

**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, June 14, 2021 6:30 pm**

**100 Ohman Avenue, Orange, CT**

[CLICK HERE TO VIEW THIS MEETING](#)

*Public comment can be emailed to [pamela.pero@amityregion5.org](mailto:pamela.pero@amityregion5.org) by 2:00 p.m. on June 14, 2021. Emails received after 2:00 p.m. on June 14, 2021 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.*

*Per Governor Lamont's Executive Order from May 18, 2021, masks are still required in certain indoor settings, including schools, regardless of the age of the individual or their vaccination status. CSDE and CT DPH have directed schools to continue all existing mitigation measures through the end of the summer.*

- 1. CALL TO ORDER**
- 2. PLEDGE OF ALLEGIANCE**
- 3. APPROVAL OF MINUTES**
  - a. Board of Education Regular Meeting - May 10, 2021 Page 3
- 4. STUDENT REPORT**
  - a. Monthly Report
- 5. ONE BOOK, ONE AMITY SUMMER 2021**
- 6. PUBLIC COMMENT**
- 7. SUPERINTENDENT'S REPORT**
  - a. Personnel Report Page 12
  - b. Superintendent Report Page 14
  - c. 2021-2022 Reopening Plan Update
  - d. Peter Downhour, Amity Education Association President
- 8. CORRESPONDENCE**
- 9. CHAIRMAN'S REPORT**
  - a. Recognition of Departing Board Members - Patricia Cardozo, Sheila McCreven, Robyn Berke
  - b. Committee Reports
    1. ACES
    2. Ad Hoc School Safety
    3. CABA
    4. Curriculum
    5. District Health and Safety
    6. District Technology
      - a. Monthly Report Page 17

- 7. Facilities
  - a. Monthly Report *Page 18*
- 8. Finance
  - a. Discussion and Possible Action on Tuition Rate for 2021-2022 *Page 19*
  - b. Discussion and Possible Action on Contracts over \$35,000
    - 1. Food Services *Page 21*
    - 2. Telephone System *Page 22*
    - 3. Paving Phase III *Page 23*
  - c. Discussion of Monthly Financial Statements *Page 24*
  - d. Director of Finance and Administration Approved Transfers Under \$3,000 *Page 56*
  - e. Discussion and Possible Action on Budget Transfers of \$3,000 or More *Page 60*
  - f. Project Report – Informational *Page 69*
- 9. Policy
  - a. First Read
    - 1. Policy 4118.22 Code of Professional Responsibility *Page 71*
    - 2. Policy 4118.24 Staff-Student Non-Fraternization *Page 73*
    - 3. Policy 4118.51 Use of Social Media by Employees *Page 75*
  - b. Second Read
    - 1. Policy 4115 Evaluation and Support Program *Page 77*
    - 2. Policy 4117.4 Administrative Leave/Suspension/Dismissal *Page 82*
    - 3. Policy 4117.41 Suspension *Page 84*
    - 4. Policy 4118.11 Non-Discrimination/Equal Employment Opportunity *Page 86*
- 10. Personnel

**10. NEW BUSINESS**

**11. ITEMS FOR THE NEXT AGENDA** – Due to Chairperson by July 31, 2021

**12. ADJOURNMENT**



Jennifer P. Byars  
Superintendent of Schools

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  
MAY 10, 2021 REGULAR MEETING MINUTES  
6:30 P.M., 100 Ohman Avenue, Orange, CT

**BOARD MEMBERS PRESENT**

John Belfonti, Christopher Browe, Patricia Cardozo, Shannan Carlson, Paul Davis, Steven DeMaio, George Howard, Andrea Hubbard, Sheila McCreven (remote), Robyn Berke (remote), Dr. Jennifer Turner (remote)

**BOARD MEMBERS ABSENT**

Carla Eichler, Patrick Reed

**STUDENT REPRESENTATIVES PRESENT**

Alison Bowler (remote), Caroline Chen (remote)

**STAFF MEMBERS PRESENT**

Dr. Jennifer Byars, Theresa Lumas, Kathy Burke, Stephan Ciceron, Anna Mahon, 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. Board of Education Regular Meeting - April 19, 2021**

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

**b. Board of Education Annual District Meeting - May 4, 2021**

*MOTION by George Howard, Second by Christopher Browe, to approve minutes as submitted  
VOTES IN FAVOR, 7 (Belfonti, Browe, Cardozo, Davis, Howard, Hubbard, Turner)  
ABSTAINED, 4 (Carlson, DeMaio, Berke, McCreven)  
MOTION CARRIED*

**4. RECOGNITION OF STUDENTS**

**a. CABE Student Leadership Awards 2021**

Presented by Kathy Burke, Anna Mahon, and Dr. Jason Tracy

**b. SCASA Superintendents' Student Awards 2021**

Presented by Kathy Burke, Anna Mahon, and Dr. Jason Tracy

**5. STUDENT REPORT**

**a. Monthly Report**

**6. PUBLIC COMMENT**

Summarized by Chairperson Belfonti

**7. SUPERINTENDENT'S REPORT**

**a. Discussion and Possible Action on Diversity in Action Signage**

*MOTION by Christopher Browe, Second by Shannan Carlson, to approve the construction and installation of the Diversity in Action sign at Amity Regional High School as presented until the end of the 2021-2022 school year with possible bi-annual reviews.*

*MOTION withdrawn by Christopher Browe*

**b. Personnel Report**

**c. Superintendent Report**

**d. COVID-19 Updates**

**8. CORRESPONDENCE**

AMITY REGIONAL SCHOOL DISTRICT NO. 5 BOARD OF EDUCATION  
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**9. CHAIRMAN'S REPORT**

Chairperson Belfonti announced the following:

- The annual review of Dr. Byars will be done by the Board of Education in June 2021.
- The Board of Education will schedule an annual retreat for self-assessment in June 2021.

**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**

**7. Facilities**

**a. Monthly Report**

**8. Finance**

**a. Presentation and Discussion of First Quarter 2021 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. 1:1 Devices – FY21 funds**

*MOTION by Patricia Cardozo, Second by Shannan Carlson, to award the 1:1 student device lease to Whalley Computer Associates of Massachusetts, at the bid price of \$346,920.00 (\$319.00 per device with extended service of \$123.50 per device)*

*VOTES IN FAVOR, 11 (unanimous)*

*MOTION CARRIED*

**2. Copiers – FY22 funds**

*MOTION by Steven DeMaio, Second by Shannan Carlson, to authorize the Director of Finance to sign the Xerox contract for copiers, the laser printer management program, and the PaperCut Print Management*

*solution, for the monthly charge of \$11,929.26 for the period of June 6, 2021 through June 5, 2027*

*VOTES IN FAVOR, 11 (unanimous)*

*MOTION CARRIED*

**3. Student Accident Insurance – FY22 funds**

*MOTION by Paul Davis, Second by Andrea Hubbard, to award the Student Accident Insurance bid to H.D. Segur Insurance of Wallingford, CT at the bid price of \$33,000 for Interscholastic Sports, including Student Activities and \$2,910 for Catastrophic Accident Coverage*

*VOTES IN FAVOR, 11 (unanimous)*

*MOTION CARRIED*

**4. Field Drainage – AMSO – FY22 funds**

*MOTION by Christopher Browe, Second by Patricia Cardozo, to waive the bid process and award the field drainage project at Amity Middle School-Orange to Sports Turf of CT at a price of \$42,900.00*

*VOTES IN FAVOR, 11 (unanimous)*

*MOTION CARRIED*

**5. Roof Restoration and Repairs – ARHS – CNR funds**

*MOTION by Shannan Carlson, Second by Paul Davis, to waive the bid process and award the roofing restorations and repairs to Tremco Industries for \$395,141.40*

*VOTES IN FAVOR, 11 (unanimous)*

*MOTION CARRIED*

**c. Discussion and Possible Action on Healthy Food Certification**

*MOTION by Patricia Cardozo, Second by George Howard:*

- 1. Pursuant to C.G.S. Section 10-215f, the Board of Education or governing authority certifies that all food items offered for sale to students in the schools under its jurisdiction, and not exempted from the Connecticut Nutrition Standards published by the Connecticut State Department of Education, will comply with the Connecticut Nutrition Standards during the period of July 1, 2021, through June 30, 2022. This certification shall include all food offered for sale to students separately from reimbursable meals at all times and from all sources including but not limited to school stores, vending machines, school cafeterias, culinary programs, and any fundraising activities on school premises sponsored by the school or non-school organizations and groups.*
- 2. The Board of Education or governing authority will allow the sale to students of food items that do not meet the Connecticut Nutrition Standards provided that the following conditions are met: 1) the sale is in connection with an event occurring after the end of the regular school day or on the weekend; 2) the sale is at the location of the event; and 3) the food items are not sold from a vending machine or school store. An “event” is an occurrence that involves more than just a regularly scheduled practice, meeting, or extracurricular activity. For example, soccer games, school plays, and interscholastic debates are events but soccer practices, play rehearsals, and debate team meetings are not. The “regular school day” is the period from midnight before to 30 minutes after the end of the official school day. “Location” means where the event is being held.*

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3. *The Board of Education or governing authority will allow the sale to students of beverages not listed in Section 10-221q of the Connecticut General Statutes provided that the following conditions are met: 1)the sale is in connection with an event occurring after the end of the regular school day or on the weekend; 2) the sale is at the location of the event; and 3) the beverages are not sold from a vending machine or school store. An “event” is an occurrence that involves more than just a regularly scheduled practice, meeting, or extracurricular activity. The “school day” is the period from midnight before to 30 minutes after the end of the official school day. “Location” means where the event is being held and must be the same place as the beverage sales.*

VOTES IN FAVOR, 11 (unanimous)

MOTION CARRIED

**d. Discussion and Possible Action on Capital Projects Change Orders and Budget Transfers**

*MOTION by Shannan Carlson, Second by Steven DeMaio, to consider all change orders and budget transfers listed at the same time*

VOTES IN FAVOR, 11 (unanimous)

MOTION CARRIED

*MOTION by Christopher Browe, Second by Shannan Carlson, to approve the following:*

