

**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, September 14, 2020, 6:30 pm*

*100 Ohman Avenue*

*Orange, CT*

**[CLICK HERE TO VIEW THIS MEETING](#)**

*Attendance in-person at this meeting is closed to the public; however, public comment can be emailed to [pamela.pero@amityregion5.org](mailto:pamela.pero@amityregion5.org) by 2:00 p.m. on September 14, 2020. Emails received after 2:00 p.m. on September 14, 2020 will be forwarded to the Amity Regional School District No. 5 Board of Education as Correspondence but will not be admitted as part of this meeting. Anonymous items will be forwarded to the Amity Regional School District No. 5 Board of Education as Correspondence but will not be admitted as Public Comment for this meeting.*

- 1. CALL TO ORDER**
- 2. APPROVAL OF MINUTES**
  - a. Regular Board of Education Meeting – August 17, 2020 – Page 3
- 3. STUDENT REPORT**
  - a. Monthly Report
- 4. PUBLIC COMMENT**
- 5. SUPERINTENDENT’S REPORT**
  - a. Personnel Report – Page 8
  - b. Superintendent Report – Page 9
- 6. CORRESPONDENCE**
- 7. 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 12
    7. Facilities
      - a. Monthly Report – Page 13
    8. Finance
      - a. Discussion and Possible Action on Capital Reserve 1% appropriation – Page 14
      - b. Discussion of Monthly Financial Statements – Page 17

- c. Director of Finance and Administration Approved Transfers Under \$3,000 – *Page 45*
- d. Other
- 9. Policy
  - a. Second Read
    - 1. P5145.5 Prohibition Against Sexual Harassment – *Page 46*
    - 2. P5145.511 Exploitation: Sexual Harassment – *Page 53*
    - 3. P5145.4 Nondiscrimination - Transgender and Non-Conforming Students – *Page 58*
    - 4. P5145.42 Section 504 and Title II – *Page 60*
    - 5. P5145.45 Non-Discrimination – *Page 62*
    - 6. P6173 Homebound/Hospital Instruction – *Page 64*
- 10. Discussion of Possible Litigation (Executive Session)
- 11. Personnel
  - a. Discussion of Custodian Contract (Executive Session)
  - b. Discussion of Superintendent Evaluation (Executive Session)
  - c. Discussion of Superintendent Contract (Executive Session)
  - d. Discussion and Possible Action on Board Approval of CSDE Flexibilities for Implementing the CT Guidelines for Educator Evaluation 2017 for the 2020-2021 School Year
  - e. Action on Custodian Contract
  - f. Action on Superintendent Evaluation
  - g. Action on Superintendent Contract

**8. NEW BUSINESS**

**9. ITEMS FOR THE NEXT AGENDA** – Due to Chairperson by September 30, 2020

**10. 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  
AUGUST 17, 2020 REGULAR MEETING MINUTES  
6:30 P.M.  
25 Newton Road, Woodbridge, CT

**BOARD MEMBERS PRESENT**

John Belfonti, Robyn Berke (virtual), Christopher Browe, Patricia Cardozo, Shannan Carlson, Paul Davis, Steven DeMaio, Carla Eichler, George Howard (virtual), Sheila McCreven (virtual), Patrick Reed, Dr. Jennifer Turner (virtual)

**BOARD MEMBERS ABSENT**

Andrea Hubbard

**STUDENT REPRESENTATIVES PRESENT**

Alison Bowler, Caroline Chen

**STAFF MEMBERS PRESENT**

Dr. Jennifer Byars, Theresa Lumas, Thomas Brant, Kathy Burke, Stephan Ciceron, Shaun DeRosa, Ernest Goodwin, Kathy Kovalik, Jill LaPlante, Anna Mahon, Dr. Marie McPadden, James Saisa, Dr. Jason Tracy

**1. CALL TO ORDER**

Chairperson Belfonti called the meeting to order at 6:35 p.m.

**2. PLEDGE OF ALLEGIANCE**

Recited by those present

**3. APPROVAL OF MINUTES**

- a. Regular Board of Education Meeting -- June 8, 2020

*MOTION by Patrick Reed, SECOND by Robyn Berke, to approve as submitted  
VOTES IN FAVOR, 12 (unanimous)  
MOTION CARRIED*

- b. Special Board of Education Meeting -- July 23, 2020

*MOTION by Paul Davis, SECOND by Shannan Carlson, to approve as submitted  
VOTES IN FAVOR, 12 (unanimous)  
MOTION CARRIED*

AMITY REGIONAL SCHOOL DISTRICT NO. 5 BOARD OF EDUCATION  
AUGUST 17, 2020 REGULAR MEETING MINUTES  
6:30 P.M.  
25 Newton Road, Woodbridge, CT

- c. Special Board of Education Meeting -- August 3, 2020

*MOTION by Patricia Cardozo, SECOND by George Howard, to approve as submitted  
VOTES IN FAVOR, 10 (Belfonti, Browe, Cardozo, Davis, DeMaio, Eichler, Howard, McCreven, Reed, Turner)  
ABSTAINED, 2 (Berke, Carlson)  
MOTION CARRIED*

**4. STUDENT REPORT**

- a. Monthly Report

**5. PUBLIC COMMENT**

Received from president of Amity Educators' Association, teachers, and citizen

**6. SUPERINTENDENT'S REPORT**

- a. Personnel Report  
b. Superintendent Report

**7. CORRESPONDENCE**

**8. CHAIRMAN'S REPORT**

Chairperson Belfonti publicly thanked Dr. Byars and the administrators for all their hard work, including putting aside several items like Dr. Byars' review and the Board of Education Retreat to get "all hands on deck" to open the schools. He thanked everybody for their patience.

- a. Committee Reports
1. ACES
  2. Ad Hoc School Safety
  3. CABB
  4. Curriculum

AMITY REGIONAL SCHOOL DISTRICT NO. 5 BOARD OF EDUCATION  
AUGUST 17, 2020 REGULAR MEETING MINUTES  
6:30 P.M.  
25 Newton Road, Woodbridge, CT

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

Chairperson Belfonti publicly thanked Shaun DeRosa and the Technology Department for all their hard work.

7. Facilities
  - a. Monthly Report
8. Finance
  - a. Presentation and Discussion of Second Quarter 2020 Executive Summary Review of Amity Pension Fund, Sick and Severance Account, and OPEB Trust
  - b. Discussion and Possible Action on Contracts over \$35,000
    1. Electrical Contract

*MOTION by George Howard, SECOND by Patrick Reed, to authorize the Superintendent to sign a contract for electricity supply that extends the current contract with Engine Resources, LLC or a provider offering better rates for up to 48 months, on behalf of the District, provided the rates are in the best interest of Amity.*

*VOTES IN FAVOR, 12 (unanimous)*

*MOTION CARRIED*

- c. Presentation and Discussion of 2021-2022 Budget Calendar
- d. Presentation of Annual Report on Reserve Fund for Capital and Nonrecurring Expenditures
- e. Discussion and Possible Action on to initiate process to appropriate funds to Capital and Nonrecurring

*MOTION by Patricia Cardozo, SECOND by Shannan Carlson, to direct the Administration to start the planning process to appropriate 1% (\$495,482) of the 2019-2020 operating funds to the Capital and Nonrecurring Account and bring the resolution and dates to the September Board Meeting for approval.*

*VOTES IN FAVOR, 11 (Belfonti, Berke, Browe, Cardozo, Carlson, Davis, DeMaio, Eichler, Howard, Reed, Turner)*

*VOTES OPPOSED, 1 (McCreven)*

*MOTION CARRIED*

AMITY REGIONAL SCHOOL DISTRICT NO. 5 BOARD OF EDUCATION  
AUGUST 17, 2020 REGULAR MEETING MINUTES  
6:30 P.M.  
25 Newton Road, Woodbridge, CT

- a. Discussion of Monthly Financial Statements
    - 1. Fiscal Year 2019-2020
    - 2. Fiscal Year 2020-2021
  - b. Director of Finance and Administration Approved Transfers Under \$3,000
    - 1. Fiscal Year 2020-2021
  - c. Discussion and Possible Action on Budget Transfers of \$3,000 or More
    - 1. Fiscal Year 2019-2020 (information only –approved in June)
  - d. Other
    - 1. Update on Bond Issue
9. Policy
- e. First Read
    - 1. Roles and Responsibilities of School Security Officers

*MOTION by Sheila McCreven, SECOND by Robyn Berke, to postpone this item until the next Board of Education Regular Meeting*

*VOTES IN FAVOR, 3 (Berke, McCreven, Turner)*

*VOTES OPPOSED, 9 (Belfonti, Browe, Cardozo, Carlson, Davis, DeMaio, Eichler, Howard, Reed)*

*MOTION FAILED*

*MOTION by Sheila McCreven, SECOND by Robyn Berke, to get legal advice on this policy before proceeding*

*VOTES IN FAVOR, 12 (unanimous)*

*MOTION PASSED*

- 2. P5145.5 Prohibition Against Sexual Harassment
- 3. P5145.511 Exploitation: Sexual Harassment
- 4. P5145.4 Nondiscrimination - Transgender and Non-Conforming Students
- 5. P5145.42 Section 504 and Title II
- 6. P5145.45 Non-Discrimination

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AUGUST 17, 2020 REGULAR MEETING MINUTES  
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7. P6114.81 Emergencies and Disaster Preparedness

8. P6173 Homebound/Hospital Instruction

f. Second Read

1. P4112.6 Personnel Records

2. P5132 Dress and Grooming

*MOTION by Sheila McCreven, SECOND by Shannan Carlson, to approve Policy 4112.6 Personnel Records and Policy 5132 Dress and Grooming as submitted*  
*VOTES IN FAVOR, 12 (unanimous)*  
*MOTION CARRIED*

10. Personnel

**9. NEW BUSINESS**

**10. ITEMS FOR THE NEXT AGENDA – Due to Chairperson by August 31, 2020**

Sheila McCreven requested the next meeting be hybrid and that she would offer her time to test the technology preparation prior to that meeting.

**11. ADJOURNMENT**

*MOTION by Steven DeMaio, SECOND by Christopher Browe, to adjourn the meeting*  
*VOTES IN FAVOR, 12 (unanimous)*  
*MOTION CARRIED*

Meeting adjourned at 8:28 p.m.

Respectfully submitted,  
*Pamela Pero*  
Pamela Pero  
Recording Secretary

**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*

**September 14, 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:** NONE
- **Amity Regional Middle School – Bethany:** NONE
- **Amity Regional Middle School – Orange:** NONE

**NEW HIRES-SUBSTITUTES:**

*John Garrity* – 5 Day Bench Substitute – Amity Middle School-Bethany  
*Makayla Welton* – 5 Day Bench Substitute – Amity Middle School-Bethany  
*Lisa Woosley* – 5 Day Bench Substitute – Amity Middle School-Bethany  
*Hannah Roessler* – 5 Day Bench Substitute – Amity Regional High School  
*Faten Wassef* – 5 Day Bench Substitute – Amity Regional High School

**NEW HIRES-NON-CERTIFIED:**

*Michael Stoehrer* - .8 Security Guard – Amity Regional High School  
*Michael Baraquin* – FT Evening Custodian – Amity Regional High School  
*Jeffrey Moffat* – Math Paraprofessional – Amity Middle School-Bethany  
*Shelby Drake* – PT Vocational Paraprofessional – Amity Transition Academy

**NEW HIRES-COACHES:**

*Cassidy Kirby* – Asst. Volleyball Coach - 2020 Fall Season – Amity Regional High School

**TRANSFERS:**

*Jack Giannotti* – Full Time Security Guard at Amity Regional High School to 5 Day Bench Substitute at Amity Middle School-Orange, eff. 2020-2021 school year

**RESIGNATIONS:**

*Samantha Metty* – Paraprofessional – ARHS, eff. 08/19/2020  
*Holly Scheck* – 5 Day Bench Sub – AMSB, eff. 09/03/2020

**RETIREMENTS:** NONE



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

*jennifer.byars@amityregion5.org*  
*203.392.2106*

Superintendent's Report – September 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.

**Instruction**

**Welcome Back:** On August 31, 2020 the district welcomed back students A-L and on September 1<sup>st</sup>, we welcomed back students K-Z. Teachers spent the first week getting to know students and orienting the students to the learning platforms, building safety measures, and all other changes that have been implemented. We saw many “smiling eyes” behind masks, as students and teachers reconnected with each other and it was wonderful to see our buildings and school community come back together.

**Taking Risks, Trying New Things and Collaborating:** As teachers worked to prepare for the new landscape of hybrid, synchronous instruction, teachers at ARHS have worked diligently to introduce new technology (hardware and software) to their teaching practice, as well as support each other through collaboration and sharing of instructional practices. This work will continue throughout the year during Inter-Disciplinary PLC time.

**2019-2020 Underclass Awards Night:** In order to recognize the accomplishments, both academically and community-based, of our current 10<sup>th</sup>-12<sup>th</sup> grade students, the high school building leadership team will host an Underclass Awards Night ceremony via a virtual presentation on Wednesday, September 30, 2020. The program will highlight departmental awards as well as book awards presented by the counseling department. Parents and students will be invited in advance to watch the pre-recorded presentation and certificates and books will be available for pick-up in the counseling department after the ceremony.

**AMSB Holds Team Meetings:** The administration at AMSB met with each team of students over the first week of school. We spent time together in the side field, courtyard, and orchard as we discussed the expectations for the year, including treating each other with kindness, staying positive, and being respectful and responsible. It was nice to take a quick mask break together and spend some time seeing each other's faces!

**AMSO Welcome:** AMSO welcomed 351 students to the Amity school community. In-person students participated in small welcome assemblies hosted by administration over the first 2 days of school. Remote learners participated in a Zoom welcome meeting that included an opportunity for students to ask questions and become familiar with the expectations of being a remote learner at AMSO.

**AMSO Tech Bootcamp:** 7<sup>th</sup> grade students spent the day on Thursday, September 3 and Friday, September 4, 2020 working with academic and Life Arts teachers with a focus introducing students to all the various technological devices and platforms they will use as an AMSO student. Students participated

in a variety of learning activities that introduced them to Aristotle, Google Classroom, G-mail, the school schedule, and other software programs.

