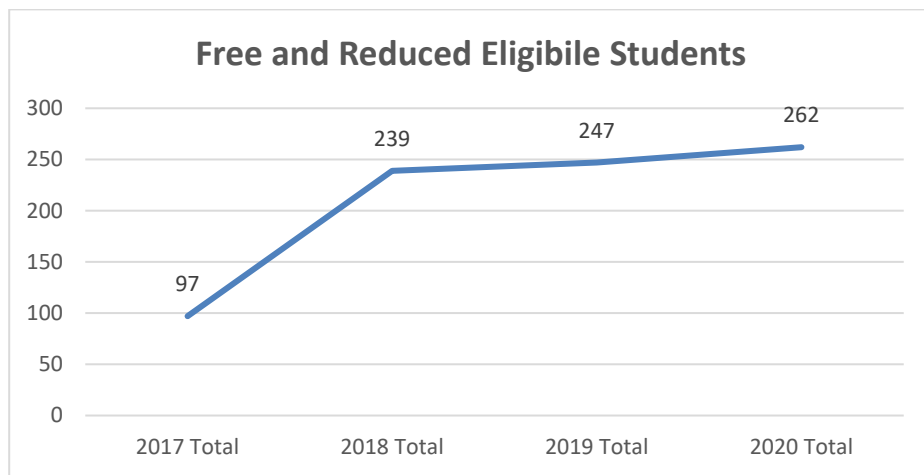
The general maintenance of the equipment including replacements, software costs, and ancillary supplies has increased over the past few years. This is due to aging equipment and ongoing support for software. These costs have traditionally been paid from the School Lunch Account. The General Fund will have to begin funding these expenses.



The price of lunch is low compared with our DRG. We last raised prices across all lunches in 2016. In 2018, we raised just pizza at the middle school and adult at the high school. In fall of 2019, adult meals at the middle school were increased.



The eligibility guidelines changed in March of 2018, significantly increasing the number of students eligible for free or reduced meals. We have tiered pricing and there are no restrictions to which tier meal a student may select. This is standard in schools to avoid overt identification of students' eligibility. Thus, the increased number of students eligible may be a factor in the growing deficit.



**AMITY REGIONAL SCHOOL DISTRICT NO. 5**  
**Bethany Orange Woodbridge**  
**25 Newton Road, Woodbridge, Connecticut 06525**



**Kathy Kovalik**  
**Assistant Director of Finance & Administration**

**kathleen.kovalik@amityregion5.org**  
**203.397.4801**

To: Dr. Jennifer Byars, Superintendent of Schools  
From: Kathy Kovalik, Assistant Director of Finance & Administration  
CC: Terry Lumas, Director of Finance & Administration  
Re: State Administrative Review of the School Lunch Program  
Date: March 5, 2020

**Overview:**

One member of the State Department of Education, Bureau of Health/Nutrition, Family Services and Adult Education visited Amity Regional School District No. 5 February 26 through February 28, 2020. The Administrative Review is a process where the State reviews our practices and procedures both in document form and actual service periods. The comprehensive review process is performed in a district every five years.

There were two prerequisite off-site reviews which involved responding to questionnaires and submitting documentation last fall. Additionally an on-line assessment tool which consists of questionnaires about our food service procedures and uploading documentation into the CSDE website was completed in the beginning of January 2020. Service records were reviewed for the month of January 2020. This is followed by a three day in house review which consisted of monitoring the breakfast and lunch operation at the high school and reviewing all the required documentation for the National School Lunch Program. The reviewer shared her findings in an exit interview before leaving the District. We are required to respond to some action items by March 30, 2020 and others by June 15, 2020.

The findings included:

- Posting signage that clearly informs students of what they can select with each breakfast meal and to post signage that clearly indicates the price of chips, snacks and Al-la-carte items.
- To begin using an updated log to track all staff's training.
- To make available to all parents and students a newly created CSDE template for Civil Rights complaints.
- Create a field trip bagged lunch meal procedure that meets the meal pattern requirements.

A separate review of the Wellness Policy and Procedures was conducted with recommendations provided. The wellness review has been forwarded to the Wellness Committee.

**Additional comments from the reviewer:**

"I found the staff at Amity High School were very welcoming and accommodating. The food service staff had a good rapport with the students and were well trained in the components of the healthy meal pattern requirements. The menu provided a variety of menu options for the students. Overall this was a great review, procedures were well documented and appropriately followed."

**Response:**

The required action items are in the process of being addressed. The responses will be submitted to the CSDE by the March 30, 2020 and June 15, 2020 deadlines.

## Child Nutrition Program Administrative Review Overview Report

This form represents written notification of the findings of this review, required corrective action, and the timeframe for the required corrective action. **This information will be shared with the superintendent and/or appropriate administrative personnel.**

<b>Sponsor Name:</b> Regional School District #5	<b>Sponsor Number:</b> 20500	<b>Review Date(s):</b> 2/26-2/28/2020
-----------------------------------------------------	---------------------------------	------------------------------------------

Schools Reviewed	Site Number
1. Amity Regional High School	61
2.	
3.	
4.	
5.	
6.	

State Reviewers
1. Lead: Fionnuala Brown Phone: 860-807-2129
2.
3.
4.
5.
6.

Check CNP Programs Reviewed		Check Type of Review		Check if Applicable	
X	National School Lunch Program		Follow-up		Provision 2
X	School Breakfast Program		Additional		Community Eligibility Provision
	After School Snack Program	Do all of the schools in the district participate in the School Breakfast Program? <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO If no, indicate the district's reason given during the exit conference:  <i>Information provided to sponsor regarding expanding SBP.</i>			
	Fresh Fruit and Vegetable Program				
	Seamless Summer Food Program				
	Special Milk Program				
	Does your district/institution participate in Farm to School? <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO <i>Information provided to sponsor regarding Farm to School.</i>				

<b>Date of Exit Conference:</b> 2/28/2020	<b>Response Due Date:</b> 3/30/2020 <b>unless otherwise indicated.</b>
<b>The <i>Response Due Date</i> is the date the sponsor's response and written Corrective Action Plan are due to the lead reviewer. Note: Failure to respond by this date will result in Claims for Reimbursements being withheld.</b>	

- I. **Overview of Sponsor Findings:** Attached is an overview of findings from the reviewed materials and school(s). Please note that any findings associated with Meal Access and Reimbursement, and Meal Pattern and Nutritional Quality may result in fiscal action. Each problem area cited must be addressed in your written Corrective Action Plan to the Child Nutrition Programs (CNP). All findings have been entered into the CNP Online System Compliance Module. Corrective Action must be completed and submitted the Compliance Module <https://ct.cnpus.com/prod/Splash.aspx>.

*In addition to the areas noted with findings. The following areas were reviewed and technical assistance was provided as needed.*

- Meal Access and Reimbursement
- Certification and Benefit Issuance
- Verification
- Meal Counting and Claiming
- Nutritional Quality and Meal Pattern –
- Meal Components and Quantities
- Offer versus Serve
- Dietary Specifications & Nutrition Analysis
- Resource Management - Maintenance of Non-Profit School Food Service Account
- Resource Management - Paid Lunch Equity
- Resource Management - Revenue from Non-Program Food
- Resource Management - Indirect Costs
- General Areas - Civil Rights
- General Areas - On-site Monitoring
- General Areas - Local School Wellness Policy
- General Areas - Smart Snacks in School
- General Areas – Food Safety
- General Areas – School Breakfast and Summer Food Service Programs Outreach
- General Areas - Professional Standards



**Regional District #5 School Lunch (20500)**

**Review ID: 1784**

**Exit Conference Date: 2/28/2020**

**Review Year: 2019-2020**

**Month of Review: January**

**Lead Reviewer: Fionnuala Brown**

Area	Findings ID	Finding Description	Required Corrective Action
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**Sponsor - Level Findings**

100 - Certification and Benefit Issuance	V-0100	There are students were listed on the benefit issuance document whose parents have refused benefits. Only students eligible to receive free and reduced price meals are listed on the benefit issuance document. Technical assistance provided.	Provide written assurance that only students eligible for benefits will be listed on the benefit issuance document
1200 - Professional Standards	V-1200	All employees who have duties related to the operation of the School Nutrition Program who are not food service employees are also required by the Professional Standards Final Rule to have job-specific training to ensure that they perform their jobs effectively and in compliance with program regulations. This includes, but is not limited to employees involved with the application and verification process, meal counting and claiming, on-site monitoring, civil rights procedures, etc. Training must be documented and tracked on an annual basis to ensure compliance.	Update tracking log to include all applicable staff and submit completed tracking form June 15, 2020.
1200 - Professional Standards	V-1200	No formal tracking system was in place for SY 2018-2019 to track staff training completed by the food service staff. Effective July 2015 USDA requires all sponsors to track training hours for every food service staff member, and to ensure that each staff member meets the minimum required hours of training each year based on their position in the food service department. A formal tracking log is in place for SY 2019-2020	Provide written assurance that the professional standards regulations will be met and formal tracking will be documented.
1000 - Local School Wellness Policy	V-1000	A comprehensive review of the Local School Wellness Policy (LSWP) was conducted off-site by Donna Heins, Education Consultant. A copy of her assessment was sent by e-mail to the Business Official and Food Service Director. The findings noted in this report do not require corrective action, however, the SFA should take note of these	No further action required.