- *Change order 1a to include electrical conduits, trenching and backfill to Comboxes (8) and empty conduits to home side poles for cameras totaling \$11,133.00*
- *Change order #1 for price increases of \$59,060.13*
- *A transfer from Bond Contingency Account to the HVAC Project Account for increased engineering costs.*

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
17-00-15-0053-5720	Bond Contingency	\$10,000	
17-00-15-0048-5720	HVAC Projects		\$10,000

VOTES IN FAVOR, 11 (unanimous)

MOTION CARRIED

*MOTION by George Howard, Second by Patricia Cardozo, to approve the following:*

- *A transfer from Bond Contingency Account to the Athletic Project Account. Add empty conduits to 8 locations and to the home side poles for cameras at the stadium at Amity High School:*

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
17-00-15-0053-5720	Bond Contingency	\$11,133	
17-00-15-0047-5720	Athletic Projects		\$11,133

- *A transfer from Bond Contingency Account to the Athletic Project Account to cover the price increases change order #1.*

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
17-00-15-0053-5720	Bond Contingency	\$59,061	
17-00-15-0047-5720	Athletic Projects		\$59,061

VOTES IN FAVOR, 11 (unanimous)

MOTION CARRIED

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- e. **Discussion of Monthly Financial Statements**
- f. **Director of Finance and Administration Approved Transfers Under \$3,000**
- g. **Discussion and Possible Action on Budget Transfers of \$3,000 or More**

*MOTION by Patricia Cardozo, Second by Steven DeMaio, to approve the following budget transfer to cover the leasing of 784 devices.*

<i>ACCOUNT NUMBER</i>	<i>ACCOUNT NAME</i>	<i>FROM</i>	<i>TO</i>
05-15-2512-5255	Medical	\$55,010	
05-14-2350-5330	Professional Technical Services		\$55,010

VOTES IN FAVOR, 11 (unanimous)  
MOTION CARRIED

*MOTION by Shannan Carlson, Second by Christopher Browe, to approve the following budget transfer to cover the cost of filling the fuel tank at Bethany Middle School.*

<i>ACCOUNT NUMBER</i>	<i>ACCOUNT NAME</i>	<i>FROM</i>	<i>TO</i>
03-14-2600-5621	Natural Gas	\$15,300	
01-14-2600-5620	Fuel Oil		\$15,300

VOTES IN FAVOR, 11 (unanimous)  
MOTION CARRIED

**h. Discussion and Possible Action on Standard Year-End Transfers**

*MOTION by Paul Davis, Second by Andrea Hubbard, to authorize the Director of Finance and Administration to make the necessary budget transfers to salary and benefit accounts and to pay other standard charges. These budget transfers may exceed \$3,000. The Director of Finance and Administration will report all budget transfers made to the Amity Finance Committee and Amity Board of Education.*

VOTES IN FAVOR, 11 (unanimous)  
MOTION CARRIED

**i. Other Information Items**

- 1. **Capital Project Expenditure Report- informational**
- 2. **Food Service FY22**

**9. Policy**

**a. First Read**

- 1. **Policy 4115 Evaluation and Support Program**

2. **Policy 4117.4 Administrative Leave/Suspension/Dismissal**
3. **Policy 4117.41 Suspension**
4. **Policy 4118.11 Non-Discrimination/Equal Employment Opportunity**

**b. Second Read**

1. **Policy 4111 Recruitment and Selection**
2. **Policy 4111.3 Minority Recruitment**
3. **Policy 6172.4 Title 1 Parent and Family Engagement**
4. **Policy 4112.8 Nepotism: Employment of Relatives**

*MOTION by Shannan Carlson, Second by Christopher Browe, to vote on all Second Read policies at the same time:*

- *Policy 4111 Recruitment and Selection*
- *Policy 4111.3 Minority Recruitment*
- *Policy 6172.4 Title 1 Parent and Family Engagement*
- *Policy 4112.8 Nepotism: Employment of Relatives*

*VOTES IN FAVOR, 11 (unanimous)*

*MOTION CARRIED*

*MOTION by Steven DeMaio, Second by Shannan Carlson, to approve all Second Read policies at the same time:*

- *Policy 4111 Recruitment and Selection*
- *Policy 4111.3 Minority Recruitment*
- *Policy 6172.4 Title 1 Parent and Family Engagement*
- *Policy 4112.8 Nepotism: Employment of Relatives*

*VOTES IN FAVOR, 11 (unanimous)*

*MOTION CARRIED*

**c. Informational**

1. **Policy 5145.5/4118.112/4218.112 Prohibition Against Sexual Harassment**

**10. Personnel**

*MOTION by Shannan Carlson, Second by Christopher Browe, to enter Executive Session and invite Dr. Byars and Theresa Lumas for the following:*

- *Discussion of Contracts and Salary Increases for Unaffiliated Employees for the 2021-2022 School Year*
- *Discussion of Amity Administrator Contract*
- *Update on Paraeducator and Nurses Negotiations*

*VOTES IN FAVOR, 11 (unanimous)*

*MOTION CARRIED*

- a. **Discussion of Contracts and Salary Increases for Unaffiliated Employees for the 2021-2022 School Year (Executive Session)**
- b. **Discussion of Amity Administrator Contract (Executive Session)**
- c. **Update on Paraeducator and Nurses Negotiations (Executive Session)**

ENTERED EXECUTIVE SESSION AT 8:45 P.M.

EXITED EXECUTIVE SESSION AT 9:00 P.M.

- d. **Possible Action on Contracts and Salary Increases for Unaffiliated Employees for the 2021-2022 School Year**

*MOTION by Patricia Cardozo, Second by Robyn Berke, to approve the following:*

- *Contracts and Salary Increases for Unaffiliated Employees for the 2021-2022 School Year*

*VOTES IN FAVOR, 11 (unanimous)*

*MOTION CARRIED*

**10. NEW BUSINESS**

- a. **Discussion and Possible Action on Meeting Model for the June 14, 2021 Amity Finance Committee meeting and Board of Education meeting**

*MOTION by Sheila McCreven, Second by Shannan Carlson, to continue hybrid meeting model and allow Public Comment via email through June 30, 2021*

*VOTES IN FAVOR, 10 (Belfonti, Browe, Cardozo, Carlson, Davis, Howard, Hubbard, Berke, McCreven, Turner)*

*VOTES OPPOSED, 1 (DeMaio)*

*MOTION CARRIED*

AMITY REGIONAL SCHOOL DISTRICT NO. 5 BOARD OF EDUCATION  
MAY 10, 2021 REGULAR MEETING MINUTES  
6:30 P.M., 100 Ohman Avenue, Orange, CT

**11. ITEMS FOR THE NEXT AGENDA** – Due to Chairperson by May 28, 2021

**12. ADJOURNMENT**

*MOTION by Robyn Berke, Second by Paul Davis, to adjourn meeting  
VOTES IN FAVOR, 11 (unanimous)  
MOTION CARRIED*

Meeting adjourned at 9:10 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*

**June 14, 2021**

**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:

*Michael Battista* – F/T Career & Technology Education Teacher - Mike brings to Amity 7 years of experience in the Career and Technology field, most recently teaching Graphic Design and Engineering at Haddam-Killingworth High School. Prior to that, Mike was a member of the United States Air Force (CT. Air National Guard) for 6 years. He earned his Bachelor's Degree in Technology Education from Central Connecticut State University and his Master's Degree in Technology from Augustana University.

*Danielle Carbone* – F/T Biology Teacher – Danielle completed her student teaching at Bunnell High School in the Stratford Public School District. She then served as a district tutor in Stratford PS across all grade levels. Danielle earned her Bachelor's Degree in Biology and her Master's Degree in Teaching both from Sacred Heart University.

• Amity Regional Middle School – Bethany: **NONE**

• Amity Regional Middle School – Orange:

*Jennifer Zoppi* – F/T School Psychologist – Jennifer joins the Amity Orange staff, upon her return to Connecticut, with an extensive 13 years of experience as a School Psychologist. She began her career in 2008 in North Haven Public Schools prior to her move to Los Angeles where she continued as a School Psychologist in Pasadena and Lennox, California. Jennifer earned her Bachelor's Degree in Psychology and her Master's Degree and Sixth Year Certificate in School Psychology all from Southern Connecticut State University.

*Taylor Schneider* – F/T Science Teacher – Taylor joins the Amity team bringing 6 years of experience as a Science Teacher, most recently from Capital Preparatory Harbor School in Bridgeport. While there, she served as the team leader for grades 9 and 10 and also served as the teacher representative for the Board of Directors. Taylor earned her Bachelor's Degree in Physiology from the University of Colorado, Boulder.

**NEW HIRES-BENCH/LONG TERM SUBSTITUTES: NONE**

**NEW HIRES-NON-CERTIFIED: NONE**

**NEW HIRES-COACHES:**

*Andre Puleo* – Boys Outdoor Track Coach - 2021 Spring Season – Amity Middle School-Bethany

*Thomas Norton* – Baseball Coach - 2021 Spring Season – Amity Middle School-Orange

*Robert Murphy* – Girls Outdoor Track Coach - 2021 Spring Season – Amity Middle School-Bethany

*Maura Regan* – Boys Outdoor Track Coach - 2021 Spring Season – Amity Middle School-Orange

### **NEW HIRES-COACHES: (CONT.)**

*Dominique Burrell* – Asst. Boys Outdoor Track Coach - 2021 Spring Season – Amity Reg. High School

*Cory Balog* – Asst. Boys Lacrosse Co-Coach - 2021 Spring Season – Amity Reg. High School

*Nicholas Zukauskas* – Asst. Boys Lacrosse Co-Coach - 2021 Spring Season – Amity Reg. High School

### **TRANSFERS:**

*Kimberly Doran* – 10 month Category I Administrative Assistant at Amity Reg. High School to the position of 12 month Category III Administrative Assistant at Amity Reg. High School, effective July 1, 2021.

*Kristen McNamara* – 10 month Category I Administrative Assistant at Amity Reg. High School to the position of 12 month Category II Administrative Assistant at Amity Middle School-Bethany, effective July 12, 2021.