**Pupil Services Update:** Pupil Services welcomed Ms. Jaime Guthrie (Dawson) as our new Pupil Services Coordinator. Ms. Guthrie will be supporting ARHS while further developing our transition and social emotional supports for students. During the first two weeks of August, we welcomed back students in our Transition Academy and SAILS programs to an in-person summer session to build school readiness skills. Amity Transition Academy has settled into their temporary location at Amity Middle School Orange. ATA students have begun to access the Albertus Magnus Campus and select work environments as health and safety protocols have permitted. Students in Ms. Galiani's class at AMSO have begun participation in adaptive Music and Physical Education classes. Work has started on completing The Learning Model IEP Implementation Plan for all students receiving special education services across our district.

**Amity Welcomes New Teachers:** An abbreviated and socially distanced New Teacher Orientation was held in August and included a description of the Teacher Education and Mentoring Program (TEAM) for teachers working under an Initial Certification. The TEAM Program provides for mentor teachers to support the new teachers. The mentors have an important role in working with the new teachers to guide and support them through specific learning modules focused on instruction, planning, classroom environment, and assessment.

**Increased Professional Learning to Start 2020-2021:** Professional Learning sessions were held during the week of August 24-28 for teachers and paraeducators. Sessions included a keynote by Allison Zmuda, a nationally known curriculum consultant in the Understanding by Design (UbD) and the importance of creating a *Week at a Glance* to support students and families during Hybrid or Full Distance Learning. Ms. Zmuda met with each content department 7-12 to answer specific curriculum design questions. Other sessions included training on Aristotle, a new classroom management system, Google Classroom, and the Hybrid Teaching Model/Blended Learning. Content/PLC time was given daily for teacher planning time to practice new learning. Professional Learning has continued for all staff on Thursday afternoons during our hybrid instructional model.

## Resources

**Virtual Back-To-School Night:** To maintain a continuum of programming while using resources efficiently, the high school will be hosting one "Open House" night this year, which will take place in a virtual format. All teachers will create a presentation for their classrooms and students will be asked to "walk" their parents through each class period on September 16, 2020. Open Houses for the middle schools will be held in the same format on September 17, 2020.

**AMSB Holds Device Exchange Days:** During the last few weeks of summer, the Amity Technology Department held a series of device exchange days for students and families at AMSB. Paraeducators and the school security team assisted to make the days run smoothly and ensure that our first in-school experience for 7<sup>th</sup> grade students was positive and productive.

**AMSO Device Rollout:** The AMSO 1:1 device rollout on August 18, 2020 was very successful. Over 125 devices were distributed to 7<sup>th</sup> grade students. In addition to getting their devices, 7<sup>th</sup> grade students were able to become familiar with the building prior to opening day.

## Climate

**Administrator Google Classrooms:** In an effort to keep the student body up to date regarding school information, including schedules, announcements, letter days, etc., the high school administrators have created Google Classrooms for each grade. Pertinent information is posted through the Classrooms and students can find links to the letter day calendar, hybrid bell schedule, and offsite class schedule. Grade-specific announcements will be posted through this platform as well. The classrooms will complement the

Student Happenings Newsletter, which continues to be published weekly and in an accessible manner for students.

**Spartan Seminar during Hybrid:** The ARHS Advisory Program, Spartan Seminar, will begin on Wednesday, September 23, 2020 during the virtual Wednesday and will meet roughly every 2 weeks for the remainder of the year (regardless of the instructional model the District is following). The vision of Spartan Seminar is to be “a program designed to engage Amity students, faculty and staff in an exploration of various civic, social, and emotional topics in an effort to build a strong, inclusive community and empower individuals to be the best version of themselves.”

**Virtual Club Meetings:** As part of the District Reopening Plan, high school clubs are encouraged to organize and begin meeting in a virtual format (provided the advisor is able to attend meetings). So far, Junior State of America, Student Government, Debate Club and others have begun to meet virtually.

**Awareness/Activist Opportunities for Staff and Students:** Over the past month, there have been opportunities presented to students and staff to engage with online webinars and join committees to help address issues of systemic racism, bias, and exclusivity in our school, local, and larger communities. In August, Mrs. Mahon disseminated information on an ADL webinar about talking to children about bias, in which many Amity High School teachers and administrators participated. CAS-CIAC has invited students from around the state to apply to the newly-formed Student Equity Advisory Board, about which multiple Amity students have expressed interest, and Amity Regional High School Social Studies teacher Jim Clifford shared information about a Zoom discussion called “Revolution on Trial” that took place on the afternoon of Wednesday, September 9, 2020 which many Amity HS educators also planned on attending.

**AMSB Picture Days:** September 8, 2020 (L-Z) and September 10, 2020 (A-K) were picture days for all AMSB. Extended hours starting after school were held for any fully remote students to have the opportunity to have their picture taken.

**New Staff at AMSB:** We have had a couple retirements this past year and would like to welcome the new teachers and staff taking their place. Over the course of the summer several AMSB teachers and administration worked to find the best candidates for each position, and are proud of the new staff members we have found. We would like to welcome Teresa Garrity (7<sup>th</sup> grade Spanish), Caitlin Magnan (7<sup>th</sup> grade Science), and Gary Roberts (SSO).

**Thank You AMSB PTSO:** Over the summer, the PTSO, along with several AMSB teachers, planned for a wonderful welcome for students and staff. The PTSO provided our teachers with snacks during our summer professional development. In addition, they created wonderful posters, reminding our students about healthy BE AMITY habits. The PTSO made the welcome banner for our front entrance and prepared welcome bags for our students, filled with items to promote mental and physical health.

**PTSO Welcome Back Gifts:** Thanks is given to the AMSO PTSO for the wonderful goody bags presented to teachers at the start of the school year. The mobile organizers are a great addition to the teachers traveling carts.

September, 2020

## August Ticket Summary

Tickets addressed and closed: 131

Tickets open: 14

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

## Technology Department Monthly Report

### Completed Projects:

- Device distribution to approx. 2000 students, including seniors who requested
- Device distribution to approx. 300 teachers and staff
- Installed and configured 5 thermal scanning cameras at entrances of all three schools

### Projects in process:

- Infrastructure update project
  - Fiber optic runs are complete
  - Copper Cat 6a runs are 100% complete in the high school and AMSO, work in Bethany has already begun
  - New wifi access points are being hung in every classroom as the copper runs are being completed, AHS and AMSO are already complete
  - All four core switches have arrived and are installed and operational, supply chain issues have slowed the arrival of the edge switches; they have been shipped (Sept. 9) and are expected to arrive by the end of the week (Sept. 18)
  - All servers have arrived
  - CEN will be installing additional hardware in the next two weeks, at which point our final 10GB bandwidth handoff will be completed
  - Current estimated completion date due to supply chain delays is first week in October; this is a moving target, there is some hope it moves into Sept... and some fear it could move deeper into Oct.
- Aristotle deployment is complete, all features are working, we are troubleshooting some issues with the Live Lecture feature with the vendor. Updates are expected to address these issues within the week.
- Scanners for every classroom to handle student attendance have arrived, installation at all three locations is in progress.
  - ID cards for each student have arrived and are being printed
  - Distribution should begin this week (Sept. 14-18)
- Technicians have been addressing support tickets for both students and staff to support the transition to the current hybrid model.

# Amity Regional School District No. 5

CLEAN

SAFE

HEALTHY

SCHOOLS

## Facilities Department Monthly Report

### Completed Projects:

- The chiller refurbishment project being completed by Trane at Amity Regional High School was successfully completed.
- Preventive Maintenance was completed on all HVAC units by in-house personnel. All units were cleaned, filters changed, motors serviced, and dampers were examined for proper operation.
- Many plexiglass dividers were designed, built, and installed by our in-house building mechanic district wide.
- Three new drinking fountains with bottle filling stations were installed at Amity Regional High School by in-house personnel.
- The computer lab near the library at Amity Middle School, Orange Campus, was prepared for a dividing wall to create two classrooms out of one by in-house personnel. The wall was then installed by our vendor.
- All sewage ejector pumps were serviced by our contractor at all three buildings.
- The asphalt replacement project at Amity Regional High School was completed.
- Summer maintenance was performed on all kitchen equipment by our contractor.
- Two more new cabinet heaters were installed to replace old ones at Amity High School by in-house personnel
- Summer cleaning was completed in all three schools.
- Social distancing signage and directional stickers were installed at all three schools.

### 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 is completed. Construction of sections of the second shed has begun.
- Engineering and design has commenced for the Athletic Fields projects at Amity Regional High School. We are waiting for the resolution from the appeal to commence construction. The piers for the bleachers on field 3 are complete.
- The HVAC replacement project at Amity Regional High School is currently on-going. The only item remaining is the punch list inspection by vanZelm Engineers. All units are currently operating as designed.

### Outstanding issues to be addressed:

- None at this time.

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**

**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: Jennifer Byars, Ed. D., Superintendent of Schools

From: Theresa Lumas, Director of Finance and Administration

Re: Appropriation to Capital Reserve from **2019-2020** Surplus

Date: September 9, 2020

The District has operated under legal advisement that transferring 1% of the prior year budget to a CNR required either a district town meeting in which voters would cast paper ballots or a referendum. Your research with multiple legal counsels, which includes one of our own attorneys, CABA Deputy Director and General Counsel, and the Connecticut State Department of Education all, provided an opinion that a majority vote of the Regional Board of Education is sufficient. I posed the question to my colleagues in CASBO. I received five responses to date, four regional school district transfer into the Capital and Nonrecurring Account by Board vote and one regional district is reviewing changing from district meeting to board vote based on new legal advice. You have confirmed with two other regional school districts that transfer is accomplished by board vote. Lastly, I heard from the Director of Government Affairs at CASBO who indicated that a majority vote of the Board is required, no district meeting or referendum.

Therefore, I am recommending the Amity Finance Committee and Board of Education approve the following appropriation and budget transfer of **\$495,482** into Reserve Fund for Capital and Nonrecurring Expenses from the fiscal year 2019-2020 surplus for the purpose of a roof replacement/restoration at Amity Regional High School. The roof replacement/restoration is anticipated in fiscal year 2022 when the 10-year warranty expires.

It may be helpful to know the difference in the return to member towns with and without the requested appropriation to capital and nonrecurring. The two options are shown below:

**Amounts Returned to Towns with 1% Appropriation**

<b>Bethany</b>	<b>Orange</b>	<b>Woodbridge</b>
18.356%	50.868%	30.776%
<b>2019-2020</b>		
<b>MEMBER TOWNS</b>	<b>UNUSED FUNDS*</b>	<b>#1</b>
BETHANY	\$ 358,085	<i>Unspent funds less 1% of \$495,482, returned at FY20 allocation rates</i>
ORANGE	\$ 992,321	
WOODBIDGE	\$ 600,371	
<b>TOTALS</b>	<b>\$ 1,950,777</b>	
<b>2018-2019</b>		
<b>MEMBER TOWNS</b>	<b>UNUSED FUNDS*</b>	
BETHANY	\$ 6,840	<i>Unspent encumbrances returned at FY19 allocation rates</i>
ORANGE	\$ 17,792	
WOODBIDGE	\$ 10,825	
<b>TOTALS</b>	<b>\$ 35,457</b>	
<b>TOTAL RETURN</b>		
<b>MEMBER TOWNS</b>	<b>UNUSED FUNDS*</b>	
BETHANY	\$ 364,925	<i>Combined FY19 and FY20 returns</i>
ORANGE	\$ 1,010,113	
WOODBIDGE	\$ 611,196	
<b>TOTALS</b>	<b>\$ 1,986,234</b>	

**Amounts Returned to Towns *without* 1% Appropriation**

Bethany	Orange	Woodbridge
18.356%	50.868%	30.776%
<b>2019-2020</b>		
<b>MEMBER TOWNS</b>	<b>UNUSED FUNDS*</b>	<b>#2</b>
BETHANY	\$ 449,035	<i>All unspent funds returned, zero appropriation to Capital Nonrecurring Account, at FY20 allocation rates</i>
ORANGE	\$ 1,244,363	
WOODBRIIDGE	\$ 752,861	
<b>TOTALS</b>	<b>\$ 2,446,259</b>	
<b>2018-2019</b>		
<b>MEMBER TOWNS</b>	<b>UNUSED FUNDS*</b>	
BETHANY	\$ 6,840	<i>Unspent encumbrances returned at FY19 allocation rates</i>
ORANGE	\$ 17,792	
WOODBRIIDGE	\$ 10,825	
<b>TOTALS</b>	<b>\$ 35,457</b>	
<b>TOTAL RETURN</b>		
<b>MEMBER TOWNS</b>	<b>UNUSED FUNDS*</b>	
BETHANY	\$ 455,875	<i>Combined FY19 and FY20 returns</i>
ORANGE	\$ 1,262,155	
WOODBRIIDGE	\$ 763,686	
<b>TOTALS</b>	<b>\$ 2,481,716</b>	

**Amity Finance Committee:**

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

**Amity Board of Education:**

*Move to approve –*

*... an appropriation and budget transfer of \$495,482 into Reserve Fund for Capital and Nonrecurring Expenses from the fiscal year 2019-2020 surplus and designate these funds for a roof replacement at Amity Regional High School. The roof replacement/restoration is anticipated in fiscal year 2022 when the 10-year warranty expires.*

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
05-15-2512-5255	Medical & Dental Account	\$495,482	
05-15-0000-5856	Transfer Account		\$495,482