		deficiencies and make plans to address them to ensure compliance with the current Healthy, Hunger-Free Kids Act of 2010 (Sec. 204 of Public Law 111-296) regulations. The SFA is not required to submit any further LSWP information to the Connecticut State Department of Education (CSDE).	
300 - Meal Counting and Claiming	V-0300	It was identified during preparation for the on-site review that a teacher was entering their child's pin number and that adult meals were counted as a reimbursable meals. It was determined by the School Food Authority that a total of 44 lunches and 1 breakfast was claimed incorrectly from September 2019-December 2019, the January 2020 claim was adjusted to correct this error.	Develop and submit the plan on how this issue will not occur in the future, include documentation of staff training.
800 - Civil Rights	V-0800	The complaint process that is in place does not address complaints filed against the federal Child Nutrition Programs. USDA has its own set of processes that a Local Education Agency must follow to be in compliance with USDA's federal regulations. Technical assistance and the CSDE sample template was provided.	Develop and forward procedures on how the district will handle civil rights complaints related to the Child Nutrition Programs.

**Site - Level Findings: Amity Regional High School (61)**

400 - Meal Components and Quantities - Breakfast	V-0400	There was no sign informing students of what they could take with each of the full breakfast meals.	Create clear signage to be posted during breakfast meal service that clearly informs students of what they can select with each of the breakfast meals. -Submit a copy of the signs -Submit a photo of the signs posted during breakfast meal service.
400 - Meal Components and Quantities - Lunch	V-0400	Field trip bagged lunches must meet the Age/ Grade specific meal pattern requirements. The <i>Field Trip Procedures</i> provide outlined the items included in the field trip bagged lunches and they do not meet the Meal Pattern requirement for grades 6-8 or 9-12.	Create and forward a recipe for a field trip bagged lunch meal that meets meal pattern requirements. Develop and forward a plan for ensuring that these meals meet food safety HACCP principles once taken off-site.
400 - Meal Components and Quantities - Lunch	V-0400	Chips and snacks were offered in the serving area and were not clearly labeled. A-la-carte items cannot be offered for sale in the same area where reimbursable meals are served without clear signs. bBeverages and snacks offerings must be clearly labeled with the individual price of each item.	Develop and submit the plan to ensure compliance with this regulation. Submit photos of the new signage and reconfiguration of the serving area, beverage offerings.

As a reminder, each issue cited in the finding summary report must be addressed by the district/school as part of corrective action. All findings have been entered into the CNP Online System Compliance Module. Corrective Action must be completed and submitted in the **Compliance Module** which is part of the Connecticut Online Application and Claiming System for the USDA Child Nutrition Programs. Also, once this has been completed by the district/school, an email notification must be sent to the lead reviewer indicating that the corrective action was completed and submitted for CSDE review and approval.

Additionally, Section 207 of the HHFKA amended section 22 of the NSLA (42 U.S.C. 1769c) to require State agencies to report the final results of the administrative review to the public in an accessible, easily understood manner in accordance with guidelines promulgated by the Secretary. The final rule at 7 CFR 210.18(m) requires the State agency to post a summary of the most recent final administrative review results for each DISTRICT on the State agency's publicly available website. Note the location on the CSDE Administrative Review Website will be forthcoming.

**Additional comments:**

It was a pleasure visiting the Regional School District #5 and it was evident throughout the Administrative Review that the school was well organized and prepared. This was an excellent review of Meal Access which includes: Certification, Benefit Issuance and Verification.

The school reviewed offered a variety of menu items for the students and the meals were well received. The cashiers did an excellent job in identifying reimbursable breakfasts and lunches and had a great rapport with the children. The Foodservice Director and Regional Dietitian did an excellent job in preparing the USDA Menu Worksheets for both the breakfast and lunch programs and the documentation reviewed supported compliance with the meal pattern requirements.

The Connecticut State Department of Education Child Nutrition recommends continue to explore offering breakfast in all three schools. Starting the day with a healthy school breakfast ensures that children have the nutrition they need to learn and thrive. A wide body of research supports the health and educational benefits of participation in the School Breakfast Program.

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The Child Nutrition Program (CNP) State Agency reviewer and the sponsor representative must sign and date this report at the exit conference. A copy must be made for the sponsor and the CNP reviewer retains the original. Note: You have the right to appeal any or all findings directly to the Connecticut State Department of Education.

State Reviewer, Child Nutrition Programs: Linn A. Brun Date: 2/28/20

Sponsor Representative: Theresa Lumas Date: 2/28/20

## Personnel -- Certified/Non-Certified

### Personnel Records

~~4112.6(a)~~  
~~4212.6~~

## ~~Personnel -- Certified/Non-Certified~~

### ~~Personnel Records~~

Personnel records shall be kept on all current employees and shall include information usually expected in good personnel administration.

A file shall be kept for all resigned or retired employees, including such essential information as shall seem appropriate to the administration as specified by state and federal laws.

The Superintendent, on behalf of the Amity Regional School District No. 5 (ARSD) Board of Education, shall notify an employee and a collective bargaining representative, if any, in writing when a request is made for disclosure of the employee's personnel, medical, or similar files, if the Superintendent reasonably believes disclosure would invade the employee's privacy.

The records will be disclosed, unless written objection is received from the teacher or employee's collective bargaining representative, within seven business days from the receipt by employee or collective bargaining representative.

~~Records of a teacher's performance and evaluation shall not be released without the written consent of the teacher. The records may be disclosed when the Superintendent does not believe such disclosure would legally constitute an invasion of privacy. The records in such a situation shall first be disclosed to the requester, followed within a reasonable time after disclosure, with the sending of a written or electronic copy or brief description of such request to the employee and any applicable collective bargaining representative. Disclosure shall only be considered an invasion of privacy where (1) such records do not pertain to a legitimate matter of public interest and (2) disclosure of such records would be highly offensive to a reasonable person.~~

Policy adopted: April 10, 2006 AMITY REGIONAL SCHOOL DISTRICT NO. 5  
Woodbridge, Connecticut

## Personnel -- Certified/Non-Certified

### Personnel Records

Records maintained or kept on file by the Board of Education that are records of a teacher's performance and evaluation shall not be released without the written consent of the teacher. Such records are not public records subject to Freedom of Information Act (FOI) (~~Freedom of Information Act~~).

Records maintained or kept on file by the Board, ~~which~~that are records of a teacher's personal misconduct, shall be deemed to be public records, and subject to disclosure under the ~~Freedom of Information Act~~FOI. Disclosure of such records of a teacher's personal misconduct shall not require the consent of the teacher.

All written materials shall be made available for inspection by the employee and a collective bargaining representative, if any involved, at an off-duty time in the presence of an administrator. Upon request, a professional employee will be provided a copy of supervisory records and reports maintained in said employee's personal file as a guide to evaluation of performance.

In accordance with ~~federal law~~the Every Student Succeeds Act (ESSA), the District shall notify parents at the beginning of each school year of their right to request ~~release~~ information regarding the professional qualifications and degrees of teachers and the qualifications of paraprofessionals ~~to parents/guardians upon request~~ for any teacher or paraprofessional who is employed by a school receiving Title I funds and who provides instruction to their child at that school. The District will provide such information on request in a timely manner. The District shall also provide notification to the parent/guardian of a child who has been assigned or has been taught for four or more consecutive weeks by a teacher not meeting applicable state certification at the grade level and subject area in which the teacher has been assigned.

Files containing medical information regarding an employee will be kept separate and confidential from other personnel files, and managed in compliance with ~~HIPPA~~Health Insurance Portability and Accountability Act (HIPAA).

**Personnel -- Certified/Non-Certified**

**Personnel Records**

~~4112.6(b)~~  
~~4212.6~~

~~**Personnel -- Certified/Non-Certified**~~

~~**Personnel Records**~~

Legal Reference: Connecticut General Statutes

1-206 Denial of access to public records or meetings.

1-213 Agency administration. Disclosure of personnel, birth and tax records.

1-214 Objection to disclosure of personnel or medical files (as amended by PA 18-93)

1-215 Record of arrest as public record

10-151a Access of teacher to supervisory records and reports in personnel file.