*Brendan Moss* – FT Special Education Teacher at Amity Reg. High School to the position of FT Special Education Teacher at Amity Middle School-Bethany, effective 2021-2022 school year.

*Michael Gelada* – .6 FTE Math Teacher at Amity Regional High School to 1.0 FTE Math Teacher at Amity Regional High School, effective 2021-2022 school year.

*Taylor Affinito* – 1.0 FTE Speech and Language Pathologist at Amity Middle School-Bethany and Amity Middle School-Orange to the position of 1.0 FTE Speech and Language Pathologist at Amity Middle School-Orange and Amity Transition Academy, effective 2021-2022 school year.

*Jodi Everone* – 1.0 FTE Speech and Language Pathologist at Amity Regional High School to the position of 1.0 FTE Speech and Language Pathologist at Amity Regional High School and Amity Middle School-Bethany, effective 2021-2022 school year.

*Daniel Proto* – FT Art Teacher at Amity Middle School-Bethany to the position of FT Visual Arts Teacher at Amity Regional High School, effective 2021-2022 school year.

*Elizabeth Smolinski* – FT Art Teacher at Amity Regional High School to the position of FT Art Teacher at Amity Middle School-Bethany, effective 2021-2022 school year.

*Cynthia Jevarjian* – 10 month Category I Administrative Assistant in the Library/Media Center at Amity Regional Middle School-Orange to the position of 10 month Category I Administrative Assistant in the Library/Media Center at Amity Regional High School, effective 2021-2022 school year.

### **RESIGNATIONS:**

*Caitlin Magnan* – Girls Volleyball Coach ~ Amity Regional High School, eff. 05/24/2021

### **RETIREMENTS:**

*Mary Lou Giordano* – School Nurse, Amity Regional High School, eff. 06/30/2021

*MaryBeth Mahon* – Health Teacher, Amity Middle School-Bethany, eff. 06/30/2021

*Emily McGalliard* – Reading Teacher, Amity Middle School-Orange, eff. 06/30/2021

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



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

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

Superintendent's Report – June 2021

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**

**Standardized State Testing Completed:** Standardized State testing for Smarter Balanced Assessments (SBA) and the Next Generation Science Standards (NGSS) Assessment were administered during the month of May. The SBA assessments were administered to students in grades 7 & 8 in English Language Arts (ELA) and Math. The NGSS assessment was administered to students in grades 8 & 11 in Science. Amity had an average participation rate of 97% for SBA, 95% for 8<sup>th</sup> grade NGSS, and 96% for 11<sup>th</sup> grade NGSS (those numbers include remote and in-person learners).

**10<sup>th</sup> Grade Career Fair Program:** In lieu of an in-person career fair for 10<sup>th</sup> grade students, virtual interviews were conducted with Amity alumni and organized to be accessible to students during a special homeroom session in mid-May. The following message was sent to faculty/staff to also share with current students:

“We typically host a career fair for them each year which brings in local community members to talk about their careers. Due to COVID and restrictions, we had to go a different route. The use of Zoom has allowed us to open these [presentations](#) to a wider audience so we focused on Amity alums this year and are excited to present about 25 interviews with our former students. It's amazing to see what they are up to these days and get a chance to learn from them. They all mention the impact teachers and staff at Amity have had on their lives so I hope you can take some time to watch. It's another reminder what a difference you make in their lives every day.”

**2021 AP Exam Administration:** The Advanced Placement (AP) exam administration was altered this year to include both in-person and virtual testing. Despite the disruption, Amity Regional High School still had roughly 370 students who sat for over 700 exams. Huge thanks to the AP testing coordinators for managing the testing throughout the entire month of May.

**AMSO End of Year Showcases:** Several AMSO students shared their talents through virtual performances in June. The virtual presentations and performances highlight some of the outstanding work students did in the creative arts this year – including visual arts, musical performances, and the literacy magazine.

**Reader's Workshop Implementation Continues:** Middle School English Teachers and Reading Specialists will meet virtually on June 21 and 22, 2021 to continue Readers Workshop training. The focus of this training is to learn about the structure of the Workshop Model and to work collaboratively in preparation for summer curriculum writing. Andrea Drewry has been appointed as the middle school Literacy Coach for both AMSB and AMSO. Mrs. Drewry will provide Readers Workshop coaching to the ELA middle school teachers as part of the implementation of the Readers Workshop Model.

**Hamden Adult Education Graduates:** A virtual graduation was held on May 27, 2021 for 8 Amity students who successfully attended the Hamden Adult Education Program and attained their Amity Regional High School diploma. Dr. McPadden attended the virtual celebration.

**AMSB Shakesperience:** AMSB 8<sup>th</sup> graders all took part in the Shakesperience production on May 25, 2021. The students were able to be full participants in the event where they were the actors who helped literature come to life. The event connected the learning in the classroom to hands on activities and fun was had by all.

**SAILS and Unified End of Year Round Up:** Students from the middle school SAILS, high school SAILS, and Amity Transition Academy joined together for a day of field and vocational activities. Unified Sports celebrated a successful year with a final end of the year practice. Unified Sports was able to compete in several interscholastic activities throughout the school-year; our student athletes loved the ability to be with their peers!

**ESSER II Summer School Programs:** Plans are being finalized for several summer school programs supported by ESSER II Funding. These include programs for current 6<sup>th</sup>, 7<sup>th</sup>, and 8<sup>th</sup> grade students, as well as free credit recovery programs for high school students. Additionally, a counseling support program for school reintegration for disengaged learners will be run throughout the summer and immediately prior to the start of school in August.

**ARHS Counselors Visit Rising 8<sup>th</sup> Graders:** During the final days of the school year, ARHS school counselors visited both middle schools to meet their incoming 8<sup>th</sup> graders, answer questions, and allow our Class of 2025 to put faces to the names of their counselors. The event, organized by Jill LaPlante and Eric Rothbart from ARHS, matched students with their future high school counselors and allowed for the sharing of information and student questions. These counselors will stay with their students for the next four years, and this meeting was a wonderful way to begin building the student-counselor connection.

## Resources

**Multi-Use of Parking Lot Tent:** In order to prepare for end-of-year activities, the district provided a tent that was erected in June. We have been able to use it as a multi-functional space, holding both senior and junior proms, senior breakfast, and musical rehearsals and its anticipated shows in the tent throughout the month of June.

**CSDE BSE Grant Awarded:** The Pupil Services Department applied and was awarded a \$20,000 stipend through the CSDE BSE in response to the COVID-19 pandemic. Targeted professional development is being planned to support mental health, school engagement, and reading supports/recovery as it relates to the pandemic. These stipend funds will be used to provide professional learning and clinical supervision to School Psychologists/Social Workers/School Counselors on Dialectical Behavior Therapy (DBT) through a partnership with Dr. Rebecca Kamody at the Yale Child Study Center. Additionally, professional learning will be offered to staff on structured literacy with Dr. McCombes-Tolis from Fairfield University.

**AMSO Repurposing Furniture:** The AMSO is repurposing alternate seating in the media center to better utilize the additional space that was made available due the removal of outdated computer table bookcases that are no longer in use with the one-to-one device program. The additional space will be utilized to increase student collaboration across classes and teams.

## Climate

**End-of-Year In-Person Activities:** Due to the hard work, organization and forward planning of many staff and students, we held many end-of-year activities that have become traditions at ARHS including: senior picnic at Holiday Hill, senior prom, junior prom, senior awards night (in person), the BOE recognition ceremony, senior breakfast, graduation rehearsals, the A.C.T. musical, and in-person graduation for the Class of 2021!

**Diversity in Action Plaque Installation:** On Monday, June 7, 2021, the Diversity in Action Club revealed the newly-mounted plaques at ARHS to display our commitment to inclusion and honoring diversity. The plaques are located at the entrance to the school in the vestibule and the rear athletic entrance.

**AMSO Moving Up Ceremony:** Congratulations to our 8<sup>th</sup> grade students for moving on to high school. The ceremony was held on the high school lacrosse field. We appreciate the PTSO for providing the decorations and water for our students.

**AMSB Stepping Up Ceremony:** The 8<sup>th</sup> graders of AMSB participated in a drive-up ceremony on June 7<sup>th</sup> after some last-minute changes. Though it was not the in-person ceremony that we all had hoped for, the event was well received and allowed for administrators and teachers to spend a few moments of reflection, laughter, and celebrations as we wished each student well on the next four years of their educational journey. Best wishes to the new Amity High School class of 2025!

**8<sup>th</sup> Grade End of Year Treats from the AMSO PTSO:** Thanks to the AMSO PTSO for purchasing Amity t-shirts and the school yearbook for every 8<sup>th</sup> grade student. These gifts made for a festive day as students enjoyed signing yearbooks while all wearing Amity gear.

**June 2<sup>nd</sup> at AMSB:** All 8<sup>th</sup> graders were welcome to participate in our annual trip to Holiday Hill. The staff and students had a wonderful day and beautiful weather to participate in games and outdoor events as they celebrated their hard work and kinship after a difficult year of school. All 7<sup>th</sup> grade students participated in a field day event at AMSB. This traditional way to celebrate all of the hard work students have put in over the year was a wonderful way to restore some normalcy for students. The class had a series of events that were organized by the teachers and helped to build teamwork and communications skills.

**Supportive End-of-Year Song Parodies:** As a result of the March professional learning day, ARHS teachers Michael Cofrancesco and Deb Demeo created two versions of the song “I Will Survive” (originally sung by Gloria Gaynor): one for seniors and one for [faculty/staff](#).

**ACT Summer Camp Runs Again:** The Amity Theatre Camp is in the process of registering students who would like to participate for an exciting program of theatre, song, and dance this summer.

**May Development Day-Link Crew:** For the first time in 2 years the newly elected Link Crew Leaders were able to complete an in-person initial day of training called “May Development Day.” This offers the leaders a chance to participate in ice breakers and get to know each other through the lens of being leaders together. Their formal training will take place in August prior to the official Link Crew Welcome for incoming 9<sup>th</sup> graders on August 27, 2021.