**AMITY REGIONAL SCHOOL DISTRICT NO. 5  
REVENUES AND EXPENDITURES  
FOR FY 2020-2021**

		<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>2019-2020</b>	<b>2020-2021</b>	<b>JULY 2020</b>	<b>CHANGE</b>	<b>AUG 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	48,627,967	49,760,789	49,760,789	0	49,760,789	0	FAV
2	OTHER REVENUE	262,141	248,317	232,209	(18,596)	213,613	(34,704)	UNF
3	OTHER STATE GRANTS	758,946	731,653	731,653	0	731,653	0	FAV
4	MISCELLANEOUS INCOME	70,134	43,750	36,750	0	36,750	(7,000)	UNF
5	BUILDING RENOVATION GRANTS	0	0	0	0	0	0	FAV
6	<b>TOTAL REVENUES</b>	<b>49,719,188</b>	<b>50,784,509</b>	<b>50,761,401</b>	<b>(18,596)</b>	<b>50,742,805</b>	<b>(41,704)</b>	<b>UNF</b>
7	SALARIES	25,967,645	27,168,752	27,307,052	65,760	27,372,812	204,060	UNF
8	BENEFITS	5,141,056	6,186,149	6,181,836	1,957	6,183,793	(2,356)	FAV
9	PURCHASED SERVICES	7,565,040	9,450,642	9,066,433	151,697	9,218,130	(232,512)	FAV
10	DEBT SERVICE	4,559,210	4,453,835	4,453,835	0	4,453,835	0	FAV
11	SUPPLIES (INCLUDING UTILITIES)	2,935,589	2,907,974	2,907,974	(6,647)	2,901,327	(6,647)	FAV
12	EQUIPMENT	771,215	134,053	134,053	0	134,053	0	FAV
13	IMPROVEMENTS / CONTINGENCY	222,666	305,940	305,940	0	305,940	0	FAV
14	DUES AND FEES	110,508	177,164	170,013	0	170,013	(7,151)	FAV
15	TRANSFER ACCOUNT	495,482	0	0	0	0	0	FAV
16	<b>TOTAL EXPENDITURES</b>	<b>47,768,411</b>	<b>50,784,509</b>	<b>50,527,136</b>	<b>212,767</b>	<b>50,739,903</b>	<b>(44,606)</b>	<b>FAV</b>
17	<b>SUBTOTAL</b>	<b>1,950,777</b>	<b>0</b>	<b>234,265</b>	<b>(231,363)</b>	<b>2,902</b>	<b>2,902</b>	<b>FAV</b>
18	PLUS: CANCELLATION OF PRIOR YEAR'S ENCUMBRANCES	<b>35,457</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>1,986,234</b>	<b>0</b>	<b>234,265</b>	<b>(231,363)</b>	<b>2,902</b>	<b>2,902</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 2020-2021**

		<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>2019-2020</b>	<b>2020-2021</b>	<b>JULY 2020</b>	<b>CHANGE</b>	<b>AUG 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	8,926,150	9,000,731	9,000,731	0	9,000,731	0	FAV
2	ORANGE ALLOCATION	24,736,074	25,003,802	25,003,802	0	25,003,802	0	FAV
3	WOODBRIAGE ALLOCATION	14,965,743	15,756,256	15,756,256	0	15,756,256	0	FAV
4	<b>MEMBER TOWN ALLOCATIONS</b>	<b>48,627,967</b>	<b>49,760,789</b>	<b>49,760,789</b>	<b>0</b>	<b>49,760,789</b>	<b>0</b>	<b>FAV</b>
5	ADULT EDUCATION	3,748	3,042	3,042	0	3,042	0	FAV
6	PARKING INCOME	20,865	32,000	16,000	0	16,000	(16,000)	UNF
7	INVESTMENT INCOME	52,292	35,000	20,000	0	20,000	(15,000)	UNF
8	ATHLETICS	25,300	22,000	11,000	0	11,000	(11,000)	UNF
9	TUITION REVENUE	133,936	129,675	155,567	(18,596)	136,971	7,296	FAV
10	TRANSPORTATION INCOME	26,000	26,600	26,600	0	26,600	0	FAV
11	TRANSPORTATION BOWA AGREEMENT	0	0	0	0	0	0	FAV
12	<b>OTHER REVENUE</b>	<b>262,141</b>	<b>248,317</b>	<b>232,209</b>	<b>(18,596)</b>	<b>213,613</b>	<b>(34,704)</b>	<b>UNF</b>
13	OTHER STATE GRANT	0	0	0	0	0	0	FAV
14	SPECIAL EDUCATION GRANTS	758,946	731,653	731,653	0	731,653	0	FAV
15	<b>OTHER STATE GRANTS</b>	<b>758,946</b>	<b>731,653</b>	<b>731,653</b>	<b>0</b>	<b>731,653</b>	<b>0</b>	<b>FAV</b>
16	RENTAL INCOME	18,177	14,000	7,000	0	7,000	(7,000)	UNF
17	INTERGOVERNMENTAL REVENUE	32,884	4,750	4,750	0	4,750	0	FAV
18	OTHER REVENUE	19,073	25,000	25,000	0	25,000	0	FAV
19	TRANSFER IN	0	0	0	0	0	0	FAV
20	<b>MISCELLANEOUS INCOME</b>	<b>70,134</b>	<b>43,750</b>	<b>36,750</b>	<b>0</b>	<b>36,750</b>	<b>(7,000)</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>49,719,188</b>	<b>50,784,509</b>	<b>50,761,401</b>	<b>(18,596)</b>	<b>50,742,805</b>	<b>(41,704)</b>	<b>UNF</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 2020-2021**

		<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>LINE</b>	<b>CATEGORY</b>	<b>2019-2020</b>	<b>2020-2021</b>	<b>JULY 2020</b>	<b>CHANGE</b>	<b>AUG 2020</b>	<b>VARIANCE</b>	<b>FAV</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	21,243,071	22,123,005	22,261,305	65,760	22,327,065	204,060	UNF
2	5112-CLASSIFIED SALARIES	4,724,574	5,045,747	5,045,747	0	5,045,747	0	FAV
3	<b>SALARIES</b>	<b>25,967,645</b>	<b>27,168,752</b>	<b>27,307,052</b>	<b>65,760</b>	<b>27,372,812</b>	<b>204,060</b>	<b>UNF</b>
4	5200-MEDICARE - ER	354,550	393,384	393,384	0	393,384	0	FAV
5	5210-FICA - ER	293,447	315,690	315,690	0	315,690	0	FAV
6	5220-WORKERS' COMPENSATION	203,071	237,774	213,271	1,957	215,228	(22,546)	FAV
7	5255-MEDICAL & DENTAL INSURANCE	3,134,277	4,229,925	4,229,925	0	4,229,925	0	FAV
8	5860-OPEB TRUST	40,950	31,678	31,678	0	31,678	0	FAV
9	5260-LIFE INSURANCE	42,820	47,280	47,280	0	47,280	0	FAV
10	5275-DISABILITY INSURANCE	10,277	10,529	10,719	0	10,719	190	UNF
11	5280-PENSION PLAN - CLASSIFIED	851,987	790,234	790,234	0	790,234	0	FAV
12	5281-DEFINED CONTRIBUTION RETIREMENT PLAN	99,079	120,224	120,224	0	120,224	0	FAV
12	5282-RETIREMENT SICK LEAVE - CERT	0	0	0	0	0	0	FAV
13	5283-RETIREMENT SICK LEAVE - CLASS	0	0	0	0	0	0	FAV
14	5284-SEVERANCE PAY - CERTIFIED	0	0	0	0	0	0	FAV
15	5290-UNEMPLOYMENT COMPENSATION	109,160	7,431	27,431	0	27,431	20,000	UNF
16	5291-CLOTHING ALLOWANCE	1,438	2,000	2,000	0	2,000	0	FAV
17	<b>BENEFITS</b>	<b>5,141,056</b>	<b>6,186,149</b>	<b>6,181,836</b>	<b>1,957</b>	<b>6,183,793</b>	<b>(2,356)</b>	<b>FAV</b>
18	5322-INSTRUCTIONAL PROG IMPROVEMENT	21,594	22,200	22,200	0	22,200	0	FAV
19	5327-DATA PROCESSING	110,412	102,829	102,829	0	102,829	0	FAV
20	5330-OTHER PROFESSIONAL & TECHNICAL SRVC	1,385,205	1,759,359	1,759,359	0	1,759,359	0	FAV
21	5440-RENTALS - LAND, BLDG, EQUIPMENT	48,229	113,634	113,634	0	113,634	0	FAV
22	5510-PUPIL TRANSPORTATION	2,861,329	3,544,897	3,409,089	0	3,409,089	(135,808)	FAV
23	5521-GENERAL LIABILITY INSURANCE	238,281	247,562	249,804	0	249,804	2,242	UNF
24	5550-COMMUNICATIONS: TEL, POST, ETC.	77,186	114,356	114,356	0	114,356	0	FAV
25	5560-TUITION EXPENSE	2,640,986	3,446,498	3,195,855	151,697	3,347,552	(98,946)	FAV
26	5590-OTHER PURCHASED SERVICES	181,818	99,307	99,307	0	99,307	0	FAV
27	<b>PURCHASED SERVICES</b>	<b>7,565,040</b>	<b>9,450,642</b>	<b>9,066,433</b>	<b>151,697</b>	<b>9,218,130</b>	<b>(232,512)</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 2020-2021**

		<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>LINE</b>	<b>CATEGORY</b>	<b>2019-2020 ACTUAL</b>	<b>2020-2021 BUDGET</b>	<b>JULY 2020 FORECAST</b>	<b>CHANGE INCR./(DECR.)</b>	<b>AUG 2020 FORECAST</b>	<b>VARIANCE OVER/(UNDER)</b>	<b>FAV UNF</b>
28	5830-INTEREST	809,210	788,835	788,835	0	788,835	0	FAV
29	5910-REDEMPTION OF PRINCIPAL	3,750,000	3,665,000	3,665,000	0	3,665,000	0	FAV
30	<b>DEBT SERVICE</b>	<b>4,559,210</b>	<b>4,453,835</b>	<b>4,453,835</b>	<b>0</b>	<b>4,453,835</b>	<b>0</b>	<b>FAV</b>
31	5410-UTILITIES, EXCLUDING HEAT	620,438	709,866	709,866	(6,647)	703,219	(6,647)	FAV
32	5420-REPAIRS, MAINTENANCE & CLEANING	774,787	761,354	761,354	0	761,354	0	FAV
33	5611-INSTRUCTIONAL SUPPLIES	311,910	366,196	366,196	0	366,196	0	FAV
34	5613-MAINTENANCE/CUSTODIAL SUPPLIES	228,327	229,557	229,557	0	229,557	0	FAV
35	5620-OIL USED FOR HEATING	42,700	42,700	42,700	0	42,700	0	FAV
36	5621-NATURAL GAS	47,475	67,173	67,173	0	67,173	0	FAV
37	5627-TRANSPORTATION SUPPLIES	96,789	124,202	124,202	0	124,202	0	FAV
38	5641-TEXTS & DIGITAL RESOURCES	291,630	63,778	63,778	0	63,778	0	FAV
39	5642-LIBRARY BOOKS & PERIODICALS	18,584	20,215	20,215	0	20,215	0	FAV
40	5690-OTHER SUPPLIES	502,949	522,933	522,933	0	522,933	0	FAV
41	<b>SUPPLIES (INCLUDING UTILITIES)</b>	<b>2,935,589</b>	<b>2,907,974</b>	<b>2,907,974</b>	<b>(6,647)</b>	<b>2,901,327</b>	<b>(6,647)</b>	<b>FAV</b>
42	5730-EQUIPMENT - NEW	332,148	70,947	70,947	0	70,947	0	FAV
43	5731-EQUIPMENT - REPLACEMENT	439,067	63,106	63,106	0	63,106	0	FAV
44	<b>EQUIPMENT</b>	<b>771,215</b>	<b>134,053</b>	<b>134,053</b>	<b>0</b>	<b>134,053</b>	<b>0</b>	<b>FAV</b>
45	5715-IMPROVEMENTS TO BUILDING	160,841	55,940	55,940	0	55,940	0	FAV
45a	5715-FACILITIES CONTINGENCY	100,000	100,000	100,000	0	100,000	0	FAV
45b	TRSF. FROM FACILITIES CONTINGENCY	(100,000)	0	0	0	0	0	FAV
46	5720-IMPROVEMENTS TO SITES	61,825	0	0	0	0	0	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	0	0	0	0	FAV
48	<b>IMPROVEMENTS / CONTINGENCY</b>	<b>222,666</b>	<b>305,940</b>	<b>305,940</b>	<b>0</b>	<b>305,940</b>	<b>0</b>	<b>FAV</b>
49	5580-STAFF TRAVEL	10,723	24,850	22,365	0	22,365	(2,485)	FAV
50	5581-TRAVEL - CONFERENCES	22,406	46,660	41,994	0	41,994	(4,666)	FAV
51	5810-DUES & FEES	77,379	105,654	105,654	0	105,654	0	FAV
52	<b>DUES AND FEES</b>	<b>110,508</b>	<b>177,164</b>	<b>170,013</b>	<b>0</b>	<b>170,013</b>	<b>(7,151)</b>	<b>FAV</b>
53	<b>5856-TRANSFER ACCOUNT</b>	495,482	0	0	0	0	0	FAV
54	<b>ESTIMATED UNSPENT BUDGETS</b>		0	0	0	0	0	FAV
55	<b>TOTAL EXPENDITURES</b>	<b>47,768,411</b>	<b>50,784,509</b>	<b>50,527,136</b>	<b>212,767</b>	<b>50,739,903</b>	<b>(44,606)</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**



AUGUST 2020

**2020-2021 FORECAST**

**OVERVIEW**

*The projected unspent fund balance for this fiscal year is \$2,902.*

**REVENUES BY CATEGORY**

The projected yearend balance of revenues is **\$41,704 UNF**, which appears on page 2, column 6, line 22.

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

The forecast is based on actual State payments.

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

*The forecast estimates 50% of parking revenue will be collected, \$16,000 UNF. Difficult to determine the demand and opportunity yet.*

**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.*

<u>Month</u>	<u>Peoples United</u>	<u>State Treasurer's Investment Fund</u>
July 2020	0.392%	.352%
August	0.392%	.221%

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

*The forecast estimates a 50% reduction due to limited fan participation for at least one season, \$11,000 UNF.*

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

The budget is based on seven tuition students. The actual tuition charged is higher (\$71 per year) than budgeted since the rate is set after the budget referendum is past. Two new tuition students enrolled in the District. *One student disenrolled. The projected variance is \$7,296 FAV previously \$25,892 FAV.*

**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.

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

The forecast estimates a 50% reduction based on limiting the use of the building for at least a portion of the year due to COVID19, **\$7,000 UNF**.

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

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

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

The forecast is based on budget currently, *no change anticipated at this time, \$0 FAV*.

**EXPENDITURES BY CATEGORY**

The projected yearend balance of expenditures is **\$ 44,606 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 need for additional coverage is anticipated. We intend to expand our use of bench subs to better ensure adequate class coverage and supervision in the buildings, current projection is \$204,060 UNF previously \$138,300 UNF.*

**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 need for additional support staff is anticipated.

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

The forecast is based on the budget for current staff.