10-151c Records of teacher performance and evaluation not public records.  
(as amended by PA 02-138 and PA-13-122)

Perkins v. Freedom of Information Commission, 228 Conn. 158 (1993)

~~PL 107-110, No Child Left Behind Act, Sec. 1119-~~

~~The Americans with Disabilities Act~~

~~42 U.S.C. 1320d-1320d-8, P.L. 104-191, Health Insurance Portability and Accountability Act of 1996 (HIPAA)~~

Policy adopted: April 10, 2006

AMITY REGIONAL SCHOOL DISTRICT NO. 5  
Woodbridge, Connecticut

**Personnel -- Certified/Non-Certified**

**Personnel Records**

~~65 Fed. Reg. 50312-50372~~

~~65 Fed. Reg. 92462-82829~~

~~63 Fed. Reg. 43242-43280~~

~~67 Fed. Reg. 53182-53273~~

~~Section 1112( c)(6) The Every Student Succeeds Act (ESSA)~~

~~Section 1112( e)(1)(B) The Every Student Succeeds Act (ESSA)~~

~~Policy adopted: April 10, 2006 AMITY REGIONAL SCHOOL  
DISTRICT NO. 5  
Woodbridge, Connecticut~~

Policy adopted: April 10, 2006 AMITY REGIONAL SCHOOL DISTRICT NO. 5  
Woodbridge, Connecticut

**Students**

**Dress and Grooming**

**5132**

**Students**

**Dress and Grooming**

The [Amity Regional School District No. 5 \(ARSD\)](#) Board of Education's policy on student dress is a statement of principles, not of particulars:

Student dress shall be clean and neat; it shall not be disruptive to the educational process, nor shall it be detrimental to health and safety.

The administration shall have the responsibility for enforcing the above policy through judging each case of possible infraction on its own. In all other instances, students, in consultation with and with the approval of their parents, shall have responsibility for determining their own dress. Attire or grooming depicting or advocating violence, criminal activity, use of alcohol or drugs, profanity, pornography, or hate speech is prohibited.

School staff shall enforce the dress code consistently and in a manner that does not reinforce or increase marginalization or oppression of any group based on race, sex, gender identity, gender expression, sexual orientation, ethnicity, religion, cultural observance, household income, or body type/size.

School-directed changes to a student's attire or grooming should be the least restrictive and disruptive to the student's school day. Any school dress code enforcement actions should minimize the potential loss of educational time. Enforcement of the dress code shall be gender neutral.

Legal Reference: Connecticut General Statutes

10-221 Boards of education to prescribe rules

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Policy adopted: December 11, 2006 AMITY REGIONAL SCHOOL DISTRICT NO. 5  
Woodbridge, Connecticut

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Students

Dress and Grooming

~~Policy adopted: December 11, 2006 AMITY REGIONAL SCHOOL DISTRICT NO. 5~~  
~~Woodbridge, Connecticut~~

Policy adopted: December 11, 2006 AMITY REGIONAL SCHOOL DISTRICT NO. 5  
Woodbridge, Connecticut

## Mission-Goals-Objectives

### District Goals for Student Accomplishment

#### Expectations for Student Performance

To accomplish this mission, we are committed to developing creative skills and critical thinking in all of our students through the following learning expectations:

#### Academic

1. Students will demonstrate the ability to effectively read a range of texts with varying complexity.
2. Students will produce and distribute a variety of writing designed to entertain, inform, or argue, as well as build and present knowledge derived from research.
3. Students will speak and listen effectively in order to comprehend ideas and information, collaborate, and present knowledge and ideas to a variety of audiences.
4. Students will demonstrate a command of language convention through effective use of language in writing and speaking, and through the acquisition and use of domain-specific and academic vocabulary.
5. Students will make sense of problems and persevere when solving them.
6. Students will use appropriate tools strategically to solve problems.

#### Social

7. Students will respect the rights, property, and opinions of others.
8. Students will regularly give to others unselfishly and be considerate and kind to all.
9. Students will be aware of, and concerned for, the feelings of others and deal with others in a kind and sympathetic manner.
10. Students will demonstrate an ability and commitment to work collaboratively with others.

#### Civic

11. Students will exhibit personal integrity and ethical decision-making.
12. Students will demonstrate social responsibility for the school environment by recognizing the impact of their decisions on others and themselves.
13. Students will participate in meaningful activities within the school community.
14. Students will demonstrate an awareness of their global responsibility to others and the environment.

#### Career

15. Students will possess the knowledge and skills necessary to pursue the future of their choice and function effectively in various life roles.

Legal References: Connecticut General Statutes

## Mission-Goals-Objectives

[10-4\(c\) Duties of board. Reports. Comprehensive plan for elementary, secondary, vocational, career and adult education.](#)

[10-220\(b\) Duties of boards of education as amended by PA 19-58.](#)

[Amity Regional Senior High School Student/Parent Handbook, 2015-16 p.9.](#)

## Business and Non-Instructional Operations

### Medical Reimbursement for Special Education Students

The Amity Regional School District No. 5 (ARSD) Board of Education (~~Board~~) will seek Medicaid reimbursement for eligible medically related services\* provided to Medicaid eligible special education students in accordance with federal and state law. The Board shall enroll as a provider in the state medical assistance program, participate in the Medicaid School Based Child Health (SBCH) Program administered by the Department of Social Services, and submit billable service information electronically to the Department of Social Services, or its billing agent.\* The Board may enter into an agreement with a third party or another board of education to comply with these requirements. The Board realizes that such third-party vendor agreements to provide that cost for the above services are paid from, and are contingent on receipt of sufficient funds from, grants the Department of Social Services makes to boards of education based on Medicaid claims for special education services provided to District students.

~~\*Optional:~~ The Board of Education, ~~having a student population of less than one thousand students,~~ may conduct a cost benefit analysis in a form prescribed by the Commissioner of Social Services to determine whether the cost to participate in the medical assistance program exceeds the revenue that would be generated for the Board. The Board, if exempted from the requirements of this policy after such cost benefit analysis, shall complete and submit such analysis to the Commissioner of Social Services every three years in order to remain exempt.

~~Note: The Commissioner of Social Services is required by September 1, 2018 to develop a cost benefit analysis model and to also determine the feasibility of directly certifying students as eligible for Medicaid on behalf of Boards of Education.~~

The Board of Education, will obtain one-time parental consent and provide annual written notification to the parent/guardian of the student before accessing the student's or parent's or guardian's public benefits or insurance. - The Board as required, will determine a child's Medicaid enrollment status, ~~and will provide written notification to the parent/guardian of the student before accessing the student's or parent's or guardian's public benefits or insurance for the first time and prior to the one-time parental or guardian consent and annually thereafter.~~

The Board of Education will provide written notification to all parents and guardians of children who are Medicaid eligible and currently receiving SBCH School Based

## Business and Non-Instructional Operations

### Medical Reimbursement for Special Education Students

~~Child Health (SBCH)~~ services under an individualized education plan (IEP) prior to obtaining parental consent and prior to the continuation of billing Medicaid for the services. The Board will obtain parental consent from all parents and guardians who are Medicaid eligible and receiving SBCH services under an IEP; in order to access their public benefits or insurance to pay for services under the Individuals with Disabilities Act (IDEA).~~IDEA.~~

*~~\*Note: Districts can bill for health related services that are outlined in the student's IEP. In general, services for which a school district may bill Medicaid are: audiologist services, evaluation and testing, nursing services, occupational therapy, physical therapy, speech therapy, psychological services and social work services.~~*

Legal Reference: Connecticut General Statutes

10-76d Duties and powers of boards of education to provide special education programs and services. State agency placements; apportionment of costs. (as amended by June 2017 Special Session PA

17-2, Sec. 51 and PA 18-182)

42 CFR Parts 431, 433 and 440, Medicaid Program; Elimination of Reimbursement Under Medicaid for School Administration Expenditures and Costs Related to Transportation of School-Age Children Between Home and School

5.299, The Medicare, Medicaid & SCHIP Extension Act of 2007

34 C.F.R. §300.154(d) - Individuals with Disabilities Act (IDEA)-Part B, related to parental consent to access public benefits or insurance

**Policy adopted:**

*Optional.*

## Business/Non-Instructional Operations

### Budget & Expense Report/Annual Financial Statement

The Superintendent of Schools shall submit to the Amity Regional School District No. 5 (ARSD) Board of Education a monthly report of disbursements and budget balances at the regular meeting each month, and shall submit an annual report covering the preceding school year.

Each fiscal year the Board of Education (~~Board~~) shall annually make available on its Internet website the aggregate spending on salaries, employee benefits, instructional supplies, educational media supplies, instructional equipment, regular education tuition, special education tuition, purchased services, and all other expenditure items, excluding debt service, for each school under the jurisdiction of the Board of Education.

~~Beginning with the fiscal year starting July 1, 2019 and each fiscal year thereafter, t~~The Board shall, on a quarterly basis, post the Board's current and projected expenditures and revenues on the ~~district's-District's~~ website. In addition, the Board will submit a copy of such current and projected expenditures and revenues to the town's legislative body, or in a municipality in which the legislative body is a town meeting, to the Bethany, Orange, and Woodbridge Boards of Selectmen.