*Diversity in Action Plaque Installation – June 7, 2021*

June, 2021

## May Ticket Summary

Tickets addressed and closed: 51

Tickets open: 0

## HS Student Help Desk

Students helped: 198

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 collection of both students and staff is 98% complete.
- Identified projects that are eligible for security grant funds and requesting quotes:
  - Additional RFID door access
  - Additional Security Cameras
  - Phone system replacement

### Projects in process:

- Classroom scanners for attendance:
  - Initial deployment is in small “pilot” groups and is continuing.
  - Full deployment will follow after successful pilot.
- We have received 16 more indoor/outdoor security cameras and are working with building administration to identify exact locations for installation.
  - Many of the locations, including replacements, will require new data cable to be pulled.
  - We have identified more than 16 locations in need and have begun to prioritize locations while documenting future needs.
- Options for off-site, cloud-based backup repositories are being assessed to address the need for isolated storage of critical data backups.
  - Currently cost for the amount of storage space needed has been an obstacle, as a result we are also exploring cost associated with building our own “cloud.”
  - Also looking into possibility of building a shared cloud with BOWA districts
- Technicians have been addressing support tickets for both students and staff to support the transition to the current learning model.
- New student-led help desk ready to be staffed by student workers:
  - Student applicants are being sought and interviews being scheduled.
  - A limited student workforce has begun staffing the help desk on a part-time basis.
- Techs are currently going through all collected teacher devices and performing maintenance and upgrades.
  - Devices should be ready for redeployment by July 1 for teachers who wish to pick them up for summer work.
- Techs will move on to student devices as soon as teacher devices are complete.
- 782 new devices for incoming 7th grade and current 10th grade students will arrive on June 15. After receiving and asset tagging they will be imaged and added to the domain and ready for deployment late summer with the existing student fleet.

# Amity Regional School District No. 5

CLEAN  
SAFE  
HEALTHY  
SCHOOLS

## Facilities Department Monthly Report

### Completed Projects:

- New light fixtures have been installed in both gyms at AMSO and AMSB by our in-house maintenance staff.
- Spring grounds cleanup was completed.
- Preventative maintenance on all the chillers and air handling units was completed by our in-house HVAC technician.
- The ADA-compliant walkway to the Field Three bleachers was completed

### Projects in process:

- ARHS Track and Field project is underway: long and high jump pits have been formed and poured, new light pole foundations have been poured, scoreboard is installed, and to date track is being formed and prepped for concrete. Concrete is scheduled for an early June pour, and the all-weather field installation is expected late June or early July.
- Reviewing the District's storage needs and options for the modular building in Bethany.
- The acoustical study has been completed at AMSB and AMSO, and we are awaiting the report.
- The student-led project of storage building construction is complete. It is just awaiting the installation of the roll-up door, which is on order from the vendor.
- The air handler replacement/Guidance fit-out at ARHS is underway. Actual construction will commence on June 9th.
- The replacement of the cooling tower piping at ARHS was awarded to F+F Mechanical and is scheduled; however parts are on backorder. We are looking at a late June installation.
- Roof restoration and repair work at ARHS is being scheduled and set to commence mid-June.
- The bids were received for the final phase of paving at ARHS and are being reviewed. Paving is expected to commence late July.
- We are looking to continue security enhancements at all buildings through a new security grant that became available.

### Outstanding issues to be addressed:

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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**Kathleen Kovalik**  
**Assistant Director of Finance and Administration**  
[kathleen.kovalik@amityregion5.org](mailto:kathleen.kovalik@amityregion5.org)

**Phone (203) 397-4801**  
**Fax (203) 397-4864**

To: Dr. Jennifer P Byars, Superintendent of Schools  
From: Kathleen Kovalik, Assistant Director of Finance and Administration  
cc: Theresa Lumas, Director of Finance and Administration  
Re: Tuition Rate 2021-2022  
Date: June 1, 2021

I am recommending the tuition rate for the 2021-2022 school year be set at \$19,170.00 for non-resident students. This tuition increase represents a 3.084% increase or \$574.00 above the current tuition rate of \$18,596.00. In the current school year there were six non-resident students enrolled, including the child of a staff member. Two students graduated in June 2021. The 2021-2022 budget includes revenue from three tuition students. The non-resident tuition rate is calculated using the State Department of Education Net Current Expenditure per Pupil formula indexed for 2021-2022.

I am also proposing the following rate for non-resident tuition students identified as special education. The base rate is \$19,623.00. This is derived from the Net Current Expenditure Per Pupil indexed for the 2021-2022 school year. Additional services required by a student's Individual Education Plan (IEP) will be added to the base tuition rate. These services are billed based on the actual costs the District incurs.

Examples of additional services are assistive technology, hearing direct services, speech and language, occupational and physical therapy, clinical evaluations, special equipment, behavioral therapy, independent consultations, extended school year programs, outplacement, special transportation, and any other specific services contracted for the student.

Current pricing for services listed below provide an estimate of costs but invoices will be computed on actual costs.

Behaviorist - \$122/hr.  
Speech/Language - \$67/hr.  
Assistive Technology - \$153/hr.  
Occupational/Physical Therapy - \$92/hr.  
Hearing direct services - \$255/hr.  
Hearing Consults - \$270/hr.  
Counseling (SW/Psych) - \$66/hr.

Further, if the District needs to hire additional staff to provide special services, such as a 1-to-1 paraeducator or a nurse to provide other than routine care, these costs will be added to the base tuition and other services listed above. The rate for these additional staffing services would be based on contracted salaries and benefits.

Tuition invoices are mailed in July to the parents or guardians of enrolled non-resident students. The District accepts payment in full, in two installments, or at a minimum monthly installments due on the first of each month from September to June.

*Amity Finance Committee:*

***Move to recommend that the Amity Board of Education...***

*Board of Education:*

***Move to approve...***

***... the non-resident tuition rate for 2021-2022 school year at \$19,170.00; and the non-resident Special Education base tuition rate for 2021-2022 school year at \$19,623.00 plus any additional services***

# AMITY REGIONAL SCHOOL DISTRICT NO. 5

Bethany Orange Woodbridge  
25 Newton Road, Woodbridge Connecticut 06525



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**Kathleen Kovalik**  
*Assistant Director of Finance and Administration*

**Phone (203) 397-4801**  
**Fax (203) 397-4864**

To: Dr. Jennifer P. Byars, Superintendent of Schools  
From: Kathleen Kovalik, Assistant Director of Finance and Administration  
cc: Theresa Lumas, Director of Finance and Administration  
Re: Food Service Management Contract Amendment  
Date: June 2, 2021

I am recommending that the Board of Education extend its contract to operate the food service program for the year 2021-2022 with Compass Group, USA, Inc. (Chartwells). The District is entering the sixth year of an original five-year contract with Chartwells. The one year extension of the contract was approved by the CSDE due to COVID-19. The State Department of Child Nutrition reviews and approves food service bid documents, contract language and amendments. The amendment was approved at the State level and must be fully executed prior to July 1. The amendment proposes a negotiated 3.5% increase which is less than the maximum allowed based on the consumer price index (CPI) as outlined in the original agreement. The increase applies to the Management Fee rate and the Administrative Fee rate.

*“Section 12.11(C) is being amended to reflect that Chartwells Management Fee shall be a flat rate of Two Thousand Three Hundred and Thirty-Six Dollars and Eighty-Two Cents (\$2,336.82) per month for 10 months (September through June).*

*This increase is based on Section 12.11(G) of the Agreement permitting the CPI adjustment of 3.5%, or \$79.02 added to the existing Management Fee of \$2,257.80.*

*Section 12.11(D) is being amended to reflect that Chartwells Administrative Fee shall be a flat rate of Eight Thousand Five Hundred and Sixty Dollars and Three Cents (\$8,560.03) per month for 10 months (September through June).*

*This increase is based on Section 12.11(G) of the Agreement permitting the CPI adjustment of 3.5%, or \$289.47 added to the existing Administrative Fee of \$8,270.56.”*

**For Amity Finance Committee:**

***Move to recommend that the Amity Board of Education award a one-year contract extension for 2021-2022 to Compass Group, USA, Inc. (Chartwells) per the proposed Amendment and the Director of Finance and Administration is authorized to sign the Amendment.***

**For Amity Board of Education:**

***Move to award a one-year contract extension for food service operations for 2021-2022 to Compass Group, USA, Inc. (Chartwells) per the proposed Amendment and the Director of Finance and Administration is authorized to sign the Amendment.***

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



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

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

To: Dr. Jennifer Byars, Superintendent of Schools

From: Theresa Lumas, Director of Finance and Administration

Re: Award of Contracts of \$35,000 or More

Date: May 5, 2021

**Fiscal Year 2020-21**

**1. Technology Telephone System:**

The District's phone system is no longer supported and is on the capital plan for replacement. The State is offering another round of security grant funding and the phone system is an eligible item. The District must allocate funding for the project in order to be eligible for reimbursement. The reimbursement rate averages 35% between all three towns. An RFP was posted for VoIP systems on premises and cloud based. A mandatory site visit was held on June 1, 2021. 19 vendors attended. Proposals were due on June 9, 2021 and 15 vendors submitted proposals. The District will apply for reimbursement from the State Department of Education. The reimbursement rate is approximately 35%. The District is required to secure funding first.

The Director of Technology and Network Administrator are reviewing all proposals and a recommendation will be brought forward to Monday's meeting.

**Amity Finance Committee:**

*Move to recommend the Amity Board of Education...*

**Amity Board of Education:**

*Move to ...*

*award the implementation of a new phone system to \_\_\_\_\_ at a price of \_\_\_\_\_.*

## **Capital Nonrecurring Funds**

### **1. Facilities – High School Parking Lot Phase 3:**

The third phase of paving at Amity High School was bid in May. Five contractors bid on the project and the pricing ranged from \$1.91 per sq ft to \$2.75 per sq foot for paving; pricing for line striping ranged from \$4,500 to \$6,100; and pricing for curbing ranged from \$5.85 per sq ft to \$8.50. Total project costs ranged from \$192,974 to \$279,335. H & L Paving, LLC from Norwalk is the overall low bidder. The District has worked with the project manager on previous projects and references were checked.