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

The workers' compensation premium is less than budgeted and the forecast assumes the payroll audit will be as budgeted. Member equity distribution was received for \$9,190 FAV and a contract stabilization rate approved by the Board in May saving \$15,313 FAV. **Total savings YTD \$22,546 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. *Medical claims are lower, presumably due to routine office visits and medical tests being postponed. We expect claims will rise later in the year as employees and families return to routine care visits or possibly an increase in COVID treatments. The forecast projects the account will be neutral at this time.*

**CLAIMS OF CURRENT EMPLOYEES AND RETIREES**

<b>MONTH</b>	<b>2020-2021 ACTUAL</b>	<b>2020-2021 BUDGET</b>	<b>VARIANCE</b>	<b>2019-2020 ACTUAL</b>	<b>2018-2019 ACTUAL</b>
<i>JUL</i>	\$ <b>256,509</b>	\$ 408,015	\$ (151,506)	\$ 366,182	\$ 292,718
<i>AUG</i>	\$ <b>200,490</b>	\$ 446,937	\$ (246,447)	\$ 383,765	\$ 282,192
<i>SEP</i>	\$ 365,001	\$ 365,001	\$ -	\$ 317,685	\$ 376,576
<i>OCT</i>	\$ 363,318	\$ 363,318	\$ -	\$ 383,369	\$ 245,938
<i>NOV</i>	\$ 453,630	\$ 453,630	\$ -	\$ 370,672	\$ 418,110
<i>DEC</i>	\$ 484,052	\$ 484,052	\$ -	\$ 403,126	\$ 334,678
<i>JAN</i>	\$ 354,535	\$ 354,535	\$ -	\$ 348,820	\$ 331,129
<i>FEB</i>	\$ 307,567	\$ 307,567	\$ -	\$ 124,317	\$ 384,149
<i>MAR</i>	\$ 389,184	\$ 389,184	\$ -	\$ 276,832	\$ 363,660
<i>APR</i>	\$ 343,398	\$ 343,398	\$ -	\$ 196,735	\$ 278,082
<i>MAY</i>	\$ 409,054	\$ 409,054	\$ -	\$ 124,900	\$ 363,382
<i>JUN</i>	\$ 326,536	\$ 326,536	\$ -	\$ 194,428	\$ 224,419
<b>TOTALS</b>	\$ <b>4,253,272</b>	\$ <b>4,651,225</b>	\$ <b>(397,953)</b>	\$ <b>3,490,831</b>	\$ <b>3,895,033</b>

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

<b>2016-2017 ACTUAL</b>	<b>2017-2018 ACTUAL</b>	<b>2018-2019 ACTUAL</b>	<b>2019-2020 FORECAST</b>	<b>2020-2021 FORECAST</b>
85.2%	72.1%	92.2%	84.1%	<b>91.4%</b>

**Note: 2020-2021 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>2020-2021 ACTUAL</b>	<b>2020-2021 BUDGET</b>	<b>VARIANCE</b>	<b>2019-2020 ACTUAL</b>	<b>2018-2019 ACTUAL</b>
<i>JUL</i>	\$ 53,562	\$ 61,957	\$ (8,395)	\$ 65,692	\$ 63,793
<i>AUG</i>	\$ 50,187	\$ 65,755	\$ (15,568)	\$ 62,661	\$ 60,070
<i>SEP</i>	\$ 58,089	\$ 58,089	\$ -	\$ 46,306	\$ 63,599
<i>OCT</i>	\$ 61,041	\$ 61,041	\$ -	\$ 70,245	\$ 63,213
<i>NOV</i>	\$ 41,539	\$ 41,539	\$ -	\$ 59,406	\$ 71,815
<i>DEC</i>	\$ 37,299	\$ 37,299	\$ -	\$ 62,365	\$ 70,016
<i>JAN</i>	\$ 36,807	\$ 36,807	\$ -	\$ 73,157	\$ 78,786
<i>FEB</i>	\$ 36,239	\$ 36,239	\$ -	\$ 57,592	\$ 66,033
<i>MAR</i>	\$ 32,198	\$ 32,198	\$ -	\$ 58,624	\$ 38,918
<i>APR</i>	\$ 36,879	\$ 36,879	\$ -	\$ 57,573	\$ 69,321
<i>MAY</i>	\$ 36,343	\$ 36,343	\$ -	\$ 56,459	\$ 76,505
<i>JUN</i>	\$ 35,743	\$ 35,743	\$ -	\$ 56,502	\$ 72,044
<b>TOTALS</b>	<b>\$ 515,925</b>	<b>\$ 539,887</b>	<b>\$ (23,962)</b>	<b>\$ 726,582</b>	<b>\$ 794,113</b>

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

The forecast is based on the budget, \$0 FAV.

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

*The forecast is based on the current staff, \$190 UNF.*

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

The current forecast projects this account will be **neutral**.

**LINE 15 on Page 3: 5290-UNEMPLOYMENT:**

The forecast estimates the account may run \$20,000 UNF. The budget was reduced prior to the pandemic based on a low utilization for several years. Many of the current claimants will come off unemployment when we reopen. However, there are a number of claimants that are receiving benefits based on their past 24 months of work history with Amity and are not current employees. It is difficult to measure how many will remain on benefits. **\$20,000 UNF.**

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

Special Education Transportation is projecting a **\$110,075 FAV** balance partly due to the first summer session was held virtually. Late busses and field trips will be reduced due to COVID-19, currently assuming a 10% or **\$25,733 FAV** projection.

**LINE 23 on Page 3: 5521-GENERAL LIABILITY INSURANCE:** Student Accident insurance renewed slightly higher-\$922 UNF, LAP and several other policies came in lower-\$8,588 FAV and cyberinsurance is now a separate policy and not covered under general liability increases \$9,907 UNF for a total account increase of **\$2,242 UNF**

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



E-Rate funding is pending for the current fiscal year. The District may receive discounted invoices for the CEN service provided by the State of Connecticut. The funding decision is expected soon.

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

*Tuition is currently forecasted to have a \$98,946 FAV previously \$250,643 FAV variance.* The forecast is based on current students and their placements.

Tuition for the vo-ag schools has a projected variance of *\$68,318 previously \$83,118 FAV.*

	<b>FY16-17 ACTUAL</b>	<b>FY17-18 ACTUAL</b>	<b>FY18-19 ACTUAL</b>	<b>FY19-20 ACTUAL</b>	<b>FY20-21 BUDGET</b>	<b>FY20-21 FORECAST</b>
Sound	3	4	6	6	8	7(6)
Trumbull	3	6	4	4	5	4
Nonnewaug	3	4	6	5	7	4
Common Ground Charter HS	1	0	0	0	1	0
ACES Wintergreen Magnet	0	0	0	0	0	0
King Robinson Magnet	1	0	0	0	0	0
Engineering Science Magnet	0	1	0	0	0	0
Highville Charter School	0	1	0	0	0	0
<b>Totals</b>	<b>11</b>	<b>16</b>	<b>16</b>	<b>15</b>	<b>21</b>	<b>15</b>

ECA is projected variance *to be \$16,200 FAV previously \$6,235 FAV, below budget, with three less students enrolled than budgeted.*

	<b>FY16-17 ACTUAL</b>	<b>FY17-18 ACTUAL</b>	<b>FY18-19 ACTUAL</b>	<b>FY19-20 ACTUAL</b>	<b>FY20-21 BUDGET</b>	<b>FY20-21 FORECAST</b>
<b>ECA</b>	<b>15</b>	<b>19</b>	<b>24</b>	<b>21</b>	<b>21</b>	<b>18</b>

*Public (ACES) and private out-of-district placements are currently less than anticipated, \$14,428 FAV previously \$162,125 FAV but typically there are many changes during the year.*

	<b>FY16-17 ACTUAL</b>	<b>FY17-18 ACTUAL</b>	<b>FY18-19 ACTUAL</b>	<b>FY19-20 ACTUAL</b>	<b>FY20-21 BUDGET</b>	<b>FY20-21 FORECAST</b>
Public SPED	8	8	11	8	9	7
Private SPED	27	20	22	18	29	30(29)
<b>Totals</b>	<b>35</b>	<b>28</b>	<b>33</b>	<b>26</b>	<b>38</b>	<b>37(36)</b>

**LINE 30 on Page 4: 5830 & 5910-DEBT SERVICE :**

Debt service is \$54,962 overbudget of the estimate for the new bond. There was premium paid by purchaser to offset this increase so the budget will remain neutral and this variance is paid from bond proceeds.

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

The 2020-2021 budget for electricity assumes the use of 3,189,868 kilowatt hours at an average price of \$0.19661 per kilowatt hour, or a cost of \$627,736. *The usage is projected to on budget, neutral.*

**ELECTRICITY (KILOWATT HOURS)**

<b>MONTH</b>	<b>2020-2021 FORECAST</b>	<b>2020-2021 BUDGET</b>	<b>VARIANCE</b>	<b>2019-2020 ACTUAL</b>	<b>2018-2019 ACTUAL</b>
<i><b>JUL</b></i>	<i><b>254,693</b></i>	261,716	<i><b>(7,023)</b></i>	306,744	104,580
AUG	292,794	292,794	-	298,187	152,275
SEP	308,389	308,389	-	255,198	314,178
OCT	282,314	282,314	-	294,827	271,919
NOV	260,774	260,774	-	243,754	249,759
DEC	260,198	260,198	-	250,944	247,237
JAN	268,460	268,460	-	266,227	274,992
FEB	269,090	269,090	-	251,802	263,959
MAR	256,461	256,461	-	217,683	248,762
APR	260,337	260,337	-	232,983	262,037
MAY	246,095	246,095	-	145,568	276,658
JUN	223,240	223,240	-	239,032	91,898
<b>Totals</b>	<b>3,182,845</b>	<b>3,189,868</b>	<b>(7,023)</b>	<b>3,002,949</b>	<b>2,758,254</b>

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

The budget assumes there will not be a Load Shed credit. Building had limited use in FY20 from March 13-June 30. We are pursuing a new contract and may have savings in future months.

The budget for propane is \$3,330. *The forecast is neutral at this time.*

The budget for water is \$47,800. *The forecast is neutral at this time.*

Sewer costs are budgeted at \$31,000, costs are projected to be \$24,353. *The forecast is \$6,647 FAV at this time.*

**DEGREE DAYS**

There are 0 degree days to date compared to 0 last year at this time.

**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.

**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.

**LINES 49 & 50 on page 4: 5580 & 5581 STAFF TRAVEL AND TRAVEL - CONFERENCES :**

A 10% reduction is estimated antipating less travel between schools and to conferences. *The forecast is projected to on \$7,151 FAV.*

***COVID-19 EXPENDITURES:*** *Currently expenditures related to preparing for reopening in the COVID-19 environment are estimated at \$782,561. The two largest purchases are in the area of PPE of approximately \$51,318, \$29,419 on cleaning supplies, \$164,108 for social distancing measures, and \$240,540 for classroom scanners. There is a potential of spending \$278,160 for additional personnel to provide coverage for absences, remote teaching, and additional supervision for appropriate COVID-19 protocols. Expenses are across all object codes and will be funded with the funds held as a 15% encumbrance, in the amount of \$968,619 in regular accounts. A budget transfer will be requested after grant funds are approved and exhausted. Currently the District was approved for \$55,040 in ESSER funds. These grant funds were utilized for summer programs and curriculum writing not included in the COVID-19 estimates. A second grant, Coronavirus Relief Funds (CRF) has a preliminary award to the District for \$234,390. The application will be completed as soon as it is available. There are still more purchases to restock supplies anticipated.*

## APPENDIX A

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

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**TOTAL ANNUAL SAVINGS TO-DATE OF: \$43,497**

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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.

**\$3,500 Re-purposed Materials:** There was a request for adding a second actor preparation area in the green room of the auditorium at Amity Regional High School. In-house personnel re-purposed counters, electrical strips, and brackets from other areas of the District and installed all items. The savings estimated by re-purposing over buying new is \$3,500.

**\$1,400 Trash:** Jim Saisa contacted our trash company and asked to reduce the number of trash pickups per week. We had to increase the number of recycling pickups at Orange due to the amount of lunches being made there. The net savings will be approximately \$1,400 to the District.

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-committe>
- 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).

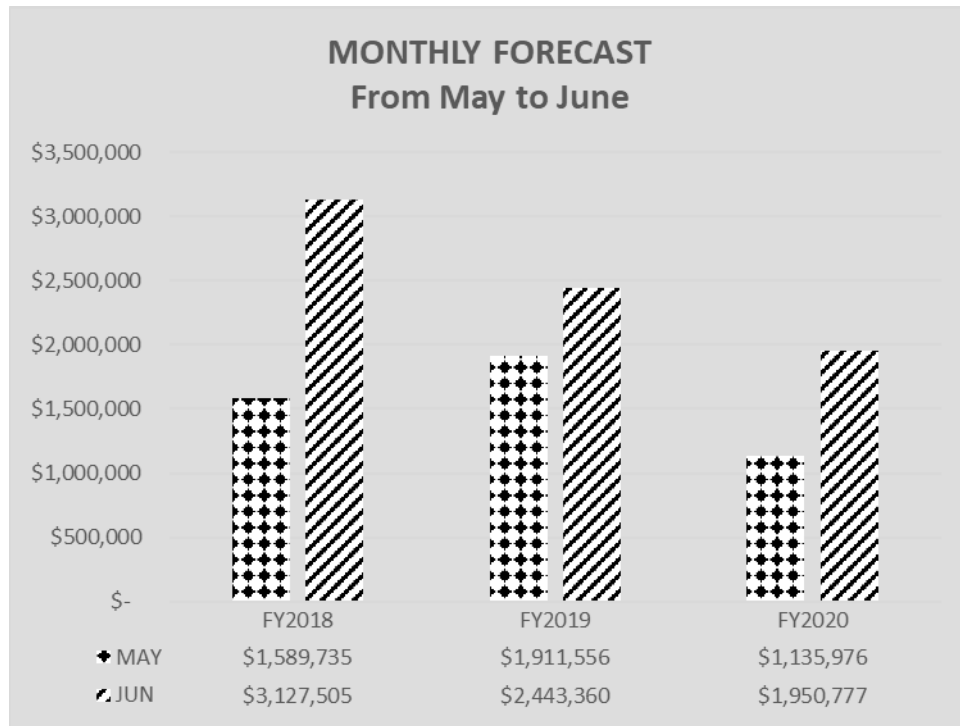
Revenues can be most impacted by decisions made at the State level for Special Education and Transportation grants. We have seen the reimbursement rate change in mid-year.