(cf. 3430 – Periodic Financial Reports)

Legal Reference: Connecticut General Statutes

10-222 Appropriations and budget.

P.A. 13-247 An Act Implementing Provisions of the State Budget for the Biennium Ending June 30, 2015 Concerning General Government, Section 192.

PA 19-117, Section 290

Policy adopted:

rev 10/13

rev 7/19

## Students

### Homeless Students

The **Amity Regional School District No. 5 (ARSD)** Board of Education shall make reasonable efforts to identify homeless children and youths within the district, encourage their enrollment in school, and eliminate existing barriers to their education, which may exist in ~~district~~-District policies or practices, in compliance with all applicable federal and state laws.

#### Optional Language:

The ~~District~~ **ARSD** administration shall attempt to remove existing barriers to school attendance by homeless children and youth, **homeless emancipated minors, and homeless youth eighteen years of age**, which may include:

1. Records – The selected school for the homeless student shall enroll the child or youths even in the absence of records normally required for enrollment. The last school in which the student was enrolled shall be contacted to obtain records.
2. Other enrollment requirements that may constitute a barrier to the education of the homeless child or youth may be waived at the discretion of the Superintendent.
3. ~~Grade~~-**Grade-Level Placement – If the District is unable to determine the student's grade level due to missing or incomplete records, the District shall administer tests or utilize other reasonable means to determine the appropriate grade level for the child.**
4. Fees and charges, which may present a barrier to the enrollment or transfer of a homeless child or youth, shall be waived.
5. Transportation services must be comparable to those provided to other students in the selected school. Transportation shall be provided to the student's school of origin in compliance with federal and state regulations. **If the school of origin is in a different school district from where the homeless child or youth is currently living, both school districts shall agree on a method for sharing the responsibility and costs; or share the costs equally.**
6. Official school records, policies, and regulations shall be waived at the discretion of the Superintendent, in compliance with federal and state regulations.
7. Immunization Records – The District shall make a reasonable effort to locate immunization records from information available. The District's liaison shall assist the parent/guardian in obtaining the necessary immunizations and records. The District shall arrange for students to receive immunizations through health agencies and at District expense, if no other recourse is available. Immunizations may, however, be waived for homeless youth only in accordance with provisions of Board of Education policy on immunizations.
8. Other barriers to school attendance by homeless children or youth may be waived at the discretion of the Superintendent of Schools.
9. The District will treat information about a homeless child or youth's living situation as a student education record subject to the protections of the Family Educational Rights and Privacy Act (FERPA). Such information shall not be deemed to be directory information.

Further, it is the policy of the Board of Education that no child or youth shall be discriminated against or stigmatized in this school district because of homelessness. Homeless students, as defined by federal and state statutes, residing within the ~~district~~-District or residing in temporary shelters in the ~~district~~-District are entitled to free school privileges.

Homeless students shall not be separated from the mainstream school environment on the basis of their homelessness. Such students shall have access to education and other services they need to meet the same challenging State academic standards to which all students are held.

Homeless students within the ~~district~~District not placed in a shelter remain the ~~district's~~District's responsibility to provide continued educational services. Such services for the child may be:

1. continued in the school ("school of origin") that the student attended when permanently housed or the school of last enrollment; or
2. provided in the school that is attended by other students living in the same attendance area where the homeless child lives.

To the extent feasible, a homeless child will be kept in the school of origin, unless it is against the wishes of the parent/guardian. ~~If placement in the school of origin is not feasible, the homeless student must be placed in the school that is attended by other students living in the same attendance area in which the homeless child lives.~~

The District will provide a written explanation, including the right to appeal, whenever the District sends a homeless student to a school other than the school of origin, a school requested by the parent/guardian or unaccompanied youth.

Homeless children shall be provided educational services that are comparable to those provided to other students enrolled in the District, including but not limited to: ~~;~~ Title I, transportation services, compensatory educational programs, gifted and talented, special education, ESL, health services, and food and nutrition programs, ~~and preschools operated by the District,~~ **if they meet the established criteria for these services.**

~~The Superintendent of Schools shall refer identified homeless children under the age of eighteen who may reside within the school district, unless such children are emancipated minors, to the Connecticut Department of Children and Families (DCF).~~

~~The district administration shall attempt to remove existing barriers to school attendance by homeless emancipated minors and youth eighteen years of age:~~

- ~~1. The selected school for the homeless child shall enroll the child, even in the absence of records normally required for enrollment. The last school enrolled shall be contacted to obtain records.~~
- ~~2. Other enrollment requirements that may constitute a barrier to the education of the homeless child or youth may be waived at the discretion of the Superintendent. If the district is unable to determine the student's grade level due to missing or incomplete records, the district shall administer tests or utilize other reasonable means to determine the appropriate grade level for the child.~~
- ~~3. Fees and charges, which may present a barrier to the enrollment or transfer of a homeless child or youth, may be waived at the discretion of the Superintendent.~~
- ~~4. Transportation services must be comparable to those provided other students in the selected school. Transportation shall be provided to the student's school of origin in compliance with federal and state regulations.~~
- ~~5. Official school records policies and regulations shall be waived at the discretion of the Superintendent, in compliance with federal statutes.~~
- ~~6. The district shall make a reasonable effort to locate immunization records from information available. The District's liaison shall assist the parent/guardian in obtaining the necessary immunizations and records. The District shall arrange for students to receive immunizations through health agencies and at District expense if no other recourse is available. Immunizations may, however, be waived for homeless youth only~~



~~in accordance with provisions of Board of Education policy on immunizations.~~

~~7. The Board will provide any homeless student, who is not in the physical custody of a parent/guardian, full access to his/her educational records, including medical records, in the Board's possession.~~

~~8. Other barriers to school attendance by homeless children or youth may be waived at the discretion of the Superintendent of Schools.~~

Any homeless child or youth denied school accommodations shall continue in attendance or be immediately enrolled in the school selected by the child in the school district. The homeless child or youth or the parent/guardian of such homeless individual shall be provided with a written explanation of the reasons for the denial of accommodations in a manner and form understandable to such homeless child or youth or parent/guardian. Information shall also be provided regarding the right to appeal the decision of the denial of accommodations. The homeless child or youth shall be entitled to continue in attendance in the school district during all available appeals.

In addition, if a homeless child or youth is denied school accommodations, such homeless child or youth shall be entitled to a hearing conducted pursuant to C.G.S. 10-186.

The District's educational liaison for homeless children is the Director of Pupil Services. The liaison must assist homeless children and youth, as described within the administrative regulations, in the placement/enrollment decisions, considering the youth's wishes, and provide notice of appeal under the Act's enrollment disputes provisions. The liaison shall also participate in ~~State~~ State-provided professional development programs for local liaisons.

Students residing in a temporary shelter are entitled to free school privileges from the district in which the shelter is located or from the school district where they would otherwise reside if not for the placement in the temporary shelter. The district in which the temporary shelter is located shall notify the district where the student would otherwise be attending. The district so notified may choose to either:

1. continue to provide educational services, including transportation between the temporary shelter and the school in the home district; or
2. pay tuition to the district in which the temporary shelter is located.

The Superintendent shall develop regulations, to ensure compliance with applicable statutes in the implementation of this policy.

(cf. 5143 - Student Health Assessments and Immunizations)

(cf. 5146 - Child Abuse and Neglect)

Legal Reference: Connecticut General Statutes

4-176e to 4-180a Agency hearings.

4-181a contested cases. Reconsideration. Modifications.

10-186 Duties of local and regional boards of education re school attendance. Hearings. Appeals to state board. Establishment of hearing board. Readmission. Transfers. (as amended by PA 19-179)

10-253(e) School privileges for children in certain placements, non-resident children and

children in temporary shelters. (as amended by PA 17-194)

[17a-101](#) Protection of children from abuse. Reports required of certain professional persons. When child may be removed from surroundings without court order.

[17a-103](#) Reports by others.

[17a-106](#) Cooperation in relation to prevention, identification and treatment of child abuse and neglect.

[46b-120](#) Definitions.

PA 17-194 An Act Concerning Access to Student Records for Certain Unaccompanied Youths.

PA 19-179 An Act Concerning Homeless Students' Access to Education

McKinney-Vento Homeless Assistance Act, (PL 107-110-Sec 1032) 42 U.S.C. §11431-11435, as amended by the ESSA, P.L. 114-95.

Federal Register: McKinney-Vento Education for Homeless Children and Youths Program, Vol. 81, No. 52, 3/17/2016.

Federal Family Educational Rights and Privacy Act of 1974 (section 438 of the General Education Provisions Act, as amended, added by section 513 of P.L. 93-568, codified at 20 U.S.C. 1232g.)