The remaining budget for paving is \$329,485. The Administration would like the option to work with the low bidder to repair any damaged done to the rear parking lot at Amity High School once the tent is removed. The tent company will patch the area but our intent is to have it in the new condition it was at the start of school this year. We will assess the condition of the parking lot and if further work is needed contact H & L Paving to expand the project to include the rear parking lot. This remains in the scope of the original bond project.

I recommend the Amity Finance Committee and the Amity Board of Education award the contract to H & L Paving, LLC.

#### **Amity Finance Committee:**

*Move to recommend the Amity Board of Education...*

#### **Amity Board of Education:**

*Move to ...*

*award phase 3 of the paving project at Amity High School to H & L Paving, LLC of Norwalk, CT at a price of \$192,974 with the option of repairing the rear parking lot if needed.*

**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>APR 2021</b>	<b>CHANGE</b>	<b>APR 2021</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	153,486	1,820	155,306	(93,011)	UNF
3	OTHER STATE GRANTS	758,946	731,653	1,084,849	(3,496)	1,081,353	349,700	FAV
4	MISCELLANEOUS INCOME	70,134	43,750	23,160	0	23,160	(20,590)	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>51,022,284</b>	<b>(1,676)</b>	<b>51,020,608</b>	<b>236,099</b>	<b>FAV</b>
7	SALARIES	25,967,645	27,168,752	26,849,015	(165,458)	26,683,557	(485,195)	FAV
8	BENEFITS	5,141,056	6,186,149	5,763,852	(330,338)	5,433,514	(752,635)	FAV
9	PURCHASED SERVICES	7,565,040	9,450,642	9,120,487	(141,212)	8,979,275	(471,367)	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	2,809,380	(82,804)	2,726,576	(181,398)	FAV
12	EQUIPMENT	771,215	134,053	286,156	24,091	310,247	176,194	UNF
13	IMPROVEMENTS / CONTINGENCY	222,666	305,940	132,999	42,150	175,149	(130,791)	FAV
14	DUES AND FEES	110,508	177,164	144,389	(43,865)	100,524	(76,640)	FAV
15	TRANSFER ACCOUNT	495,482	0	507,844	0	507,844	507,844	UNF
16	<b>TOTAL EXPENDITURES</b>	<b>47,768,411</b>	<b>50,784,509</b>	<b>50,067,957</b>	<b>(697,436)</b>	<b>49,370,521</b>	<b>(1,413,988)</b>	<b>FAV</b>
17	<b>SUBTOTAL</b>	<b>1,950,777</b>	<b>0</b>	<b>954,327</b>	<b>695,760</b>	<b>1,650,087</b>	<b>1,650,087</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>954,327</b>	<b>695,760</b>	<b>1,650,087</b>	<b>1,650,087</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>APR 2021</b>	<b>CHANGE</b>	<b>APR 2021</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	WOODBIDGE 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	1,244	4,286	1,244	FAV
6	PARKING INCOME	20,865	32,000	24,476	576	25,052	(6,948)	UNF
7	INVESTMENT INCOME	52,292	35,000	3,500	0	3,500	(31,500)	UNF
8	ATHLETICS	25,300	22,000	0	0	0	(22,000)	UNF
9	TUITION REVENUE	133,936	129,675	102,968	0	102,968	(26,707)	UNF
10	TRANSPORTATION INCOME	26,000	26,600	19,500	0	19,500	(7,100)	UNF
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>153,486</b>	<b>1,820</b>	<b>155,306</b>	<b>(93,011)</b>	<b>UNF</b>
13	OTHER STATE GRANT	0	0	0	0	0	0	FAV
14	SPECIAL EDUCATION GRANTS	758,946	731,653	1,084,849	(3,496)	1,081,353	349,700	FAV
15	<b>OTHER STATE GRANTS</b>	<b>758,946</b>	<b>731,653</b>	<b>1,084,849</b>	<b>(3,496)</b>	<b>1,081,353</b>	<b>349,700</b>	<b>FAV</b>
16	RENTAL INCOME	18,177	14,000	25	0	25	(13,975)	UNF
17	INTERGOVERNMENTAL REVENUE	32,884	4,750	4,750	0	4,750	0	FAV
18	OTHER REVENUE	19,073	25,000	18,385	0	18,385	(6,615)	UNF
19	TRANSFER IN	0	0	0	0	0	0	FAV
20	<b>MISCELLANEOUS INCOME</b>	<b>70,134</b>	<b>43,750</b>	<b>23,160</b>	<b>0</b>	<b>23,160</b>	<b>(20,590)</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>51,022,284</b>	<b>(1,676)</b>	<b>51,020,608</b>	<b>236,099</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>APR 2021</b>	<b>CHANGE</b>	<b>APR 2021</b>	<b>VARIANCE</b>	<b>FAV</b>
<b>LINE</b>	<b>CATEGORY</b>	<b>ACTUAL</b>	<b>BUDGET</b>	<b>FORECAST</b>	<b>INCR./(DECR.)</b>	<b>FORECAST</b>	<b>OVER/(UNDER)</b>	<b>UNF</b>
1	5111-CERTIFIED SALARIES	21,243,071	22,123,005	21,856,818	(88,738)	21,768,080	(354,925)	FAV
2	5112-CLASSIFIED SALARIES	4,724,574	5,045,747	4,992,197	(76,720)	4,915,477	(130,270)	FAV
3	<b>SALARIES</b>	<b>25,967,645</b>	<b>27,168,752</b>	<b>26,849,015</b>	<b>(165,458)</b>	<b>26,683,557</b>	<b>(485,195)</b>	<b>FAV</b>
4	5200-MEDICARE - ER	354,550	393,384	373,379	0	373,379	(20,005)	FAV
5	5210-FICA - ER	293,447	315,690	279,613	0	279,613	(36,077)	FAV
6	5220-WORKERS' COMPENSATION	203,071	237,774	215,228	20,000	235,228	(2,546)	FAV
7	5255-MEDICAL & DENTAL INSURANCE	3,134,277	4,229,925	3,873,624	(350,000)	3,523,624	(706,301)	FAV
8	5860-OPEB TRUST	40,950	31,678	31,678	0	31,678	0	FAV
9	5260-LIFE INSURANCE	42,820	47,280	50,399	0	50,399	3,119	UNF
10	5275-DISABILITY INSURANCE	10,277	10,529	11,479	273	11,752	1,223	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	124,787	0	124,787	4,563	UNF
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	11,431	0	11,431	4,000	UNF
16	5291-CLOTHING ALLOWANCE	1,438	2,000	2,000	(611)	1,389	(611)	FAV
17	<b>BENEFITS</b>	<b>5,141,056</b>	<b>6,186,149</b>	<b>5,763,852</b>	<b>(330,338)</b>	<b>5,433,514</b>	<b>(752,635)</b>	<b>FAV</b>
18	5322-INSTRUCTIONAL PROG IMPROVEMENT	21,594	22,200	18,870	24,103	42,973	20,773	UNF
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	1,985,755	(67,816)	1,917,939	158,580	UNF
21	5440-RENTALS - LAND, BLDG, EQUIPMENT	48,229	113,634	97,858	43,083	140,941	27,307	UNF
22	5510-PUPIL TRANSPORTATION	2,861,329	3,544,897	3,092,361	(70,558)	3,021,803	(523,094)	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	95,324	(11,244)	84,080	(30,276)	FAV
25	5560-TUITION EXPENSE	2,640,986	3,446,498	3,239,338	(15,220)	3,224,118	(222,380)	FAV
26	5590-OTHER PURCHASED SERVICES	181,818	99,307	238,348	(43,560)	194,788	95,481	UNF
27	<b>PURCHASED SERVICES</b>	<b>7,565,040</b>	<b>9,450,642</b>	<b>9,120,487</b>	<b>(141,212)</b>	<b>8,979,275</b>	<b>(471,367)</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>APR 2021</b>	<b>CHANGE</b>	<b>APR 2021</b>	<b>VARIANCE</b>	<b>FAV</b>
<b>LINE</b>	<b>CATEGORY</b>	<b>ACTUAL</b>	<b>BUDGET</b>	<b>FORECAST</b>	<b>INCR./((DECR.)</b>	<b>FORECAST</b>	<b>OVER/(UNDER)</b>	<b>UNF</b>
28	5830-INTEREST	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	599,490	11,000	610,490	(99,376)	FAV
32	5420-REPAIRS, MAINTENANCE & CLEANING	774,787	761,354	841,099	(38,962)	802,137	40,783	UNF
33	5611-INSTRUCTIONAL SUPPLIES	311,910	366,196	298,605	5,762	304,367	(61,829)	FAV
34	5613-MAINTENANCE/CUSTODIAL SUPPLIES	228,327	229,557	251,775	(37,150)	214,625	(14,932)	FAV
35	5620-OIL USED FOR HEATING	42,700	42,700	58,000	(7,245)	50,755	8,055	UNF
36	5621-NATURAL GAS	47,475	67,173	46,173	(7,500)	38,673	(28,500)	FAV
37	5627-TRANSPORTATION SUPPLIES	96,789	124,202	124,202	(3,020)	121,182	(3,020)	FAV
38	5641-TEXTS & DIGITAL RESOURCES	291,630	63,778	84,473	(8,969)	75,504	11,726	UNF
39	5642-LIBRARY BOOKS & PERIODICALS	18,584	20,215	15,933	3,280	19,213	(1,002)	FAV
40	5690-OTHER SUPPLIES	502,949	522,933	489,630	0	489,630	(33,303)	FAV
41	<b>SUPPLIES (INCLUDING UTILITIES)</b>	<b>2,935,589</b>	<b>2,907,974</b>	<b>2,809,380</b>	<b>(82,804)</b>	<b>2,726,576</b>	<b>(181,398)</b>	<b>FAV</b>
42	5730-EQUIPMENT - NEW	332,148	70,947	167,510	9,756	177,266	106,319	UNF
43	5731-EQUIPMENT - REPLACEMENT	439,067	63,106	118,646	14,335	132,981	69,875	UNF
44	<b>EQUIPMENT</b>	<b>771,215</b>	<b>134,053</b>	<b>286,156</b>	<b>24,091</b>	<b>310,247</b>	<b>176,194</b>	<b>UNF</b>
45	5715-IMPROVEMENTS TO BUILDING	160,841	55,940	79,495	37,150	116,645	60,705	UNF
45a	5715-FACILITIES CONTINGENCY	100,000	100,000	100,000	0	100,000	0	FAV
45b	TRSF. FROM FACILITIES CONTINGENCY	(100,000)	0	(100,000)	0	(100,000)	(100,000)	FAV
46	5720-IMPROVEMENTS TO SITES	61,825	0	0	5,000	5,000	5,000	UNF
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	(96,496)	0	(96,496)	(96,496)	FAV
48	<b>IMPROVEMENTS / CONTINGENCY</b>	<b>222,666</b>	<b>305,940</b>	<b>132,999</b>	<b>42,150</b>	<b>175,149</b>	<b>(130,791)</b>	<b>FAV</b>
49	5580-STAFF TRAVEL	10,723	24,850	18,637	(14,000)	4,637	(20,213)	FAV
50	5581-TRAVEL - CONFERENCES	22,406	46,660	35,098	(23,865)	11,233	(35,427)	FAV
51	5810-DUES & FEES	77,379	105,654	90,654	(6,000)	84,654	(21,000)	FAV
52	<b>DUES AND FEES</b>	<b>110,508</b>	<b>177,164</b>	<b>144,389</b>	<b>(43,865)</b>	<b>100,524</b>	<b>(76,640)</b>	<b>FAV</b>
53	<b>5856-TRANSFER ACCOUNT</b>	495,482	0	507,844	0	507,844	507,844	UNF
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>50,067,957</b>	<b>(697,436)</b>	<b>49,370,521</b>	<b>(1,413,988)</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 2020-2021**