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.

### 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.

**FY2020:**

The unaudited fund balance is \$1,950,777 after \$515,077 in EOY purchases and assuming 1% or \$492,485 appropriated to Capital and Nonrecurring Account. The monthly forecast for May 2020 projected a fund balance of \$1,135,976. The change is **\$815,982 higher than the prior month's forecast**. The major reasons for the significant increase in the yearend fund balance was the unsettled environment of the COVID-19 global pandemic. As of the May 2020 meeting, the Governor had not announced if schools would reopen prior to the end of the school year. School was eventually cancelled for the remainder of the year and almost all accounts were impacted. The changes from one month to the next month were, as follows:



- **\$121,462:** Certified and classified salaries were lower due to the school closures. Spring coaches salaries were reduced, substitutes and coverages were not needed, staff development hours, homebound instruction, chaperone duties, and overtime were all near zero.
- **\$296,642:** Medical & dental claims were lower due to the COVID-19 global pandemic. Routine office visits and medical tests were postponed all spring across the region. Since we are self-insured, actual claims are not known until the end of the fiscal year. Unemployment claims, though high were lower than May's estimate. The District has not experienced claims of this magnitude and estimating the actual costs were difficult. Many claims were in dispute. The change was \$26,000 FAV.
- **\$155,607** Purchased services were lower due to the COVID-19 global pandemic. There were no athletic contests, which reduced the annual number of game day staff and officials paid. Less need for printed materials, postage, end of year celebrations, graduation and stepping up costs, and athletic rentals were less due to the social distancing requirements.
- **\$76,091:** Transportation and fuel costs for busses were lower due to the COVID-19 global pandemic. Contracts were renegotiated in May but with school cancellation final for the year, additional savings resulted. There were no late runs, athletic trips, or field trips at the end of the year.
- **\$70,483:** Instructional supplies were lower due to the COVID-19 global pandemic. Consumable materials could not be utilized in the remote learning environment so there was a significant decrease in food for culinary, lumber and other raw materials for technology education and science lab materials.
- **\$54,739:** Communication costs were lower due to the COVID-19 global pandemic. Less postage, copy paper, and catering needs due to the remote learning environment.
- **\$35,521:** Rentals for fields, tables, chairs, tents, etc. were lower due to the COVID-19 global pandemic. End of year athletic contests were cancelled and ceremonies were done in a socially distance manner which eliminated the need for many items used for large crowd gatherings.
- **\$14,945:** Electricity usage was lower due to the COVID-19 global pandemic. Buildings had a few occupants during the March through June timeframe.

APPENDIX C

**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. These 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. This 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,

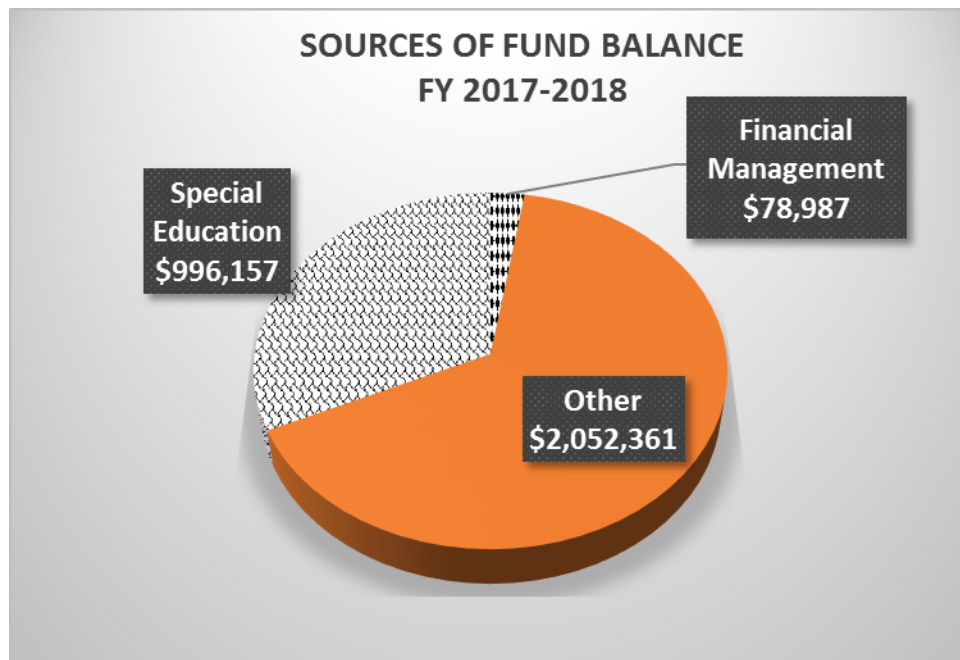
summer work costs, substitute costs, degree changes and homebound services were less than anticipated.

**\$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.

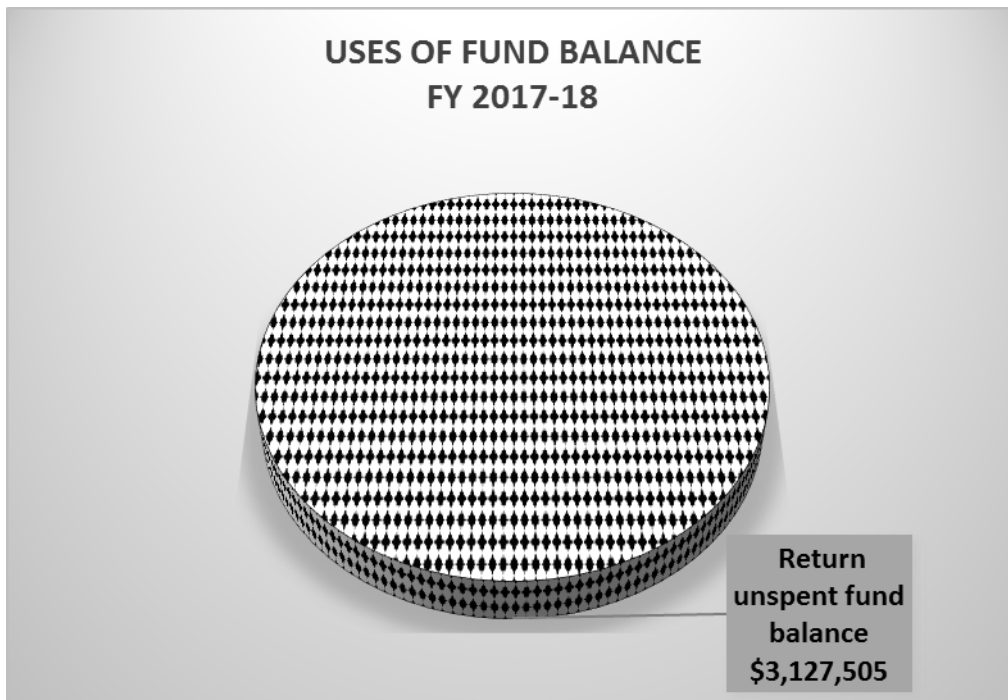
The primary sources of the fund balance are shown graphically below:



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 D**

**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><u>\$166,245</u></i>

The *audited* fund balance for 2018-2019 is \$2,034,101 plus \$409,259 designated at year-end for security projects. These 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 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:**

**\$ 1,289,695**

**\$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.

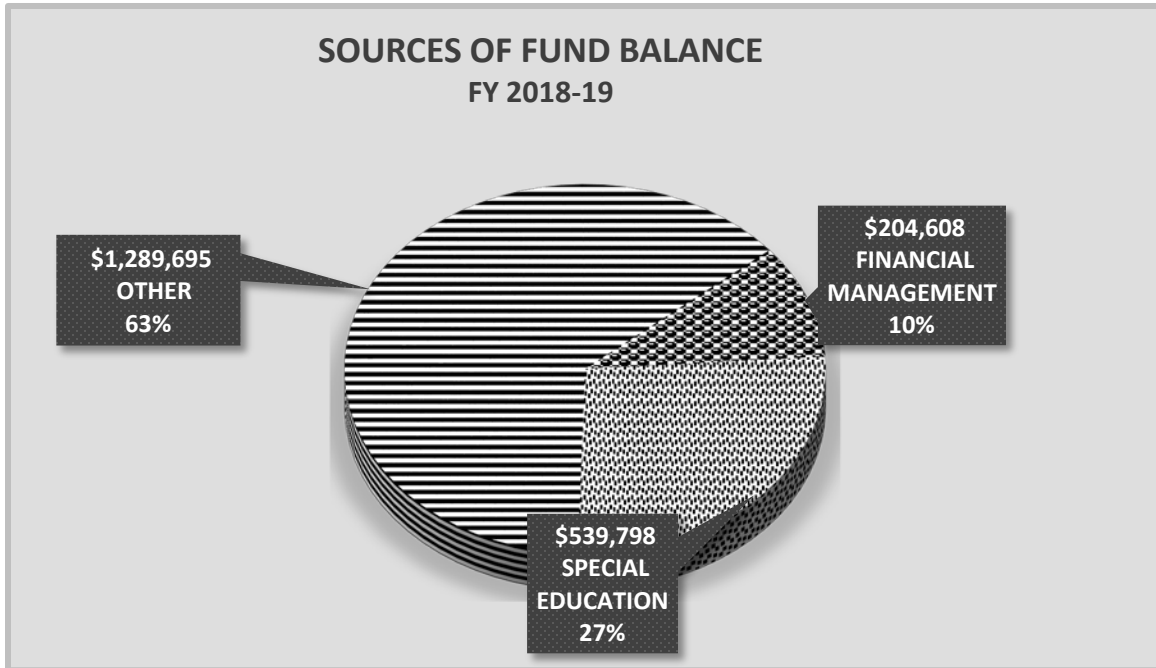
**\$378,012 REVENUE:** The Special Education Grant was higher than budgeted by \$224,297 based on actual special education costs and a higher reimbursement rate. The interest earned on the District's accounts was \$100,966 more than budgeted as interest rates were higher than budgeted. These accounts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

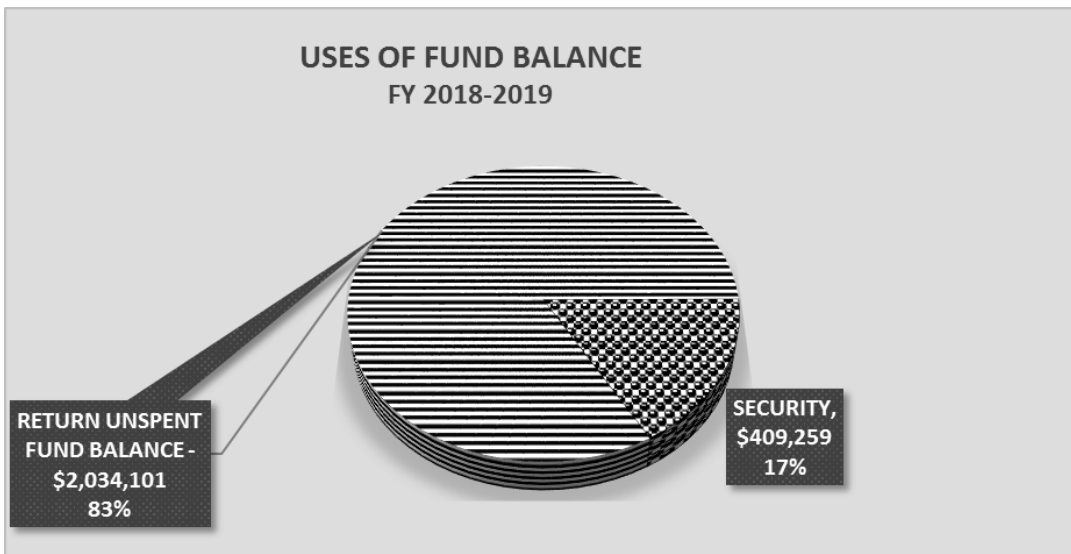
The primary sources of the fund balance are shown graphically below:



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. **\$2,034,101** - Return of unspent fund balance upon audit completion.

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>\$ 392,378</i>
<i>Town of Orange</i>	<i>\$1,020,712</i>
<i>Town of Woodbridge</i>	<i><u>\$ 621,011</u></i>
<i>Total</i>	<i>\$2,034,101</i>



**APPENDIX E**

**RECAP OF 2019-2020**

**Return Unspent Fund Balance:**

*The cancellation of 2018-2019 encumbrances of \$35,457 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 2019-2020, the funds will be returned.*

<i>Bethany</i>	<i>\$ 6,839</i>
<i>Orange</i>	<i>\$ 17,792</i>
<i>Woodbridge</i>	<i><u>\$ 10,825</u></i>
<i>Total</i>	<i>\$ 35,457</i>

The *preliminary unaudited* fund balance for 2019-2020 is \$1,953,498, assuming the 1% or \$495,482 is transferred to the Capital Nonrecurring Account. The fund balance is net of \$515,077 of end-of-year expenditures that are posted in FY20. The source of the available funds are described below.

**SUMMARY:**

*The monthly financial report for February 2020 as reported at the March AFC & BOE meetings forecasted a fund balance of \$799,396. Days later, on March 12, 2020, the District cancelled in-person instruction and learning. Most employees continued to work with the exception of substitute teachers. The hours of operation were still severely impacted as all after-school, weekend and evening activities were cancelled. This came at a time when schools would typically operate on extended schedules to accommodate sporting activities, overnight field trips, school plays, award ceremonies, stepping up and graduation ceremonies. Busses did not operate for 58 days in the District. Buildings remained open but with minimal staff as the majority of staff worked remotely, reducing utilities consumption. Contracts for professional services were re-negotiated or cancelled as were rentals of other fields, tables, and tents. Overtime and staff travel was non-existent and only a few conferences were held (via remote features).*

**FINANCIAL MANAGEMENT:**

**\$ 107,610**

The turnover factor exceeded the budget by \$70,559. Administrators carefully consider salary placement for new hires. Some part-time vacancies were not filled during the shut-down. Liability, workers' compensation, and student accident insurance coverages were negotiated at a lower rate than anticipated, \$37,051.