Dept. of Educ. 34 C.F.R. Part 99 (May 9, 1980 45 FR 30802) regs. Implementing FERPA enacted as part of 438 of General Educ. Provisions Act (20 U.S.C. 1232g) parent and student privacy and other rights with respect to educational records, as amended 11/21/96, and Final Rule 34 CFR Part 99, December 9, 2008, December 2, 2011.

**Policy adopted:**

*An optional policy outlining the legal requirement of ESSA pertaining to mandated school and district report cards and State statutes pertaining to Profile and Performance Reports.*

## **Students**

### **Reporting to Parents**

#### **District/School Report Cards**

To provide pertinent information regarding the academic performance of the Amity Regional School District No. 5 and its schools, the ARSD Board of Education shall annually develop and publicly disseminate a district report card and report cards for the individual schools, the Profile and Performance Report, in accordance with federal and state laws and regulations.

~~The Board, at its discretion, may include additional information not required by law on the district's Profile and Performance Report.~~

#### **District Report Cards**

~~District report cards and the Profile and Performance Report shall contain the following information:~~

- ~~1. Aggregate data on student achievement on state academic assessments in reading/language arts, mathematics, and science and disaggregated data reflecting race, ethnicity, gender, disability, migrant status, English proficiency and status as economically disadvantaged, via the District Performance Index (DPI).~~
- ~~2. Comparison of above student groups regarding achievement levels on state assessments.~~
- ~~3. Information on district data pertaining to percent of students in grades 4 and 8, who tested at each NAEP achievement level (below basic, basic, proficient and advanced) disaggregated by major racial and ethnic groups, students with disabilities, English learners and economically disadvantaged students on the National Assessment of Educational Progress (NAEP).~~
- ~~4. District Performance Index trend data in achievement disaggregated reflecting race, English Learners, status as economically disadvantaged, disabled, high needs and district total.~~
- ~~5. Extent of use of alternate assessments for students with the most significant cognitive disabilities. (number and percentage of students, by grade and subject)~~
- ~~6. Number and percentage of recently arrived English learners exempted from one administration of the reading/language arts assessments or whose results are excluded from certain state accountability system indicators.~~
- ~~7. Percentage of students in grades 4, 6, 8, 10 meeting or exceeding the "Health Fitness Zone Standard" on the Connecticut Physical Fitness Assessment (CPFA); also compared to state results.~~
- ~~8. Graduation rates for secondary schools, disaggregated by student groups, tabulated as a four year cohort and also as an extended six year cohort graduation rate.~~

## Students

### Reporting to Parents

#### District Report Cards (continued)

9. ~~Information on district's performance and the number, percentage and names of schools identified for improvement, including how long they have been so identified.~~
10. ~~Progress toward state designed long term goals for academic achievement, graduation rates and English learners achieving English language proficiency disaggregated by major racial and ethnic groups, disabilities, English learners, and economically disadvantaged students.~~
11. ~~Enrollment data, as of October 1, disaggregated by gender, race, ethnicity, English proficiency, disabilities and status as economically disadvantaged.~~
12. ~~Number and percentage of students enrolled in preschool, disaggregated by major racial and ethnic groups, disabilities, English learners and gender.~~
13. ~~Attendance and discipline data, in the categories of chronic absenteeism (excused and unexcused) and suspensions/expulsions disaggregated by gender, race, ethnicity, English proficiency, disabilities and status as economically disadvantaged. (in school suspensions, out of school suspensions, expulsions, school related arrests, referrals to law enforcement, incidents of violence) Percentage of students assessed and not assessed on state academic assessments, (participation rates) (Disaggregated by all, racial and ethnic groups, children with disabilities, English learners, economically disadvantaged, gender, and migrant status)~~
14. ~~Participation rates for students with disabilities and for English learners on the NAEP.~~
15. ~~Data pertaining to percentage of 9<sup>th</sup> graders earning at least five full year credits in the year and no more than one failing grade in English, Mathematics, Science or Social Studies.~~
16. ~~Percentage of students in grades 9 through 12 participating in at least one dance, theater, music or visual arts course in the school year.~~
17. ~~Comparison of district students' achievements on state assessments to students in the state as a whole.~~
18. ~~Data on educator qualifications, disaggregated by high and low poverty schools; the number and percentage of:~~
  - ~~a. inexperienced teachers, principals, and other school leaders;~~
  - ~~b. teachers teaching with emergency and provisional credentials;~~
  - ~~c. teachers who are not teaching in the subject field for which the teacher is certified or licensed.~~~~(Note: SEA required to define "inexperienced")~~
19. ~~Classroom teacher attendance citing average number of days absent due to illness or personal time within district and compared to state average.~~

## Students

### Reporting to Parents

#### District Report Cards (continued)

20. ~~Data pertaining to staff, including full-time equivalent count of teachers, instructors and paraprofessionals in general education and special education; administrators, coordinators and department chairs at the central office level and school level; library staff; instructional specialist who support teachers; counselors, social workers and psychologists; school nurses; and other staff providing support and non-instructional services.~~
21. ~~Information about efforts to reduce racial, ethnic and economic isolation.~~
22. ~~Special education data including identification rates by primary disability, achievement data, and number of students placed out of district in public schools in other districts or private schools or other settings.~~
23. ~~Information about school district improvement plans and parental outreach activities.~~
24. ~~Information about the equitable allocation of resource among district schools.~~
25. ~~Number and percentage of students enrolled in accelerated course work (e.g., AP, IB) disaggregated by major racial and ethnic groups, disabilities, English learners and gender.~~
26. ~~Data pertaining to college entrance and persistence by District and disaggregated by gender, race, English proficiency, status as economically disadvantaged.~~
27. ~~Data pertaining to overall expenditures, special education expenditures and percent of expenditures by source.~~
28. ~~Data pertaining to per-pupil expenditures (actual personnel and actual non-personnel) for the District and for each school, disaggregated by the source of funds (Federal, State and local), including, but not limited to, expenditures for administration, instruction, instructional support, student support services, pupil transportation services, operations and maintenance of plant, fixed charges, preschool, net expenditures to cover deficits for food services and student body activities, and any additional current expenditure categories designated by the State Department of Education, which may not include community services, capital outlay or debt service.~~
- ~~— Data pertaining to percentage of students in grades 11 and 12 achieving benchmark scores on at least one of the following: Smarter Balanced 11<sup>th</sup> or SAT, or ACT or AP or IB.~~
29. ~~Data pertaining to students in grades 11 and 12 participating in at least one of the following during high school—two courses in AP/IB dual enrollment, or two courses in one of seventeen CTE (Career Technical Education) categories or two workplace “courses” in any area.~~
30. ~~Data pertaining to students with disabilities who spend 79.1 to 100 percent of time with non-disabled peers.~~
31. ~~Statistics from Connecticut’s “Next Generation Accountability System” which is based on a broad set of 12 indicators. (Accountability Index)~~

## **Students**

### **Reporting to Parents (continued)**

#### **School Report Cards**

~~School report cards shall contain the following information:~~

- ~~1. Same information contained on the district report card.~~
- ~~2. Whether the school has been identified for improvement.~~
  - ~~• Amount of school improvement funds received~~
  - ~~• Types of strategies implemented by the school~~
- ~~3. Information that compares the school's students' achievement on state assessments to students in the district and the state as a whole.~~

The Superintendent or designee shall be responsible to ensure:

1. Required information is annually updated and posted.
2. District report card and school report cards are provided to parents in an understandable and uniform format and, to the extent practicable, in a language the parents can understand.
3. District and school report cards are made available to the public through posting on the Internet, distribution to the media, and distribution to public agencies.
4. Public access is provided to the state report card and the school profile maintained by the state.

Legal Reference: Connecticut General Statutes

10-220(c) Duties of boards of education

PA 06-167 An Act Concerning Parental Involvement Reporting in School Profiles)

Policy adopted:

rev 7/09

rev 1/15

rev 2/18



## **Students**

### **Student Health Services**

#### **School District Medical Advisor**

The Amity Regional School District No. 5 (ARSD) Board of Education (~~ARSD~~) (Board) shall appoint a school district medical advisor and appropriate medical support service personnel including nurses.

The school district medical advisor, in cooperation with the Board and the board of health/health department for the school district, shall:

1. Plan and administer each school's health program;
2. Advise on the provision of school health services;
3. Provide consultation on the school health environment; ~~and~~
4. Perform any other duties as agreed between the advisor and the appointing board of education.

School health efforts shall be directed toward detection and prevention of health problems and to emergency treatment, including the following student health services:

1. Appraising the health status of student and school personnel;
2. Counseling students, parents, and others concerning the findings of health examination;
3. Encouraging correction of defects;
4. Helping prevent and control disease;
5. Providing emergency care for student injury and sudden illness;
6. Maintaining school health records.