MAY 2021

**2020-2021 FORECAST**

**OVERVIEW**

*The projected unspent fund balance for this fiscal year is \$1,650,087 FAV previously, \$732,666 FAV, which appears on page 1, column 6, and line 20. The forecast now includes the use of the fund balance available to support all of the end-of-year purchases for items removed from the fiscal year 2021-2022 budget request and transferring funds into the capital nonrecurring reserve 1% (current statute limit), or \$507,844. The end-of-year purchases identified total \$185,600 include digital whiteboards, computers, 3D printers, cooling tower repairs, concrete repairs, pipe insulations, science textbooks and other items deemed necessary either to age and condition for replacement or additional safety measures.*

**REVENUES BY CATEGORY**

The projected yearend balance of revenues is *\$236,099 FAV previously \$237,775 UNF*, which appears on page 2, column 6, line 22.

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

The forecast is based on historical State payments.

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

*The forecast estimates 78% of parking revenue will be collected, \$6,948 UNF, previously \$7,524 UNF.*

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

The budget is based on the expectation that interest rates will remain steady and revenue will be as budgeted. *The forecast projects less interest income due to declining interest rates, \$31,500 UNF previously \$31,500 UNF.*

<b><u>Month</u></b>	<b><u>Peoples United</u></b>	<b><u>State Treasurer's Investment Fund</u></b>
July 2020	.392%	.352%
August	.392%	.221%
September	.399%	.081%
October	.399%	.081%
November	.397%	.065%
December	.397%	.065%
January	.398%	.074%
February	.398%	.150%

March	.398%	.129%
April	.398%	.120%
May	.398%	.122%

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

*The forecast estimates a 100% reduction due to limited fan participation for all seasons, \$22,000 UNF previously, \$22,000 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, three students are moving into the District. The projected variance is \$26,707 UNF previously \$26,707 UNF.*

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

The forecast is based on projected State payments and enrollment for magnet school transportation budgeted, *estimated at \$19,500 which is \$7,100 UNF, previously \$7,100 UNF.*

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

The current projection is based on budgeted costs for placements and transportation. *The budget assumed a 73% reimbursement rate, actual reimbursement rate is 84.4%. This is the highest reimbursement rates in years.* Excess cost grant is expected to increase due to an increase of services. Tuition is increased for students moving into the District with unanticipated costs, which will be partially reimbursed through the grant, *\$349,700 FAV previously, \$353,196 FAV. Changes to student placement since the most recent SEDAC-G filing of expenses favorably affects the tuition line now but not the current reimbursement revenue. Due to reporting cycles timelines, the reduction in review will affect the budget for next year, fiscal year 2021-22. This unfortunately creates a surplus in the current revenue budget and a deficit in revenue for fiscal year 2021-22 (assuming no new outplacements occur).*

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

The forecast estimates a 100% reduction based on limiting the use of the building for the year due to COVID19, *\$13,975 UNF previously, \$13,975 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; *slightly less revenue is anticipated at this time, \$6,615 UNF previously, \$6,615 FAV.*

## EXPENDITURES BY CATEGORY

The projected yearend balance of expenditures is *\$1,413,988 FAV previously \$495,054 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. All substitute position have not yet been filled. The District has not yet reached the budgeted amount of turnover savings, \$81,769 UNF. The current projection is \$34,328 UNF previously \$94,442 UNF. The forecast includes \$48,053 FAV grant funds pending State approval and \$61,818 FAV for vacancy filled by an outside consultant. Substitute fill rates are trending 54% higher and costs, which reflect the rate increase, are trending 82% higher than last year at this time. The forecast projection for substitute costs is reduced from \$195,168 higher UNF to \$150,168 UNF based on current data and remote sessions. *The current projection is \$354,925 FAV, previously \$266,187 FAV. The forecast reflects turnover savings year-to-date of \$124,956 unfilled coaching and activity positions for the year due to COVID restrictions, \$38,660 FAV, less coverage costs with remote work \$19,755 FAV, less in homebound tutoring costs of \$33,000, \$36,534 FAV for unpaid LOAs, \$83,010 FAV in substitute costs, and \$12,456 FAV less for degree changes.*

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

The forecast is based on budget. There are still open positions and the forecast will be updated after the school year begins. *The need for additional support staff is anticipated as we increase building hours and occupancy.* The turnover factor is currently short of the budget projection by \$752 UNF previously, \$16,185 UNF. There are still positions in transition and the turnover factor and classified budget is expected to be neutral. One position was no longer eligible for grant funds though a certified salary replaced the request, \$31,520 UNF. *The forecast reflect changes due to FAV, staff vacancies \$26,900 FAV, including delay of student help desk rollout, of \$34,790 FAV, contract settlements and overtime estimates for the year reduced by \$47,800 due to no in-person events after school, reduced substitutes costs \$20,000 FAV, net \$130,270 FAV, previously \$53,550 FAV.*

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

The forecast is based on the actual expenditures for current staff, *\$56,082 FAV* due to lower payroll expenses outlined under certified and classified salaries.

### 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 saved \$15,313 FAV. We are waiting for a quote for renewal of our cyberinsurance policy this month. It is expected to increase considerably. *Total savings YTD \$2,546 FAV, previously, \$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. Currently the account is running at 76.9% of claims, previously 80.6% of claims. The forecast projects the account at 77% of the current claims balance, \$826,877 of \$1,073,923 will not be spent. Claim payments lag about 90 days.*

#### CLAIMS OF CURRENT EMPLOYEES AND RETIREES

MONTH	2020-2021 ACTUAL	2020-2021 BUDGET	VARIANCE	2019-2020 ACTUAL	2018-2019 ACTUAL
<i>JUL</i>	\$ 256,509	\$ 408,015	\$ (151,506)	\$ 366,182	\$ 292,718
<i>AUG</i>	\$ 200,490	\$ 446,937	\$ (246,447)	\$ 383,765	\$ 282,192
<i>SEP</i>	\$ 292,575	\$ 365,001	\$ (72,426)	\$ 317,685	\$ 376,576
<i>OCT</i>	\$ 293,360	\$ 363,318	\$ (69,958)	\$ 383,369	\$ 245,938
<i>NOV*</i>	\$ 409,279	\$ 453,630	\$ (44,351)	\$ 370,672	\$ 418,110
<i>DEC*</i>	\$ 489,999	\$ 484,052	\$ 5,947	\$ 403,126	\$ 334,678
<i>JAN</i>	\$ 253,077	\$ 354,535	\$ (101,458)	\$ 348,820	\$ 331,129
<i>FEB</i>	\$ 259,775	\$ 307,567	\$ (47,792)	\$ 124,317	\$ 384,149
<i>MAR</i>	\$ 255,965	\$ 389,184	\$ (133,219)	\$ 276,832	\$ 363,660
<i>APR</i>	\$ 304,485	\$ 343,398	\$ (38,913)	\$ 196,735	\$ 278,082
<i>MAY</i>	\$ 235,252	\$ 409,054	\$ (173,802)	\$ 124,900	\$ 363,382
<i>JUN</i>	\$ 326,536	\$ 326,536	\$ -	\$ 194,428	\$ 224,419
<b>TOTALS</b>	<b>\$ 3,577,302</b>	<b>\$ 4,651,225</b>	<b>\$ (1,073,923)</b>	<b>\$ 3,490,831</b>	<b>\$ 3,895,033</b>

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

2016-2017 ACTUAL	2017-2018 ACTUAL	2018-2019 ACTUAL	2019-2020 FORECAST	2020-2021 FORECAST
85.2%	72.1%	92.2%	84.1%	<b>76.9%</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. November & December Claims and Fees adjusted to record rebate credit postings.**

**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>	\$ 53,804	\$ 58,089	\$ (4,285)	\$ 46,306	\$ 63,599
<i>OCT</i>	\$ 55,100	\$ 61,041	\$ (5,941)	\$ 70,245	\$ 63,213
<i>NOV*</i>	\$ 56,242	\$ 41,539	\$ 14,703	\$ 59,406	\$ 71,815
<i>DEC*</i>	\$ 55,608	\$ 37,299	\$ 18,309	\$ 62,365	\$ 70,016
<i>JAN</i>	\$ 11,403	\$ 36,807	\$ (25,404)	\$ 73,157	\$ 78,786
<i>FEB</i>	\$ 94,489	\$ 36,239	\$ 58,250	\$ 57,592	\$ 66,033
<i>MAR</i>	\$ 80,240	\$ 32,198	\$ 48,042	\$ 58,624	\$ 38,918
<i>APR</i>	\$ 54,687	\$ 36,879	\$ 17,808	\$ 57,573	\$ 69,321
<i>MAY</i>	\$ 59,398	\$ 36,343	\$ 23,055	\$ 56,459	\$ 76,505
<i>JUN</i>	\$ 35,743	\$ 35,743	\$ -	\$ 56,502	\$ 72,044
<b>TOTALS</b>	<b>\$ 660,463</b>	<b>\$ 539,887</b>	<b>\$ 120,576</b>	<b>\$ 726,582</b>	<b>\$ 794,113</b>