**SPECIAL EDUCATION:**

**\$ 580,502**

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 \$580,502 prior to the shutdown.

**SALARIES, MEDICAL, PURCHASED SERVICES (OTHER):                    \$2,273,224**

**\$627,603 SALARIES (OTHER):** Teacher coverages, substitute costs, coaching stipends, overtime, homebound services, and chaperone stipends were some of the budgeted items affected by the remote instruction environment. Payroll taxes were down as result of the lower payroll costs. All after-school, evening and weekend activities were cancelled for typically the busiest time of the school year.

**\$926,221 MEDICAL (OTHER):** The net balance of the medical account was under budget. Claims and fees were lower than budgeted as hospitals and doctors suspended routine visits, diagnostic tests, and non-emergency procedures amid the pandemic. The insurance claims were running at 95.7% of budget through February 2020 and fell to 81.3% by the end of the year. Dental claims were near zero during the final quarter of the fiscal year.

**\$228,156 TRANSPORTATION SERVICES: (OTHER):** School busses did not transport students for daily runs, late runs, athletic events or extra-curricular activities from mid-March through the end of the school year. The daily contract was re-negotiated with transportation contractors while other services were cancelled entirely. Fuel cost were reduced as a result of the shutdown.

**\$82,664 PURCHASED SERVICES (OTHER):** Purchased services costs were lower due to several factors. Cancellation of spring sports resulted in fewer athletic contests and fewer officials, monitors, and scorekeepers, \$32,000 FAV; \$26,000 FAV was saved for contracted services changes with a less expensive provider and training of in-house staff, \$14,000 FAV was not spent on end of year programs and events; \$8,955 FAV was left from the NEASC budget.

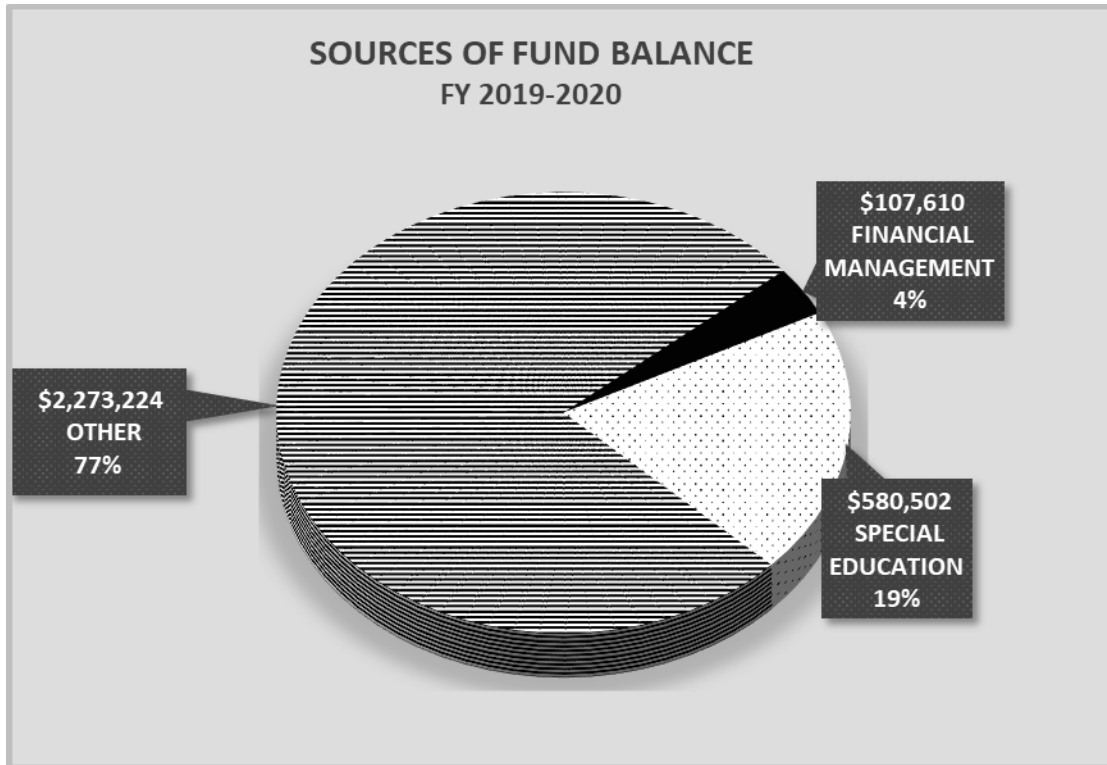
**\$93,339 UTILITIES (OTHER):** A mild winter combined with fuel cell operating properly to supply heat generated savings of \$17,731 FAV. Electricity usage was down due to the reduced occupancy in buildings, \$70,089 FAV.

**\$57,290 STAFF TRAVEL AND CONFERENCES:** Staff travel was halted in mid-March with many in-person conferences cancelled. Mileage payments for staff traveling between buildings and travel and accommodations for out of District travel were not needed during the final quarter of the school year.

**\$70,483 INSTRUCTIONAL SUPPLIES (OTHER):** Purchases and consumption of instructional materials was reduced during the remote instruction period. It was not feasible to use many art supplies, photography film, live specimens, lumber, and culinary supplies in a remote environment.

**\$38,170 COMMUNICATIONS: TEL, POST, ETC. (OTHER):** Less copy paper, postage, toner and other Xerox supplies were needed during the remote instruction period. The District also received a grant for internet 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. **\$1,950,777** - Return of unspent fund balance per audit.
2. **\$ 495,482** – Request for Capital Reserve (\*pending)
3. **\$ 515,077** - End of Year Purchases

**\$1,950,777 RETURN OF UNSPENT FUND BALANCE *pending audit*:** the annual audit is usually presented to the Amity Finance Committee and Board of Education for acceptance in December or January. Funds are returned to member towns after completion and acceptance of the audit.

**\$495,482 (1%) CAPITAL AND NONRECURRING ACCOUNT:** The Amity Finance Committee and Board of Education approved moving forward in the process to transfer 1% of the FY20 budget surplus into the Capital and Nonrecurring account. This process is not finalized yet.

**\$515,077 END OF YEAR PURCHASES (EOY):**

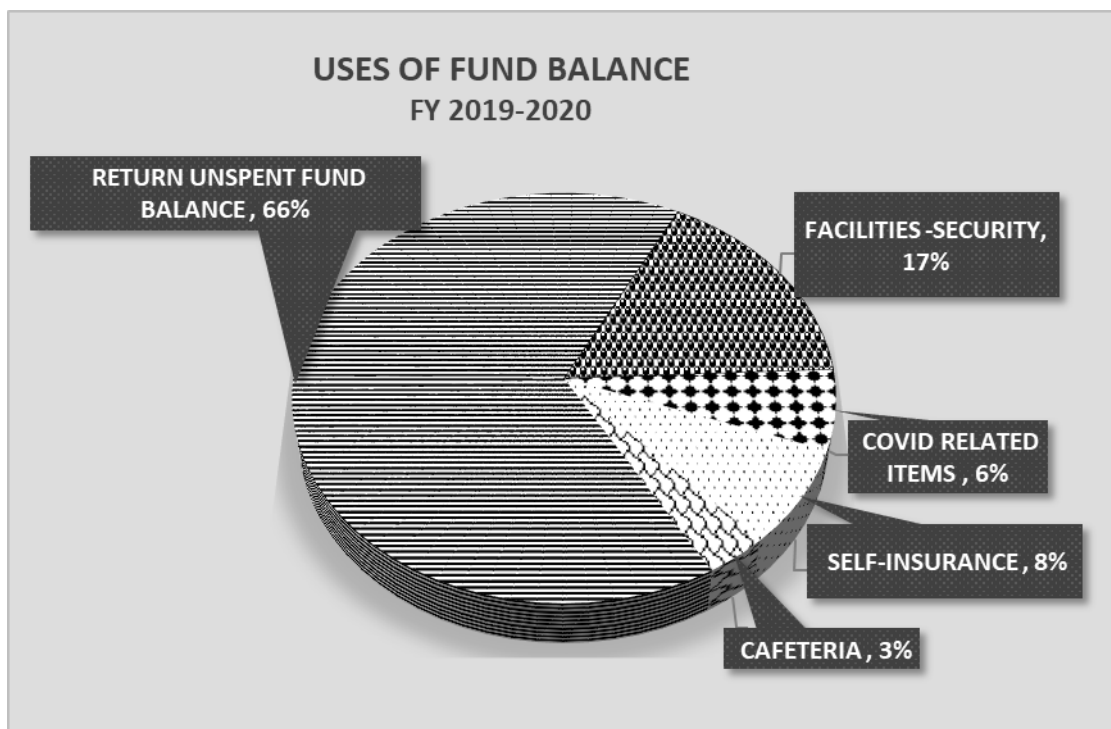
**\$229,311 SELF-INSURANCE FUNDING. (EOY):** The suspension of routine exams, diagnostic tests, dental appointments, and non-emergency surgeries reduced the medical claims for the final quarter of FY20. It is anticipated that once the State reopens the missed procedures will be scheduled, as well as those of age and need for the current year, and in a worse case scenario claims could rise due to COVID-19 treatments as the District reopens. This amount represents raising the self-insurance reserve from a 25% threshold of claims to 30% on a temporary basis of one year. If funds are not needed, the reserve

will be reduced to 25% and the funds will be utilized to offset the budget request for fiscal year 2021-22.

**\$185,766 COVID-19 (EOY):** Purchases of personal protective equipment such as masks, gowns, gloves, and face shields were made to prepare for reopening, recognizing none of these items were anticipated in developing the FY21 budget. Thermal security cameras were purchased to register temperatures and perform a mask check of staff and students arriving at main entrances of all three schools. Laptops for high school teachers were purchased to prepare for remote instruction upon reopening.

**\$100,000 CAFETERIA (EOY):** The District’s fund to support school lunch program has been running a deficit for three straight years. The ongoing repair and maintenance of aging equipment contributed to the deficit and the State’s change in eligibility status determination increased free and reduced lunch status. Next year appears to be even more challenging in the COVID-19 environment as we will have to change how service is provided, food is served, and food packaging. These necessary changes will increase costs with no anticipated increase in revenue.

The uses of the fund balance are shown graphically below:



**Return Unspent Fund Balance:**

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

Bethany	\$ 358,085
Orange	\$ 992,321
Woodbridge	\$ 600,371
<b>Total</b>	<b>\$1,950,777</b>

**Amity Regional School District No. 5 - Budget Transfers 2020-2021**

<u>MONTH/YR</u>	<u>JNL#</u>	<u>ACCOUNT NUMBER &amp; DESCRIPTION</u>	<u>AMOUNT</u>	<u>DESCRIPTION</u>
2021-Jul	56	03-14-2600-5613 MAINTENANCE/CUSTODIAL SUPPLIES	(678.00)	SCHOOLDUDE SRVC CONT (15% HOLD)
2021-Jul	56	05-14-2600-5690 OTHER SUPPLIES	678.00	SCHOOLDUDE SRVC CONT (15% HOLD)
2021-Jul	57	03-14-2600-5613 MAINTENANCE/CUSTODIAL SUPPLIES	(90.00)	EAGLE TRAILERS (15% HOLD)
2021-Jul	57	03-14-2600-5440 RENTALS-LAND,BLDG,EQUIPMENT	90.00	EAGLE TRAILERS (15% HOLD)
2021-Jul	69	03-14-2600-5613 MAINTENANCE/CUSTODIAL SUPPLIES	(446.00)	ADDITIONAL FUNDS EAGLE TRAILERS
2021-Jul	69	03-14-2600-5440 RENTALS-LAND,BLDG,EQUIPMENT	446.00	ADDITIONAL FUNDS EAGLE TRAILERS
2021-Jul	106	03-11-3202-5440 RENTALS-LAND,BLDG,EQUIPMENT	(150.00)	15% HOLD BACK-EAGLE LEASING
2021-Jul	106	02-11-3202-5440 RENTALS-LAND,BLDG,EQUIPMENT	150.00	15% HOLD BACK-EAGLE LEASING

## Students

### Prohibition Against Sexual Harassment

The Amity Regional School District No. 5 (District or ARSD) recognizes that sexual harassment, including sexual assault, is unlawful sex discrimination. The Board of Education (Board) prohibits sex discrimination/sexual harassment in the District’s education program or activities. Education program or activity includes locations, events, or circumstances over which the school exercises substantial control over both the respondent (alleged perpetrator of sexual harassment) and the context in which the sexual harassment occurs. In addition to occurring on school grounds, sexual harassment may potentially occur off campus, in places or situations where athletic and extracurricular activities occur, on field trips, on the school bus, at school-related conferences or through use of school technology.

Schools shall respond to sexual harassment occurring in the District’s education program or activities for which they have “actual knowledge.” “Actual knowledge” means notice of sexual harassment or an allegation of sexual harassment brought to the attention of the Title IX Coordinator, any official of the school who has authority to institute corrective measures on the behalf of the school, as well as to any other employee of an elementary and secondary school.

Sexual harassment may take the form of student-on-student, employee-on- student, employee-on-employee, student-on-employee sexual harassment, or may be perpetrated against students or employees by third parties under the control of the District. Students who engage in proven sexual harassment may be subject to discipline, up to and including expulsion. Employees who engage in proven sexual harassment may be subject to disciplinary action, up to and including termination, as well as other action required under the law.

### Definition of Sexual Harassment for the Purposes of Title IX

Sexual harassment is conduct on the basis of sex that satisfies one or more of the following:

- (i) A school employee conditioning an education benefit or service on participation in unwelcome sexual conduct (i.e. quid pro quo)
- (ii) Unwelcome conduct that a reasonable person would determine as so severe, pervasive, and objectively offensive that it effectively denies a person equal access to the school’s education program or activity;
- (iii) “Sexual assault” as defined in 20 U.S.C. 1092 (f)(6)(A)(v)(the Clery Act), “dating violence” as defined 34 U.S.C. 12291(a)(10), “domestic violence” as defined in 34 U.S.C. 12291(a)(8), or “stalking” as defined in 34 U.S.C. 12291(a)(3) (the Violence Against Women Act (VAMA)).