#### **Health Records**

There shall be a health record for each student enrolled in the school district, which will be maintained in the school nurse's room. For the purposes of confidentiality, records will be treated in the same manner as the student's cumulative academic record.

Student health records are covered by the Family Educational Rights and Privacy Act (FERPA) and are exempt from the Health Insurance Portability Act (HIPAA) privacy rule. However, it is recognized that obtaining medical information from health care providers will require schools to have proper authorization and to inform parents that such information, once released by health care providers, is no longer protected under HIPAA but is covered under FERPA.

#### **Regular Health Assessments**

Health assessments shall be required in grade 7 and in grade 10 by a legally qualified practitioner of medicine, an advanced practiced registered nurse, licensed pursuant to C.G.S. Chapter 378, a physician assistant, licensed pursuant to C.G.S. Chapter 370, a school medical advisor, or a legally qualified practitioner of medicine, ~~as an~~ advanced practice registered nurse or a physician assistant

## Students

### Student Health Services

stationed at any military base prior to school entrance in Connecticut. The purpose of the health assessment is to ascertain whether a student has any physical disability or other health problem. Such health assessments shall include:

1. Physical examination, which shall include hematocrit or hemoglobin tests, height, weight, ~~and~~ blood pressure, and a chronic disease assessment which shall include, but not be limited to, asthma
2. Updating of immunizations required under C.G.S. 10-204a and the Department of Public Health, Public Health Code, 10-204a-2a, 10-204-3a and 10-204a-4;
3. Vision, hearing, postural, and gross dental screenings;
4. If required by the current medical standard, testing for tuberculosis and sickle cell anemia or Cooley's anemia;
5. Any other information including a health history ~~as that~~ the physician believes to be necessary and appropriate.

A child will not be allowed, as the case may be, to begin or continue in ~~district~~ District schools unless health assessments are performed as required. Students transferring into the ~~district~~ District must provide evidence of required Connecticut vaccinations, immunizations, and health assessments at enrollment and prior to school attendance.

~~Health assessments will be arranged without charge to all students whose parents or guardians meet the eligibility requirement of free and reduced priced meals under the National School Lunch Program or for free milk under the special milk program.~~

The ~~Amity~~ ARSD Board of Education shall annually designate a representative to receive reports of health assessments and immunizations from health care providers.

Health assessment results and recommendations signed by the examining physician or authorized medical personnel shall be recorded on forms provided by the Connecticut State Board of Education and kept on file in the school the student attends. Upon written authorization from the student's parent or guardian, original cumulative health records shall be sent to the chief administrative officer of the school district to which such student moves (or his/her designee) and a true copy of the student's cumulative health records maintained with the student's academic records. The Superintendent of Schools, or designee, shall notify parents of any ~~health~~ health-related problems detected in health assessments and shall make reasonable efforts to assure that further testing and treatment is provided, including advice on obtaining such required testing or treatment.

Students who are in violation of Board requirements for health assessments and immunizations will be excluded from school after appropriate parental notice and warning.

## Students

### Student Health Services

#### Postural Screening

School nurses will screen all female students in grade 7 and male students in grade 8 or 9 for scoliosis or other postural problems. Additional postural screenings will also be conducted in response to appropriate requests from parents/guardians or professionals working with the student. Results will be recorded in the student's health record on forms supplied by the Connecticut State Board of Education, and the Superintendent shall cause a written notice to be given to the parent or guardian of each student found to have any postural defect ~~of or~~ problem, with a brief statement describing such defect or disease.

As necessary, special educational provisions shall be made for students with disabilities.

#### Tuberculin Testing

~~NOTE: The Connecticut Department of Public Health discourages routine tuberculosis (TB) (tuberculosis) testing of all students at school enrollment or for any of the required health assessment.~~ It ~~is recommended~~ is required that students, at each mandated health assessment, be screened for their risk of exposure to tuberculosis (TB). ~~A child,~~ determined to be at risk for exposure to TB should be required to be tested.

~~In addition to tuberculin testing, if required by the school district medical advisor, as part of regular student health assessments, all new students will be required to have at least one test for tuberculosis prior to entry in district schools, if determined to be at risk for exposure to TB.~~

#### Immunizations/Vaccinations

No student will be allowed to enroll in ~~district~~ District schools ~~without~~ ~~without~~ without ~~vaccination against smallpox and~~ adequate immunization against the following diseases:

1. Measles
2. Rubella
3. Poliomyelitis
4. Diphtheria
5. Tetanus
6. Pertussis
7. Mumps
8. Hepatitis B
9. Varicella (Chickenpox)
- ~~9.~~
10. Meningococcal disease
11. Any other vaccine required by section 19a 7f of Connecticut General Statutes.

All students in grades 7-12 are required to have received 2 doses of measles, mumps, and rubella vaccine, or demonstrate serologic proof of immunity. Students entering seventh grade shall

## **Students**

### **Student Health Services**

show

## Students

### Student Health Services

proof of having received 2 doses of varicella vaccine, laboratory confirmation of immunity, or present a written statement signed by a physician, physician assistant, or advanced practice registered nurse indicating the individual has had varicella based on family or medical history. (Varicella requirement effective August 1, 2011)

All seventh grade students must show proof of 1 dose of meningococcal vaccine and 1 dose of Tdap, in addition to the completion of the primary DTP series.

All students in grades 7-12 are required to have 3 doses of Hepatitis B vaccine or serologic evidence of immunity.

Beginning with the 2019-2020 school year all incoming seventh grade students must show proof of 2 doses of Hepatitis A vaccine.

Students shall be exempt from the appropriate provisions of this policy when:

1. they present a certificate from a physician or local health agency stating that initial immunizations have been given and additional immunizations are in process under guidelines and schedules specified by the Commissioner of Health Services; or
2. they present a certificate from a physician stating that in the opinion of such physician, immunization is medically contraindicated because of the physical condition of such child; or
3. they present a written statement from their parents or guardians that such immunization would be contrary to the religious beliefs of such child or his/her parents/guardians; -- such statement to be officially acknowledged by a notary public or a judge, a court clerk/deputy clerk, a town clerk, a justice of the peace, or a Connecticut attorney; or
- 3.4. in the case of measles, mumps, or rubella, present a certificate from a physician, physician assistant, or advanced practice registered nurse or from the Director of Health in such child's present or previous town of residence, stating that the child has had a confirmed case of such disease; or
5. in the case of hemophilus influenza type B has passed his or her fifth birthday; -or
- 4.6. in the case of diphtheria, tetanus, and pertussis, has a medical exemption confirmed in writing by a physician, physician assistant or advanced practice registered nurse (per C.G.S. 19a-7f).

The school nurse will report to the local director of health any occurrence of State of Connecticut defined reportable communicable diseases.

### Health Assessments/Interscholastic Sports Programs

Any student participating in an interscholastic sports program must have a health assessment, ~~within the past thirteen months prior to the first training session for the sport or sports.~~ Each

## Students

### Student Health Services

participant in a sport program must complete a health questionnaire prior to their health assessment.

Completed physical examination forms, or copies of, must be on file in the Health Office of the high school or middle school prior to the first tryout/practice session. The physical examination is valid for 13 months and must cover the athlete for the entire sport season (including the tryout period), as specified by the Connecticut Interscholastic Athletic Conference (CIAC). Physicals cannot expire during the season. The ARSD will annually post the dates for eligible physicals. A parent/guardian may submit an appeal to the Athletic Department in writing, if the last competition of the sports season is scheduled prior to 13 months from the posted physical eligibility date. Physical examinations performed by a parent who is a medical professional will not be accepted.

~~Parents are expected to use the services of their private physician. If a student is unable to obtain a health assessment from his/her personal physician for financial or other reasons, an examination can be arranged. Health assessment results shall be recorded on forms provided by the Connecticut State Board of Education, signed by the examining physician, filed in the~~

## **Students**

### **Student Health Services**

~~student's health folder, and maintained up to date by the school nurse.~~

### **Student Medical Care at School**

#### **Student Medical Care at School**

School personnel are responsible for the immediate care necessary for a student whose sickness or injury occurs on the school premises during school hours or in ~~school~~school-sponsored and supervised activities.

Schools shall maintain files of Emergency Information cards (on paper or electronically) for each student. If a child's injury requires immediate care, the parent or guardian will be called by telephone by the nurse, the building Principal, or other personnel designated by the Principal, and advised of the student's condition. When immediate medical or dental attention is indicated, and when parents or guardians cannot be reached, the student will be transported to the nearest hospital. ~~In this event,~~ the family physician/dentist and school district medical advisor will be notified of school district actions at the discretion of the school nurse.