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

*The forecast is based on the actual staff, \$3,119 UNF, previously \$3,119 FAV.*

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

*The forecast is based on the current staff, \$1,223 UNF, previously, \$950 UNF.*

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

*The current forecast projects this account will be \$4,563 UNF previously neutral.*

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

The forecast estimates the account may run \$4,000 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. *\$4,700 UNF previously, \$4,000 UNF.*

**LINE 20 on Page 3: 5330-PROFESSIONAL TECHNICAL SERVICES:**

Coverage is needed for an administrator on leave. Coverage is provided through an outside consultant, \$61,818 UNF. A transfer for these professional services was approved in October. Legal services are higher than budgeted due to COVID-19 environment. Legal expenses are running 25% higher than the first quarter last year. Many vendor contracts are reviewed to consider cancellations because of COVID-19; two bargaining units were scheduled to negotiate in the spring of 2020 but were delayed until this fiscal year, and numerous labor and employment questions relating to COVID-19. The change in special education laws increased the use of legal services. *Legal costs continue to be higher, approximately \$82,000 UNF over budget and a transfer was approved for a 1:1 device lease in May, total for these line items is forecasted at \$158,580 UNF previously \$226,396*

*UNF. Some accounts for athletics and special education services were not exhausted reducing the overall deficit in this object code.*

**LINE 21on Page 3: 5440-RENTALS:**

*The forecast estimate is these accounts will be \$27,307 UNF, previously \$15,776 under budget due to increased rentals for end of year ceremonies and offset by fewer athletic rentals mainly for sports restricted during COVID-19. This includes pool rentals, van rentals, and off-site turf field rentals for practices.*

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

*Special Education Transportation is projecting a \$407,960 FAV, previously, \$326,437 FAV balance partly due to the first summer session being held virtually. Late busses and field trips will be reduced due to COVID-19, currently assuming a 40% or \$125,919 FAV, previously \$183,969 FAV projection for a total projection of \$523,094 FAV, previously, \$452,536 FAV*

**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 cyber-insurance 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 approved for the current fiscal year. The District will receive discounted invoices for the CEN service provided by the State of Connecticut. The District will save \$19,032 FAV. Postage costs were less this year, \$11,000 FAV, net for the account \$30,276 FAV.*

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

*Tuition is currently forecasted to have a \$222,380 FAV previously \$207,160 FAV variance. The forecast is based on current students and their placements.*

*Tuition for the vo-ag schools has a projected variance of \$51,503 FAV previously \$53,197 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	5(5)
Trumbull	3	6	4	4	5	3(3)
Nonnewaug	3	4	6	5	7	7(7)
Common Ground Charter HS	1	0	0	0	1	1(1)
Betsy Ross Magnet	0	0	0	0	0	1(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>17(17)</b>

ECA is projected variance *to be \$25,928 FAV previously \$25,928 FAV, below budget, with five less students enrolled than budgeted.*

	FY16-17 ACTUAL	FY17-18 ACTUAL	FY18-19 ACTUAL	FY19-20 ACTUAL	FY20-21 BUDGET	FY20-21 FORECAST
ECA	15	19	24	21	21	16(16)

*Public (ACES) and private out-of-district placements are currently less than anticipated, \$144,949 FAV previously \$128,035 FAV. There are more outplaced students who recently returned back to District in-house programs or moved out of the District.*

	FY16-17 ACTUAL	FY17-18 ACTUAL	FY18-19 ACTUAL	FY19-20 ACTUAL	FY20-21 BUDGET	FY20-21 FORECAST
Public SPED	8	8	11	8	9	6(6)
Private SPED	27	20	22	18	29	27(27)
Totals	35	28	33	26	38	33(33)

**LINE 26 on Page 3: 5590-OTHER PURCHASED SERVICES:**

The forecast assumes a transfer into the cafeteria fund to cover operations due to losses in the program. The year-to-date projection for the café fund is \$153,395 UNF. The volume of meals is significantly impacted by no in-person dining option and near zero ala carte sales. Typical November ala carte sales are \$28,923 and this year ala carte revenue for November was \$175. Also 13,681 meals were served in November of 2019 and just 3,734 meals were served in November 2020. We meet regularly to discuss options to increase participation. We plan to expand the Friday offering of 2 meals to 4 to cover Saturday. This will benefit the families participating and generate a larger State reimbursement. Previous estimates ranged from \$100,000 to \$150,000 that the Board needed to transfer from the general fund. A budget request of \$75,000 was approved in February. *The loss through May is \$112,543 and the loss projected through June is \$122,783 in food services. The District was able to secure \$21,928 in ESSER II grant funding towards this deficit. The transfer request this month is \$31,440 to return the fund balance to \$100,000. The Board had approved funds in 2020 to cover the rising costs of food services, equipment repairs and replacements. If approved, the total transfer from the general fund will be \$106,440 this year.*

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

Debt service is \$54,962 over budget 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. Current kilowatt hours are down, 2,638,461 even with the increased full capacity run times for HVAC systems during the pandemic. *The usage is now projected to be under budget, \$56,000 FAV previously \$67,500 FAV. Eleven months of invoices have been received and are lower than expected. The lower usage is due to limited evening activities and several weeks of remote learning.*

**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>JUL</i>	<i>254,686</i>	261,716	<i>(7,030)</i>	306,744	104,580
<i>AUG</i>	<i>299,439</i>	292,794	<i>6,645</i>	298,187	152,275
<i>SEP</i>	<i>285,993</i>	308,389	<i>(22,396)</i>	255,198	314,178
<i>OCT</i>	<i>248,089</i>	282,314	<i>(34,225)</i>	294,827	271,919
<i>NOV</i>	<i>238,583</i>	260,774	<i>(22,191)</i>	243,754	249,759
<i>DEC</i>	<i>240,912</i>	260,198	<i>(19,286)</i>	250,944	247,237
<i>JAN</i>	<i>249,595</i>	268,460	<i>(18,865)</i>	266,227	274,992
<i>FEB</i>	<i>243,774</i>	269,090	<i>(25,316)</i>	251,802	263,959
<i>MAR</i>	<i>246,886</i>	256,461	<i>(9,575)</i>	217,683	248,762
<i>APR</i>	<i>254,711</i>	260,337	<i>(5,626)</i>	232,983	262,037
<i>MAY</i>	<i>224,685</i>	246,095	<i>(21,410)</i>	145,568	276,658
JUN	223,240	223,240	-	239,032	91,898
<b>Totals</b>	<b>3,010,593</b>	<b>3,189,868</b>	<b>(179,275)</b>	<b>3,002,949</b>	<b>2,758,254</b>

**Note: 2019-2020 Actual Kilowatt Hours during COVID shutdown 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. The delivery charge has increased significantly since last year. Currently we anticipate this may be partially offset by shorter operating days even with extended run time for air handlers. However, the delivery charges may put the accounts over even if kilowatt usage is down.

The budget for propane is \$3,330. *The forecast is project to be \$2,000 FAV.*

The budget for water is \$47,800. *The forecast is projects a savings of \$35,000 FAV previously \$15,000 FAV.* Nine months of usage has been invoiced and costs are lower than expected. The lower usage is due to limited evening activities and several weeks of remote learning. The assumption considers the scheduled increase usage and increased occupants.

Sewer costs are budgeted at \$31,000; costs are projected to be \$24,623. *The forecast is \$6,376 FAV previously \$6,647 FAV.*

DEGREE DAYS

There are 3,952 degree days to date compared to 3,943 last year at this time.

**LINE 32 on Page 4: 5420-REPAIRS & MAINTENANCE:** There is an emergency repair to a leaking underground water line to the boiler at the high school quoted at \$53,420. A transfer was requested in December. *A transfer was approved in February for snow removal. Snow removal for March was \$3,300 bringing the total to \$93,825 year-to-date or \$26,325 UNF over budget. Some repair accounts are not fully expended offsetting the water line and snow removal for a net \$40,783 UNF.*

**LINE 33 on Page 4: 5611-INSTRUCTIONAL SUPPLIES:** *Instructional supply accounts are estimated to be underspent by \$61,829 FAV. This is largely due to less copy paper, lab supplies, and other instructional supplies limited due to the remote and hybrid schedules this year.*

**LINE 35 & 36 on Page 4: 5620 & 5621-OIL & NATURAL GAS:** *These accounts were difficult to estimate as we increased the percentage of outdoor airflow into the HVAC system per CDC recommendations. The actual temperatures for the winter months were not below average. These accounts are now projected to be \$20,400 FAV, previous \$5,700 FAV. A budget transfer was approved in May to top off the oil tank at Bethany Middle School using funds left on the high school natural gas line. There has not been a significant stretch of low temperatures and with the reduced occupancy in the evenings and remote learning days, the forecast slightly favorable.*

**LINE 40 on Page 4: 5690-OTHER SUPPLIES:** The forecast reflects reimbursement from the Coronavirus Relief Fund grant and a budget transfer approved earlier this year for \$17,500 UNF for virus protection, \$33,303 FAV previously \$50,803 FAV as grants reimbursements were charged to appropriate accounts.