## Students

Examples of sexual harassment may include, but are not limited to:

- pressure for sexual activity
- repeated remarks with sexual or sexually demeaning implications
- unwelcome or inappropriate touching
- sexual assault
- suggesting or demanding sexual involvement accompanied by implied or explicit threats concerning a student's grades or academic standing or an employee's employment status
- telling lewd jokes or sharing stories about sexual experiences – even if not directed at you but done in your presence to cause you discomfort
- sending unwanted suggestive or lewd emails, letters or other communications or sharing images of a sexual nature around the workplace or displaying posters, items or screensavers of a sexual nature
- repeatedly asking for dates despite being rebuffed
- making sexually offensive gestures or facial expressions
- dating violence or stalking

## Other Definitions

‘Complainant’ is defined as a person who is alleged to be the victim of conduct that could constitute sexual harassment.

“Respondent” is defined as a person who is alleged to be the perpetrator of conduct that could constitute sexual harassment.

“Supportive measures” are defined as non-disciplinary, non-punitive, individualized services, offered as appropriate and without charge to a complainant or respondent before or after the filing of a formal complaint, or where no complaint has been filed.

## Title IX Coordinator

The Superintendent of Schools designates and authorizes the Coordinator of Pupil Services to be the District's Title IX Coordinator. This individual shall be given the title of and be referred to as the Title IX Coordinator and is responsible for ensuring compliance across the school district with Title IX, corresponding state law, and applicable board policy concerning sex discrimination/sexual harassment.

Applicants for admission and employment, students, parents or legal guardians of elementary

## **Students**

and secondary school students, employees, and all unions shall be notified of the name or title, office address, electronic mail address, and telephone number of the Title IX Coordinator.

The Title IX Coordinator's contact information shall be posted on the District's website and included in student and employee handbooks and published in other locations as deemed appropriate.

## **Reporting Sexual Harassment**

Any person, including, but not limited to, students, their parents or guardians, employees, bystanders or third parties (whether or not the person is the alleged victim), may report sex sexual harassment, including sexual assault, occurring in the District's education program or activities. Reporting may occur in person, by mail, by telephone or by electronic mail, using the contact information provided for the Title IX Coordinator, or by any other means that results in the Title IX Coordinator receiving the person's verbal or written report. Reports may be made at any time including during non-business hours.

A formal complaint is defined as a document filed by a complainant or signed by the Title IX Coordinator alleging sexual harassment against an individual and requesting that the school investigate the alleged sexual harassment. In an instance where the Title IX Coordinator signs the complaint, the Title IX Coordinator is not a party to the complaint nor is such action taken on behalf of the complainant.

The Title IX Coordinator will make forms available for both informal reports and formal complaints of sexual harassment. Additionally, such forms will be posted on the District's website. Informal reports are permissible and may be brought by any person. However, only a complainant and the District's Title IX Coordinator may file a formal complaint. All formal complaints will be investigated. Supportive measures shall be offered to a complainant with or without the filing of a formal complaint.

There is no time limit on a complainant's decision to file a formal complaint, but complainants are encouraged to promptly report incidents of sexual harassment, and/or to file a formal complaint.

## **Response including Supportive Measures**

Any school employee with actual knowledge of sex discrimination/sexual harassment shall promptly inform the District's Title IX Coordinator. The failure to do so may be grounds for disciplinary action.



## **Students**

Upon actual knowledge of sexual harassment, the Title IX Coordinator will promptly contact the complainant to advise and discuss with the complainant: 1.) the availability of supportive measures with or without the filing of a formal complaint, 2.) the right to file a formal complaint, and 3.) how to file a formal complaint.

A complainant as well as a respondent shall be offered free, individualized “supportive measures” (e.g. counseling, course related adjustments, modification of work or class schedules, escort services, increased security/monitoring of certain areas, mutual restrictions on contact between the parties) designed to restore or preserve equal access to education with or without a formal complaint. These, as well as other measures, may be part of a final remedy.

Upon filing a formal complaint, the complainant will be provided with a copy of this policy and its grievance procedures.

Written notice shall be provided to the respondent and the complainant advising that a formal complaint has been filed. The respondent shall be entitled to a presumption of innocence during investigation of the complaint. Both parties will be treated fairly throughout the investigation and shall be entitled to an unbiased investigator who has not prejudged the matter being investigated.

Complaints that fail to allege a violation of Title IX shall be dismissed without investigation. This does not preclude the school administration from investigating or addressing the underlying conduct under relevant codes of conduct or board policy.

## **Emergency Removal/Administrative Leave**

An emergency removal of a respondent from the education program or activity is permissible, provided that the District conducts an individualized safety and risk analysis and determines that emergency removal is necessary in order to protect a student or other individual from an immediate threat to physical health or safety and notice and an opportunity to challenge the decision is provided. This does not modify any rights under the Individuals with Disabilities Education Act (IDEA), Section 504 of the Rehabilitation Act of 1973, or the Americans with Disabilities Act (ADA).

An employee-respondent may be placed on administrative leave during the pendency of a grievance process.

## **Students**

### **Informal Resolution**

At any point in the formal complaint process, the Districtwide Title IX Coordinator, in his/her discretion, may offer to facilitate an informal resolution option such as mediation or restorative justice.

Both parties must give voluntary, informed written consent.

Either party has a right to withdraw consent at any time, in which case the formal investigation shall proceed.

The informal resolution process shall not be available if the complainant/victim is a student and the respondent is an employee.

### **Grievance Procedures**

The District will promptly and thoroughly investigate all formal complaints of sexual harassment in accordance with established grievance procedures.

District grievance procedures shall be established in the form of a regulation accompanying this policy.

The grievance procedure shall be used for the reporting and investigation of and response to a formal complaint of sexual harassment in the District's education program and activities against a person in the United States.

The District's grievances procedures shall be designed to comply with the regulation under Title IX as promulgated by the U.S. Department of Education, as it may be amended from time to time. Among other required provisions, the grievance procedures shall establish standards for fairness and equity including a requirement that the decision-maker not be the same individual as the Title IX Coordinator or the investigator, explain how to file a complaint, address required notice, set out timelines for various components of the investigation and adjudication process, establish and explain grounds for the dismissal of a complaint and provide and explain the appeal process available to both parties, include a presumption of innocence for the respondent, state the evidence standard to be used to determine responsibility, and require objective evaluation of all available evidence.

## **Students**

### **Training**

Training shall be provided to Title IX personnel in accordance with the regulation under Title IX as promulgated by the U.S. Department of Education, as it may be amended from time to time. Additional training may be provided to all school employees as deemed advisable.

Training materials used to train Title IX personnel shall be posted on the District's website.

### **Prohibition Against Retaliation**

Retaliation against any party, witness, or other participant to the grievance process is prohibited. Retaliation may form a basis for a complaint under this policy. The charging of a person with a code of conduct violation based upon a person making a materially false statement in bad faith in an investigation is not considered retaliatory.

### **Dissemination, Posting, and Discussion of Policy**

This policy, along with its accompanying regulation/grievance procedure, shall appear in the Student Handbook, be discussed with students at least annually and more often as needed, be posted in prominent and accessible locations in each school building and in the Board of Education offices, and be published on the District's website along with the name/title and contact information for the Title IX Coordinator.

### **Record Keeping**

The District must keep records related to reports of alleged sexual harassment for a minimum of seven years including investigation records, disciplinary sanctions, remedies, appeals, and records of any action taken including supportive measures. Additionally, Districts must also keep for a minimum of seven years any materials used to train Title IX Coordinators, investigators, decision-makers, and any employee designed to facilitate an informal process.

### **Alternate Complaint Procedures**

In addition, or as an alternative to the filing of a sex discrimination/sexual harassment complaint through the District's grievance procedure, a person may choose to file a complaint with the Office for Civil Rights of the United States Department of Education.

## Students

### Statement of Protected Rights

Application of this policy and its grievance procedure shall not be interpreted to restrict rights protected under the U.S. Constitution, including the right to free speech, to be free from self-incrimination, and to due process of law.

Legal References: Connecticut General Statutes

10-15c Discrimination in public schools prohibited. School attendance by five-year-olds.

United States Constitution, Article XIV.

Title IX of the Education Amendments of 1972, 20 U.S.C. 1681, *et seq.*

Title IX of the Education Amendments of 1972, 34 C.F.R. 106.1, *et seq.*

Title IX Regulation, 34 C.F.R. Part 106

20 U.S.C. 1092 (f)(6)(A)(v)

34 U.S.C. 12291 (a)(8), (a)(10), (a)(36)

*Franklin v. Gwinnett County Public Schools*, 503 U.S. 60 (1992)

*Gebser v. Lago Vista Independent School District*, 524 U.S. 274 (1998)

*Davis v. Monroe County Bd. Of Educ.*, 526 U.S. 629 (1999)

## Students

### Exploitation: Sexual Harassment

## Sexual Abuse Prevention and Education Program

### Definitions

**Sexual violence** is a multi-layered oppression that occurs at the societal and individual level and is connected to and influenced by other forms of oppression, in particular, sexism, racism and heterosexism. On the societal level it is the preponderance of attitudes, actions, social norms that perpetuate and sustain environments and behaviors that promote a cultural tolerance, acceptance, and denial of sexual assault and abuse. On an individual level sexual violence is a wide range of sexual acts and behaviors that are unwanted, coerced, committed without consent, or forced either by physical means or through threats.

**Sexual abuse** refers to coerced or forced sexual contact or activity that may be ongoing or occurs over time, often within a trusting relationship. Most victims know their perpetrators. Perpetrators are usually older than their victims and may trick or force them into gradually doing the sexual behavior. The sexual behavior may not be violent and may even be pleasurable to the child, who doesn't necessarily know it is wrong. Perpetrators of ongoing sexual abuse control the child/youth through secrecy, shame, or threats. Children cannot consent to sexual contact with adults or older youth, and sexual contact is considered abuse regardless of whether it includes touching or not.

**Sexual assault** usually refers to forced or unwanted sexual contact or activity that occurs as a single incident, as opposed to ongoing sexual abuse that may continue over time. It may also involve verbal or visual behaviors, or any type of pressure designed to coerce or force someone to join in the unwanted sexual contact or activity. The assault may involve a similar range of behaviors that are attempted or perpetrated against a victim's will or when a victim cannot consent because of age, disability, or the influence of alcohol or drugs. Sexual assault may involve actual or threatened physical force, use of weapons, coercion, intimidation, or pressure. The offender usually takes advantage of the victim's vulnerability. Anyone can perpetrate this type of abuse - a trusted friend or family member, a stranger, a casual acquaintance, or an intimate partner.

### Alternate Definition

**Sexual assault** can be defined as any type of sexual contact or behavior that occurs by force or without consent of the recipient of the unwanted sexual activity. This includes sexual activity such as forced sexual intercourse, forcible sodomy, child molestation, incest, fondling, and attempted rape. It includes sexual acts against people who are unable to consent either due to age or lack of capacity.

## Students

### Exploitation: Sexual Harassment

#### Program

The Amity Regional School District No. 5 (ARSD) shall implement the Sexual Abuse and Assault Awareness and Prevention Program identified or developed, in compliance with CGS 17a-101q, by the Department of Children and Families, in collaboration with the Connecticut Department of Education (CSDE) and other assisting entities, with the goal of informing students and staff about child sexual abuse and assault awareness and available resources. The ARSD program, for students in Grades 7-12 inclusive, shall include, but not be limited to:

1. Providing teachers instructional modules that may include, but not be limited to:
  - a. Training regarding the prevention and identification of, and response to, child sexual abuse and assault, and
  - b. Resources to further student, teacher, and parental awareness regarding child sexual abuse and the prevention of such abuse and assault.
2. Providing students age-appropriate educational materials designed for children in grades seven to twelve inclusive regarding child sexual abuse and assault awareness and prevention that may include, but not be limited to:
  - a. The skills to recognize:
    - i. Child sexual abuse and assault,
    - ii. Boundary violations and unwanted forms of touching and contact, and
    - iii. Ways offenders groom or desensitize victims.
  - b. Strategies to promote disclosure, reduce self-blame, and mobilize bystanders.
  - c. Actions that child victims of sexual abuse and assault may take to obtain assistance.
  - d. Intervention and counseling options for child victims of sexual abuse and assault.
  - e. Access to educational resources to enable child victims of sexual abuse and assault to succeed in school.
  - f. Uniform procedures for reporting instances of child sexual abuse and assault to school staff members.

## Students

### Exploitation: Sexual Harassment

The lessons should be evidence-informed, developmentally and age appropriate, and informed by the required curricula standards and performance indicators contained in the CSDE Guidelines (Section Three).

3. Implementing a child sexual abuse curriculum to provide age-appropriate information to teach students the difference between appropriate and inappropriate conduct in situations where child sexual abuse or sexual assault could occur and to identify actions a child may take to prevent and report sexual abuse or sexual assault. Students will be:
  - a. Provided with resources and referrals to handle these potentially dangerous situations.
  - b. Provided access to available counseling and educational support.

The ARSD Board of Education directs the Superintendent to develop administrative regulations to address the issues of students obtaining assistance, intervention and counseling options, access to educational resources, and procedures for reporting instances of child sexual abuse and assault.

A student shall be excused from participating in classroom instruction regarding sexual abuse and sexual assault upon receipt by the Principal of a written request from the student's parent or guardian.

Any student exempted from the sexual abuse and assault awareness and prevention program shall be provided, during the period of time in which the student would otherwise be participating in such program, an opportunity for other study or academic work.

### Reporting Child Sexual Abuse and Assault

Students shall be encouraged to disclose abuse to a trusted adult member of the staff, including but not limited to, teachers, administrators, nurses, coaches, and counselors. Child abuse reporting procedures will be followed for all acts of violence and sexual abuse against children as delineated in ARSD Board of Education Policy 5141.4 "Reporting of Suspected Child Abuse" and its accompanying regulations.

Connecticut General Statutes §17a-101, as amended, requires all school employees including the Superintendent of Schools, school teachers, substitute teachers, administrators, school guidance counselors, school paraprofessionals, licensed nurses, physicians, psychologists, social workers, coaches of intramural or interscholastic athletics, or any other person who in the performance of

## Students

### Exploitation: Sexual Harassment

his/her duties has regular contact with students and who provides services to ARSD students, who have reasonable cause to suspect or believe that a child has been abused, neglected, or placed in imminent risk of serious harm, to report such abuse and/or neglect in compliance with applicable state statutes.