(cf. 5125.11 – Health/Medical Records HIPAA)

(cf. 5142 - Student Safety)

(cf. 5143 – Health Assessments & Immunizations)

(cf. 5141.4 - Child Abuse and Neglect)

(cf. 5141.5 - Suicide Prevention)

(cf. 6142.1 – Family Life and Sex Education)

(cf. 6145.2 - Interscholastic/Intramural Athletics)

(cf. 6171 - Special Education)

Legal Reference: Connecticut General Statutes

10-203 ~~03~~ Sanitation-

~~10-204~~ ~~04~~ Vaccination-

10-204a Required immunizations (as amended by PA 15-174 and PA 15-242)

Policy adopted: January 11, 2016

AMITY REGIONAL SCHOOL DISTRICT NO. 5  
Woodbridge, Connecticut

## **Students**

### **Student Health Services**

10-204~~04~~c Immunity from liability

10-205 ~~05~~ Appointment of school medical advisors.

~~10-206~~ ~~10-206~~ Health assessments, as amended by PA 07-58 and PA

11-179 and PA 18-168

~~10-206~~ 10-206a Free health assessments.



## **Students**

### **Student Health Services**

10-207 Duties of medical advisers, (as amended by P.A. 12-198)

~~10-207~~ 10-208 Exemption from examination or treatment.

10-208a Physical activity of student restricted; boards to honor notice.

~~10-208~~ 10-209 Records not to be made public (as amended by PA 03-211):-

10-210 Notice of disease to be given parent or guardian:-

10-212 School nurses and nurse practitioners:-

10-212a Administration of medicines by school personnel:-

~~10-213 Dental hygienists.~~

10-214 Vision, audiometric and postural screenings: When required; notification of parents re defects; record of results (as amended by PA 96-229 An Act Concerning Scoliosis Screening):-

10-214a Eye protective devices.

10-214b Compliance report by local or regional Board of Education.

10-217a Health services for children in private nonprofit schools. Payments from the state, towns in which children reside and private nonprofit schools.

Department of Public Health, Public Health Code – 10-204a-2a, 10-204a-3a, and 10-204a-4

## **Students**

### **Student Health Services**

~~19a-7f Childhood Immunization Schedules~~

Federal Family Educational Rights and Privacy Act of 1974 (section 438 of the General Education Provisions Act, as amended, added by section 513 of P.L. 93-568, codified at 20 U.S.C. 1232g)

42 U.S.C. 1320d-1320d-8, P.L. 104-191, Health Insurance

Portability and Accountability Act of 1996 (HIPAA)

~~PA 18-168 An Act Concerning the Department of Public Health's~~

~~Recommendations Regarding Various Revisions to the Public Health~~

~~Statutes Sections 7-9, 539, & 540~~

## Students

### Student Safety

The Amity Regional School District No. 5 (ARSD) Board of Education (~~Board~~) shall strive to build safe, supportive, and academically challenging school learning environments in partnership with students, staff members, and families. The Board shall develop and adopt a mission statement that includes promotion of es a safe and secure environment for learning. ~~Such mission statement shall emphasize respect, caring, and high-academic achievement.~~

The Board shall ensure that all facilities, grounds, equipment, and vehicles meet acceptable injury and violence prevention standards for design, installation, use and maintenance.

Student safety shall be a priority of all school district personnel through close supervision of students in all school buildings and grounds and through special attention to:

1. Maintenance of safe school environments through conducting regular safety vulnerability and hazard assessments of all school facilities, school grounds, and sports-related equipment ~~and vehicles used to transport students~~. Security and vulnerability assessments shall be conducted every two years, resulting in a school safety plan for each school, based upon the assessment results.
2. Safe practices by school personnel and students – particularly in instructional areas or in extracurricular activities presenting special hazards.
3. Development of school programs and activities consistent with appropriate abilities and limitations of students at each age level.
4. Offering safety education to students germane to particular subjects, such as laboratory courses in science, industrial arts, and health and physical education.
5. Appropriate first aid care for students in case of accident or sudden illness.
6. Adequacy of emergency response procedures at each school in the District (first aid, cardiopulmonary resuscitation, infection control security).
7. Development, adoption, and implementation of a code of conduct and other appropriate rules that are designed to promote health and safety and prevent unintended injury, harassment, bullying, and other forms of violence. Such code shall prohibit the use and possession of alcohol, tobacco, and other drugs and weapons and dangerous instruments at school.
8. ~~Training exercises~~ Professional learning for all school staff designed to help them maintain a positive climate for learning and to effectively enforce safety and discipline rules.
9. Requiring the District and its individual schools to have safety and security plans which serve as a guide to address the various safety needs in the school, such as lockdown procedures, evacuations, drills and safety protocols, and personnel assignments. The school security and safety plan for each of the District's schools shall annually be submitted to the Department of Emergency Services and Public Protection.
10. Conducting regular audits (at least annually) to evaluate and analyze the effectiveness of each school's safety and security plans. First responders, local law enforcement, and the entire school community shall be involved in this process. Law enforcement and local public safety officials shall evaluate all fire and crisis response drills.

11. Communicating with parents/guardians and community members about school-level emergency preparedness protocols to the greatest extent possible.
12. Providing regular training for all school employees on the Districts' school emergency management systems and protocols, as well as violence prevention training.
13. Creating a partnership between schools, local law enforcement, and appropriate community agencies, including mental health, to prevent and reduce school violence.
14. Establishing a school security and safety committee at each school. Such committee shall be responsible for assisting in the development of the school's security and safety plan and administering such plan.
15. Assistance of the safe school climate committee at each school, originally established to address issues related to bullying in the school, to also collect, evaluate, and report information relating to instances of disturbing or threatening behavior that may not meet the statutory definition of bullying.

*Optional language:*

~~The Board shall establish an advisory committee to review specific policies, regulation, plans and procedures in order to ensure a comprehensive and effective program to increase student and staff awareness of safety and health issues and to review emergency response procedures at each school in the district. Members of the safety committee shall include a Board member, the Superintendent of Schools or his/her designee, appropriate school personnel, a high school student, parents, law enforcement personnel, first responders and other community representatives. All members shall be appointed by the Board.~~

**Firearm Safety Program**

~~The Board may/shall offer a firearm safety program to students in grades kindergarten through grade 12. The program will utilize curriculum guides developed by the State Board of Education in consultation with the Connecticut Police Chiefs Association. A written notification by the student's parent/guardian shall be sufficient to exempt the student from such program in its entirety or from any portion thereof so specified by the parent/guardian.~~

(cf. [0100](#) - Mission Statement)

(cf. [5131](#)/5144/[5114](#) - Conduct/Discipline/Suspension/Expulsion)

(cf. [5131.21](#) - Terroristic Threats/Acts of Violent Behavior)

(cf. [5131.6](#) - Drugs/Alcohol and Tobacco)

(cf. [5131.7](#) - Weapons and Dangerous Instruments)

(cf. [5131.911](#) - Bullying/Safe School Climate Plan)

(cf. [5141.21](#) - Administering Medications)

(cf. [5141.22](#) - Communicable and Infectious Diseases)

(cf. [5141.3](#) - Student Health Assessments and Immunizations)

(cf. [5141.4](#) - Child Abuse and Neglect)

(cf. [5141.5](#) - Suicide Prevention)

(cf. [5141.6](#) - Crisis Management Plan)

(cf. [6142.1](#) - Family Life and Sex Education)

(cf. [6114](#) - Emergencies and Disaster Preparedness)

(cf. [6114.7](#) - Safe Schools)

(cf. [6114.8](#) - Pandemic/Epidemic Emergencies)

Legal Reference: Connecticut General Statutes

[10-220f](#) Safety committee.

P.A. 13-3 An Act Concerning Gun Violence Prevention and Children's Safety (Sections 86, 87, 88)

P.A. 19-5 An Act Concerning the Safe Storage of Firearms in the Home and Firearm Safety Programs in Public Schools

**~~Policy adopted:~~**

**Instruction****Extra-Class Activities: Limited Open Forum (Version I)**

The Equal Access Act requires that public secondary schools grant access to student groups who wish to meet for religious, political, or philosophical purposes, if the school allows other types of non-curriculum related student groups to meet. The law establishes the open forum be held during the lunch hour or as determined by the school Principal to ensure equal access to student groups wishing to meet.

The Principal may approve student groups use of facilities to conduct a meeting during the open forum provided that:

1. The meeting will take place during the open forum. The open forum is defined as the lunch hour or non-instructional time as determined by the Principal.

**-OR-**

The meeting is held during those non-instructional times identified by the Superintendent or his/her designee for non-curricular students' groups, clubs or organizations to meet. "Non-instructional time" means time set aside by the school before actual classroom instruction begins or after actual classroom instruction ends. "Non-curricular student groups" are those student groups, clubs or organizations that do not directly relate to the curriculum.

2. The meeting is voluntary and student initiated. The Principal must be assured that students are the ones promoting such activities and they are participating of their own volition. Only students enrolled in the school may request the meetings.
3. School does not sponsor the meetings (i.e. authorities or district employees do not promote, lead or participate in such meetings). Principals may assign personnel to supervise these meetings. This action does not constitute sponsorship by the district of such meetings.
4. The presence of school authorities or district employees or district personnel at any student religious meeting is non-participatory in nature. The presence of school authorities is for the purpose of observation only.
5. The meeting does not in any way interfere with the conduct of regular instructional activities of the schools. Since the education of the student is the prime responsibility of the school, any other activities are secondary. The school may deny facilities to students on the basis that such activities or meetings interfere with the instructional program.
6. Student meetings are not controlled, conducted or directed by person or groups not affiliated with the schools. Such persons may attend student meetings but not on a regular basis. Visitors to the school must be approved by the Principal and clearance obtained prior to the meeting.
7. The meeting is open to all students without regard to race, gender, religion or national origin.
8. The school retains its authority to maintain order and discipline.
9. All non-curriculum related student groups that are not District sponsored receive substantially the same treatment.
10. The Superintendent or his/her designee approves the meeting or series of meetings.

~~Legal Reference: Westside Community Board of Education v. Mergens~~

~~Equal Access Act 20 U.S.C. §4071 et. seq.~~

~~Policy adopted:~~

6145

## Instruction

### Extra-Class Activities

#### Student Organizations and Equal Access ~~(Version II)~~

The Amity Regional School District No. 5 (ARSD) Board of Education believes that student organizations reinforce the instructional program, give students practice in democratic self-government, and provide social and recreational activities. The activity, club, and athletic programs of the ARSD shall be an outgrowth of class activities and/or student interest. Student organizations also serve to honor outstanding student achievement and enhance school spirit and students' sense of belonging. All activities shall have a faculty advisor and shall be subject to school supervision.

~~**Note:** Schools may or may not sponsor student groups or clubs. The district may wish to sponsor clubs that are linked directly to the curriculum or may want to sponsor non-curriculum related clubs such as a ski or hiking club. The following is an optional sentence for use by districts that allow school sponsorship of student clubs.~~

All students shall be encouraged to participate in one or more activities. ~~H;~~ however, fulfilling academic responsibilities shall take precedence on the part of students engaging in activity and athletic programs. No student who has an unexcused absence from school on the day of a club meeting, activity program, ~~or~~ athletic practice or competition shall be permitted to take part in such activity.

The Superintendent or his/her designee shall establish criteria and a process for school sponsorship of student clubs.

#### **Option 1: (Closed Forum)**

~~In order to maintain a closed forum on school campuses, only student-initiated groups that relate directly to the curriculum shall be allowed to meet on school premises.~~

~~All such clubs or groups shall have equal access to the school media, including the public address system, the school newspaper, the school bulletin board and school website to announce meetings.~~

#### **Option 2: (Limited Open Forum)**

All student-initiated groups shall be given equal access to meet on school premises during non-instructional times without regard to their religious, political, philosophical or other speech content.

~~**Note:** Based on the Equal Access Act, if a district with a limited open forum allows student groups to use school media to publicize meetings, it must provide equal access to all student groups. The U.S. Department of Education has clarified that student religious groups must be allowed to use school media to announce religious activities and meetings on the same terms as other non-curriculum related groups. The following paragraph is optional in that districts do not need to provide access to school media. However, districts choosing to provide such access should do so in accordance with the following paragraph.~~

All student groups shall have equal access to the school media, including the public address system, the school newspaper, the school bulletin board, and school website to announce meetings.



The Superintendent or his/her designee may inform students that certain groups are not ~~school~~ school-sponsored.

~~No school shall deny equal access or a fair opportunity to meet to, or discriminate against, any group officially affiliated with the Boy Scouts of America, or with any other youth group listed as a patriotic society in Title 36 of the United States Code, for reasons based on the membership criteria or oath of allegiance to God and country.~~

Legal Reference: Equal Access Act, 20 U.S.C. § 4071 et. seq.

The No Child Left Behind Act, 20 USC 7905

*Westside Community Board of Education v. Mergens*

~~Policy adopted:~~

## Instruction

### Interscholastic/Intramural Athletics

The Amity Regional School District No. 5 (ARSD) Board of Education believes individual students will benefit from opportunities to grow physically and intellectually through experiences that provide the opportunity for self-discipline and team efforts made possible through competitive ~~interschool~~ interscholastic and intramural ~~team and individual~~ sports activities.

District participation in interscholastic athletics and esports will be subject to approval by the Board. This shall include approval of membership in any leagues, associations, or conferences, ~~of rules for student participation, and of annual sports schedules.~~

It is the Board's policy to provide students interscholastic athletic competition in a variety of sports. Students will be allowed to participate in individual sports on the basis of their physical condition and desire. Qualified personnel shall be provided for coaching and supervising individual sports. ~~In addition, it is the policy of the Board to may provide intramural athletic activities as an outgrowth of class instruction in physical education commensurate with the grade level of the students involved.~~

Students with disabilities, possessing the required level of skill or ability to participate in a competitive program or activity, shall be afforded an equal opportunity to participate in extracurricular activities, which include club, intramural, or interscholastic athletics. The District shall make reasonable modifications and provide those aids and services that are necessary to afford a “qualified” disabled student the opportunity to participate in extracurricular athletics, unless it results in a fundamental alteration to the District's program. The District will consider whether safe participation by a disabled student can be assured through reasonable modifications or the provision of aids and services.

The District ~~shall~~/may ~~(TBD)~~ create additional opportunities for students with disabilities who cannot participate in the existing extracurricular athletics program, even with reasonable modifications or aids and services, in order to afford such students an equal opportunity to receive the benefits of extracurricular athletics.

Each student who chooses to participate in an interscholastic athletic program is required to have on file, in the offices of the ~~building administrator and the~~ Athletic Director, a ~~certificate of consent~~ Permission to Participate form which is signed by the parent or legal guardian. ~~No student may start practice for any athletic team until he or she has been examined and approved by a medical doctor.~~ This ~~certificate of consent~~ Permission to Participate will be in effect for each student for each sports season.

No student may start practice for any athletic team until he or she has been examined and approved by a medical doctor. Completed physical examination forms, or copies of, must be on file in the Health Office of the high school or middle school prior to the first tryout/practice session. Physicals cannot expire during the season. The ARSD will annually post the dates for eligible physicals. Physical examinations performed by a parent who is a medical professional will not be accepted. Add wording from 5141

The purpose of school athletics is both educational and recreational. ~~The athletic program should encourage participation by as many students as possible and should be carried on with the best interests of the participants as the primary consideration.~~ Participation should be without unreasonable interference with other obligations in the school, community and home.

It is recognized that a well-organized and well conducted athletic program is a potent factor in the morale of a student body and an important phase of good community-school relations.

Every possible effort ~~shall~~ will be made to offer equal opportunities for both sexes in sports and activities ~~which shall include life sports that a student can carry through adulthood.~~

## Sunday Play of Postponed Games

The Amity Board of Education endorses the concept of allowing Sunday play of interscholastic games under any of the following conditions:

1. The postponement of Saturday interscholastic games due to severely adverse weather conditions;
2. The postponement of previously scheduled Saturday interscholastic games which fall on religious holy days; and
3. The scheduling of interscholastic games to avoid playing on religious holy days.

No Sunday game will start before 1:30 p.m. The scheduling of Sunday games will confirm to the CIAC rules.

**Esports** ~~(optional language to add to policy if esports is approved by Board as an activity.)~~

In an effort to appeal to students who may not be captivated by the District's existing athletic extracurricular activities, the Board approves the establishment of teams to be involved in esports competition at the high school level. Such involvement shall be ~~based on NFHS sanctioned esports, in partnership with PlayVS~~ sanctioned by

the Connecticut Interscholastic Athletic Association (CIAC). ~~(PlayVS provides an all-in-one online platform for district schools to build teams, manage league schedules, compete and track season statistics.)~~

Students involved in an esports activity shall meet the requirements of academic eligibility established in Board policy and the CIAC.

The Board requires each esports team to have a coach to be onsite during all matches.

~~The participation of each student is \$64 which shall be paid by the school, parent/guardian/sponsor. (*choose*)~~

(cf. [5141](#) – Student Health Services)

(cf. [5145](#) – Section 504: Civil and Legal Rights and Responsibilities)

(cf. 6141.1 – Co-Curricular Eligibility)

(cf. [6145](#) – Extra Class Activities)

Legal Reference: Connecticut General Statutes

[10-149](#) Qualifications for coaches of intramural and interscholastic athletics.

*Stratton, PPA v. St. Joseph's High School*, Bridgeport Superior Court, June 4, 1986 (12 CT 26)9/87.

U.S. Department of Education, Office for Civil Rights, “Dear Colleague Letter,” 113 LRP 3326 (OCR 1/25/13)

**Policy adopted:**