An oral report by telephone or in person shall be made as soon as possible but no later than 12 hours to the Commissioner of Children and Families and to the Superintendent of Schools or his/her designee followed within 48 hours by a written report to the Department of Children and Families.

Sexual assault is a form of sex discrimination/sexual harassment. A student who has been sexually assaulted by a student, employee, or third party under the control of ARSD in a District education program or activity may report sexual harassment or file a formal complaint alleging sexual harassment by following the procedures set forth in Board Regulation 5145.5/4118.112/4218.112, Prohibition Against Sexual Harassment: Response to Reports of Sexual Harassment and Grievance Procedures for Formal Complaints (R5145.5/4118.112/4218.112). Any persons wishing to report the sexual harassment/sexual assault of a student occurring in a District program or activity may do so in accordance with R 5145.5/4118.112/4218.112. Forms for the reporting of sexual harassment and for filing a formal complaint of sexual harassment are available from the District's Title IX Coordinator and are also located on the District's website along with contact information for the District's Title IX Coordinator.

ARSD employees with notice or actual knowledge of the sexual harassment/sexual assault of a student occurring in a District educational program or activity must report this information to the District's Title IX Coordinator. The making of a report of sexual harassment is independent of a mandated reporter's obligation to report the sexual abuse or sexual assault of a student to the Commissioner of Children and Families and to the Superintendent of Schools. District employees shall make reports of child abuse or neglect in accordance with state law and ARSD Board of Education Policy 5141.4 "Reporting of Suspected Child Abuse," and its accompanying regulation.

(cf. [5131.911](#) - Bullying)

(cf. [5141.4](#) - Reporting of Suspected Child Abuse)

(cf. [5145.5](#) – Prohibition Against Sexual Harassment)

Legal Reference: Connecticut General Statutes:



**Students**

**Exploitation: Sexual Harassment**

[17a-101q](#) Statewide sexual abuse and assault awareness and prevention program (as amended by Section 415 of the June 2015 Special Session Public Act 15-5)

A Statewide K-12 Sexual Assault and Abuse Prevention and Awareness Program developed by DCF, SDE, and Connecticut Alliance (The Alliance) to End Sexual Violence.

## Students

### **Nondiscrimination – Transgender and Gender Non-Conforming Students**

The Amity Regional Board of Education (Board) provides an equal educational opportunity to all its students including gender minority students and prohibits discrimination in its educational programs and activities based upon sex or gender identity or expression. The Board directs the development of a regulation to accompany this policy to guide best educational practices for transgender and gender nonconforming students to ensure adherence with state and federal law. The regulation shall include as guidelines for schools and district staff. to address the needs of transgender and gender nonconforming students and clarify how applicable law should be implemented in the schools. The regulation shall include ,but is not limited to, guidance regarding commonly occurring situations where questions may arise about how to protect the legal rights or safety of such students The guidance cannot anticipate every situation that might occur with respect to transgender or gender nonconforming students, and the needs of each transgender or gender nonconforming student must be assessed on a case-by-case basis. In all cases, the goal is to foster a safe learning environment and to ensure that all students have equal access to all school programs and activities. Additionally, the regulation shall be designed to promote the safety, comfort and healthy development of the transgender or gender nonconforming student while maximizing the student's social integration and minimizing stigmatization of the student.

Students that feel they may have been discriminated against on the basis of sex or status as a transgender or gender non-conforming student should contact the District Title IX Coordinator and proceed in accordance with the Grievance Procedure set forth in Board Regulation 0521.1, Nondiscrimination-Grievance Procedure (R0521.1). Complaints will be investigated promptly and thoroughly, and the complainant shall be informed of the resolution of the complaint. If after investigation, discrimination is determined to have occurred, the District will take necessary action to eliminate the discrimination. If a complainant is not satisfied with the resolution of a complaint, an appeal may be taken in accordance with the Grievance Procedure set forth in the R0521.1, Nondiscrimination-Grievance Procedure.

If a transgender or a gender non-conforming student believes that he/she/they have been subject to sexual harassment based upon sex/status as a transgender or gender non-conforming student, he/she/they may file an informal report of sexual harassment or file a formal complaint of sexual harassment in accordance with Board Policy 5145.5/4118.112/4218.112 Prohibition Against Sexual Harassment and Board Regulation 5145.5/4118.112/4218.112, Prohibition Against Sexual Harassment: Response to Reports of Sexual Harassment and Grievance Procedures for Formal Complaints (R5145.5/4118.112/4218.112). .

Retaliation is prohibited against any individual who makes a good faith report of a suspected discrimination or sexual harassment violation or participates in a related investigation. Students

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with inquires or complaints related to this policy are referred to Board Policy 5145.45, Nondiscrimination and accompanying regulation, R5145.45, Nondiscrimination for further information including grievance procedures.

### Legal References

#### Connecticut General Statutes

10-15c Discrimination in public schools prohibited. School attendance by five-- year olds.

10-222 g Prevention and intervention strategy re bullying and teen dating and violence.

46a-51 Definitions.

46a-58 Deprivation of rights. Desecration of property. Placing of burning cross or noose on property. Penalty. Restitution.

10-209 Records not to be public. Provision of reports to schools.

PA 11-55 An Act Concerning Discrimination.

“Guidance on Civil Rights Protections and Supports for Transgender Students”, Connecticut State Department of Education, September 2017.

Family Educational Rights and Privacy Act of 1974, 20 U.S.C. 1232g.

Title IX of the Education Amendments of 1972, 34 CFR 106.

## STUDENTS

### Section 504 and Title II

#### **Students and Section 504 of the Rehabilitation Act of 1973 and Title II of the Americans with Disabilities Act of 1990**

Section 504 of the Rehabilitation Act of 1973 ("Section 504") prohibits discrimination against individuals with a disability in any program receiving Federal financial assistance. Similarly, Title II of the Americans with Disabilities Act of 1990 ("Title II" or "ADA") prohibits discrimination against individuals with a disability by state and local governments. To be protected under Section 504 and the ADA ("collectively, "Section 504/ADA"), an individual must (1) have a physical or mental impairment that substantially limits one or more major life activities; (2) have a record of such an impairment; or (3) be regarded as having such an impairment.

In order to fulfill its obligation under Section 504/ADA, Amity Regional School District No. 5 (ARSD) prohibits discrimination based on disability in access to, or treatment or employment in any of the services, programs or activities of the school system.

ARSD has specific responsibilities under Section 504 to identify, evaluate, and provide an educational placement for students who have a physical or mental impairment that substantially limits a major life activity. ARSD's obligation includes providing access to a free appropriate public education ("FAPE") for students determined to be eligible under Section 504/ADA. Under Section 504 FAPE is defined as the provision of regular or special education and related services that are designed to meet the individual educational needs of a student with a disability as adequately as the needs of students without disabilities are met and that are provided without cost (except for fees imposed on nondisabled students/parents).

If the parent/guardian of a student disagrees with the decisions made by the professional staff of ARSD with respect to the identification, evaluation, or educational placement of his/her child, the parent/guardian has a right to request an impartial due process hearing.

## STUDENTS

### Section 504 and Title II

In addition, a student or parent/guardian of a student may also file an internal grievance/complaint on these issues or any other type of discrimination on the basis of disability by or within ARSD by utilizing the grievance/complaint procedures outlined in the Board's Administrative Regulations Regarding Students and Section 504 of Rehabilitation Act of 1973 and Title II of Americans with Disabilities Act, and/or may file a complaint with the Office for Civil Rights, U.S. Department of Education ("OCR"):

Office for Civil Right, Boston Office  
U.S. Department of Education  
8<sup>th</sup> Floor  
5 Post Office Square,  
Boston, MA 02109-3921  
(617) 289-0111

Anyone who wishes to file a grievance/complaint with ARSD or who has questions or concerns about this policy should contact the Director of Pupil Personnel Services, the Section 504/ADA Coordinator for ARSD, at phone number 203-397-4820.

#### Legal References:

29 U.S.C. §§ 705, 794

34 C.F.R. Part 104

42 U.S.C. § 12101 et seq.

28 C.F.R. Part 35

Protecting Students with Disabilities, Frequently Asked Questions About Section 504 and the Education of Children with Disabilities, Office for Civil Rights (March 17, 2011), available at <http://www.ed.gov/about/offices/list/ocr/504faq.html>

Dear Colleague Letter, United States Department of Education, Office for Civil Rights (January 19, 2012)

## **Students**

### **Non-Discrimination**

The Amity Regional School District No. 5 (ARSD) Board of Education (Board) complies with all applicable federal, state, and local laws prohibiting the exclusion of students from any of its educational programs or activities because of race, religion, color, national origin, sex, sexual orientation, gender identity or expression, marital status, age, disability (including pregnancy), or other legally protected status subject to the conditions and limitations established by law.

It is the policy of the Board that any form of discrimination or harassment on the basis of race, religion, color, national origin, sex, sexual orientation, gender identity or expression, marital status, age, disability (including pregnancy), or any other legally protected status is prohibited in the District's educational program or activities. The Board's prohibition against discrimination or harassment in its educational programs or activities expressly extends to academic, nonacademic, and extracurricular activities including athletics.

It is also the policy of the Board to provide for the prompt and equitable resolution of complaints alleging discrimination or harassment on the basis of race, color, religion, age, sex, sexual orientation, gender identity or expression, marital status, national origin, disability (including pregnancy), or other legally protected status.

The Superintendent designates the Coordinator of Pupil Services as the District's Title IX Coordinator., As the District's Title IX Coordinator, the Coordinator of Pupil Services, who shall also be referred to as the Title IX Coordinator in addition to Coordinator of Pupil Services, is authorized to oversee the District's compliance with Title IX and its regulations and to address inquiries, reports and complaints of sex discrimination and sexual harassment.

The Superintendent designates the Director of Pupil Personnel Services as the District's Section 504/ADA Coordinator and Civil Rights Compliance Officer. As the ARSD Section 504/ADA Coordinator the Director of Pupil Personnel Services is authorized to address inquiries, reports and complaints of disability discrimination. As the ARSD Civil Rights Compliance Officer the Director of Pupil Personnel Services is authorized address inquires, reports, and complaints of all other forms of prohibited discrimination allegedly occurring in District programs and activities.

The Superintendent also designates each school building principal as a Building Level Civil Rights Compliance Officer to be responsible for initially addressing all complaints of discrimination or harassment at the school level except for those based upon sex and disability.

The Superintendent designates the Coordinator of Pupil Services as the Building Level 504/ADA Coordinator responsible for addressing complaints of disability discrimination on the building level. Building Level Coordinators will contact the Director of Pupil Personnel Services upon a report or complaint of discrimination or discriminatory harassment and will consult and coordinate with the Director of Pupil Personnel Services as deemed appropriate by the Director.

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### Non-Discrimination

Students with inquiries and complaints of discrimination or discriminatory harassment should contact the appropriate civil rights coordinator or compliance officer and follow the procedures set out in Board Policy 0521 Nondiscrimination (P0521) and Regulation R0521.1 Nondiscrimination-Grievance Procedures (R0521) with the exception of inquiries, reports, or complaints alleging sexual harassment or disability discrimination.

Student wishing to make a report or formal complaint of sexual harassment should refer to Board Policy 5145.5/4118.11/4218.112 Prohibition Against Sexual Harassment and its accompanying Regulation (R5145.5/4118.112/4218.112), which contains protocols for reporting sexual harassment and for the making of a formal complaint by students who are victims of sexual harassment and also contains grievance procedures that will be followed for formal complaints of sexual harassment.

Additionally, Board Policy 5145.42, 504 & Title II, may be consulted for matters related to student disability discrimination; Board Policy 5145.4 for matters related to nondiscrimination of transgender and gender non-conforming students, and Board Policy 5145.511 Exploitation: Sexual Harassment regarding the ARSD education program related to sexual exploitation.

#### Legal References:

Title IX of the Education Amendments of 1972, 20 U.S.C. § 1681, et seq.  
Title VI of the Civil Rights Act of 1964, 42 U.S.C. § 2000d, et seq.  
Americans with Disabilities Act, 42 U.S.C. § 12101, et seq.  
Section 504 of the Rehabilitation Act of 1973, 29 U.S.C. § 794, et seq.  
Connecticut General Statutes  
§ 10-15c and § 46a-81a, et seq. - Discrimination on basis of sexual orientation.  
Connecticut General Statutes § 1-1n, “Gender Identity or Expression” defined.

## Instruction

### Homebound/Hospital Instruction

Home and hospital instruction shall be a teaching service available, as mandated by Section 10-76d-15 of the Connecticut State Board of Education Regulations, to students who are unable to attend school for medical and/or mental health reasons for a period of two weeks or longer due to a verified medical reason as diagnosed by physician, psychiatrist, or Planning and Placement Team (PPT), or that the student's condition is such that the student may be required to be absent from school for short, repeated periods of time during the school year. The purpose of home or hospital instruction shall be to help students to keep up with their work even though unable to attend school because of their disability. Instruction provided pursuant to this policy shall maintain the continuity of the child's general education program and, in the case of a child with a disability, shall be provided so as to enable the child to continue to participate in the general education curriculum and to progress towards meeting the goals and objectives in the child's Individualized Educational Program (IEP).

The PPT shall consider the educational needs of a student with a disability who is medically complex, and the need for instruction is to be provided in accordance with an IEP when said student is not able to attend school. A student with a "medically complex" disability is one who has a serious, ongoing illness or chronic condition for at least a year, which requires prolonged or intermittent hospitalization and ongoing invasive medical treatments or medical devices to compensate for the loss of bodily functions.

Home instruction may also be provided for those students who have been excluded from regular school attendance for disciplinary reasons.

No teacher during the school year shall accept remuneration for tutoring students in his/her class, unless the student is designated as a homebound student and the tutor is employed by the Board of Education.

The Board directs the Superintendent to develop administrative regulations to guide the implementation of this policy.

Legal Reference: Connecticut General Statutes

Section [10-76d-15](#) of the Regulations of Connecticut State Agencies as amended.

[10-76d](#) Duties and powers of Boards of Education to provide special education programs and services.

[10-233a](#) et sec. Exclusion.