**LINE 42 on Page 4: 5730-EQUIPMENT - NEW:** *The forecast reflects purchasing devices for support staff to work remotely. Many of the staff have managed to utilize chrome books from computer labs. These devices are not robust enough for many of the operational programs to run. The bid price is 33 devices at \$832 per device, totaling \$27,456 UNF, previously estimated at \$33,300 UNF. \$63,263 UNF was previously approved and transferred for COVID-19 related equipment needs. These account will be \$106,319 UNF if this request is approved.*

**LINE 43 on Page 4: 5731-EQUIPMENT REPLACEMENT:** *The forecast reflects the estimated costs of \$20,000 UNF for student devices that will be unreturnable at the end of the first 3-year lease cycle. The administration is working with the lease company to determine the fair market value of replacement items. The damaged devices will be retained in-house and utilized for parts in repairing other devices. The devices for the administrative staff are near the end of their useful life. The forecast estimates 11 devices at \$1,617 per device, totaling \$17,787 UNF. This account will be \$69,875 UNF if transfer are approved.*

**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. There is an emergency repair to a leaking underground water line to the boiler at the high school quoted at \$53,420. A transfer was requested in December. A transfer was approved in March for snow removal for \$23,025 UNF. *The balance in the facility contingency is*

*zero after the transfer requested was approved in April for the cooling tower piping of \$23,555.*

**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. A transfer was approved in November for \$17,500 for critical security license to cover the additional devices purchase this fiscal year. A budget transfer was approved in February for food services for \$75,000 to cover losses in the food service program. A transfer was approved in April for science textbooks for \$3,996. *Transfers are requested this month for the cafeteria fund \$31,440, laptops \$14,990, and \$7,374 for key card access points. The balance is contingency will be zero if these transfers are approved.*

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

Actual expenditures are less due to less travel between schools and to conferences. *The forecast is projected to \$55,640 FAV previously \$17,775 FAV.*

**LINES 52 on page 4: 5810 DUES AND FEES:**

*The forecast estimates \$21,000 FAV previously, \$15,000 FAV in unspent dues and fees. Many entrance fees were reduced or waived during virtual programs. There were less athletic tournaments fees to pay.*

**COVID-19 EXPENDITURES:** *Currently expenditures related to preparing for reopening in the COVID-19 environment are estimated at \$1,998,674 total, \$1,682,031 from current fiscal year. The two largest purchases are in the area of PPE of approximately \$180,019, \$37,185 on cleaning supplies, \$176,863 for social distancing measures, \$51,583 for rentals and end of year celebrations, \$24,667 on equipment and \$257,314 for technology. Staffing costs of \$954,400 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 were funded with the funds held as a 15% encumbrance, in the amount of \$968,619 in regular accounts. Budget transfers were approved liquidating \$556,346 of the encumbrances to cover costs. There is another budget transfer requested this month for \$49,126. The remaining left in the 15% encumbrance reserve has been released back the special education accounts in which it is being held. \$183,345 was released back to the original accounts in technology and facilities to cover expenses. The District was approved for \$55,040 in ESSER funds. These grant funds were utilized for summer programs and curriculum writing are included in the COVID-19 estimates. A second grant, Coronavirus Relief Funds (CRF) awarded the District \$240,120. All awarded grant funds are exhausted. The District applied for another round of funding at the end of February. ***This is identified as the ESSER II funding allotment of \$244,022 for the District. Districts are strongly encouraged to identified new costs in response to the COVID-19 environment. Areas of social emotional learning, devices, professional development for remote learning are some of the needs identified by the State Department. To date, \$48,678 has been applied to this year's costs and the remaining funds will be for expenditures through September 2023. This funding was approved on Friday, April 9, 2021. ARP-ESSER grant application is being prepared.****

**LINE 53 on page 4: 5856 TRANSFER ACCOUNT:** *The forecast projects 1%, \$507,844 of the operating budget will be available for transfer into the Capital Nonrecurring Account. The State Legislature may increase the amount to 2% of the operating budget. The item will be presented after the final balance for the FY21 is confirmed at the August 2021 meeting.*

## APPENDIX A

### COST SAVINGS AND EFFICIENCIES FOR FISCAL YEAR 2020-2021

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**TOTAL ANNUAL SAVINGS TO-DATE OF: \$128,708**

**\$19,268 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.

**\$49,245 Pegpetia Grant:** Jeremy Iverson also applied for and received a grant from PEGPETIA. Current advancements in video technology have overstepped the abilities of the current computer systems in use. In order to maintain effective practice in post-production, the editing systems must see an enhancement. Utilizing a new computer system with a better integrated graphics solution, greater allocations of available RAM, and a faster multi-core processor, will not only maximize productivity, but will satisfy the needs of the program in the immediate future. This will effectively allow students to work at a more rigorous level. Time management and project completion will also be impacted, affording students more time in developing advanced skills during the production process. This reduces the amounts that would be funded through the general fund

**\$19,032 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.

**\$28,339 Polycarbonate and Sheet Dividers for Social Distancing:** The District's building maintainer has constructed approximately 113 protective barriers since March of 2020 for the classrooms and offices. The District orders polycarbonate and Randy Joiner skillfully measures, cuts and stabilizes the units for a custom fit. This includes science labs, offices and classrooms. Randy has also installed 41 curtain dividers in the District when more appropriate than a solid structure. The savings is estimated considering the cost of the polycarbonate and the estimate purchase of fully constructed dividers.

**\$5,000 Math Textbooks:** Dameon Kellogg, the Math Department chairperson consistently searches for used textbooks to replace lost books or fill enrollment needs.

**\$7,524 Reduced Trash Pickups:** The Director of Facilities, Steve Martoni, negotiated a revised schedule for trash pickups at all three buildings, saving \$1,254 per month. Less trash is generated without full cafeteria service and the hybrid/shortened day schedule of students.

**\$300 DMV fees:** The Facilitites staff reviewed motor vehicles fees for registering our vehicles and obtained a waiver as a municipal agency.

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 2019-2020 - \$43,497 <https://www.amityregion5.org/boe/sub-committees/finance-committee>
- 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).

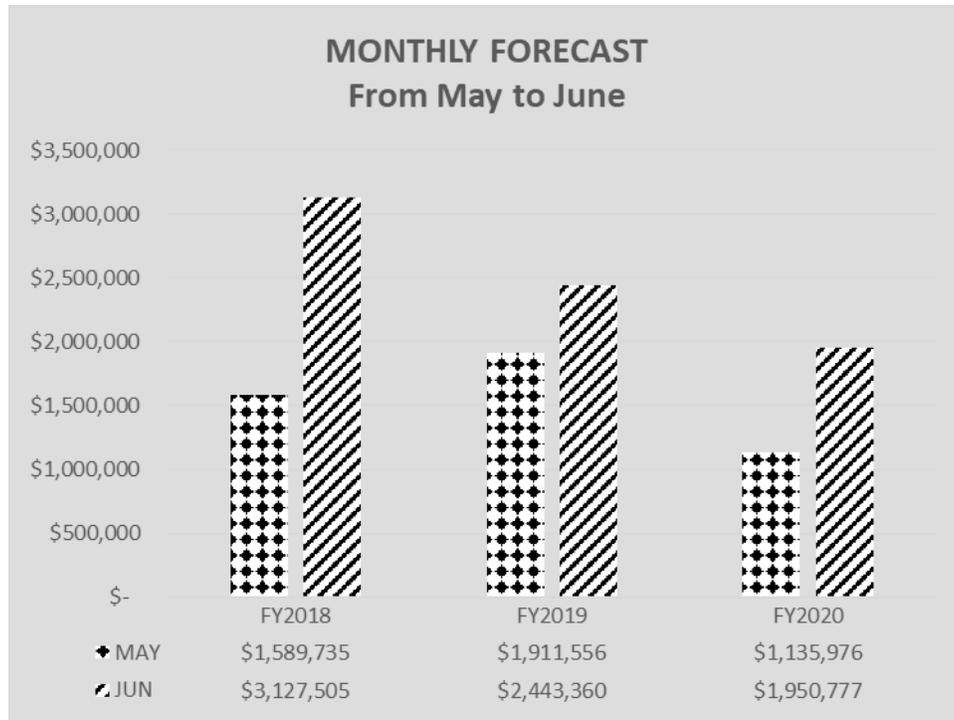
Revenues can be most impacted by decisions made at the State level for Special Education and Transportation grants. We have seen the reimbursement rate change in mid-year.

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 audited fund balance is \$1,950,777 after \$515,077 in EOY purchases and allocation of 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,

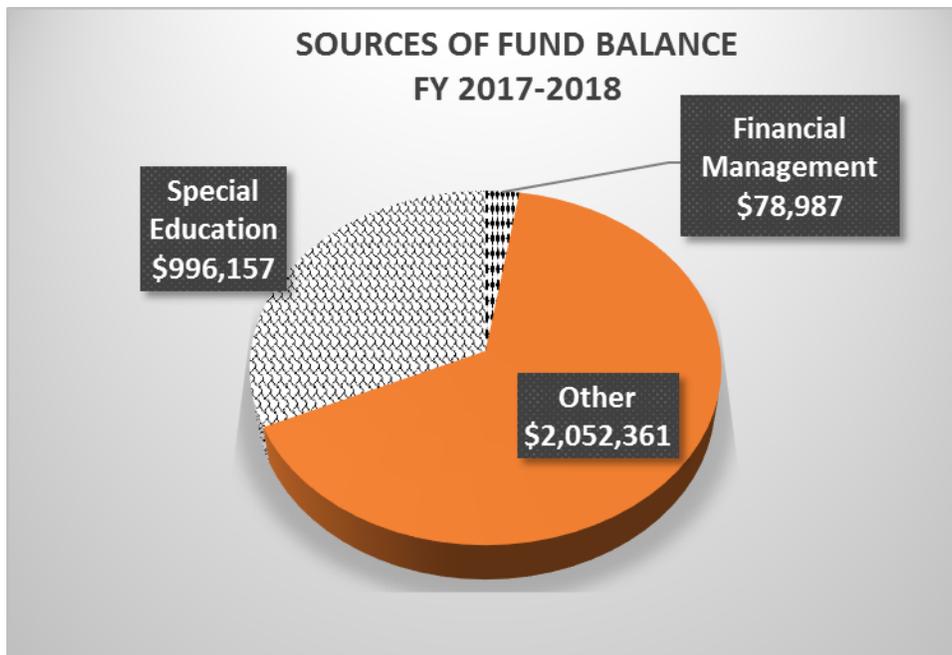
summer work costs, substitute costs, degree changes and homebound services were less than anticipated.

**\$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.

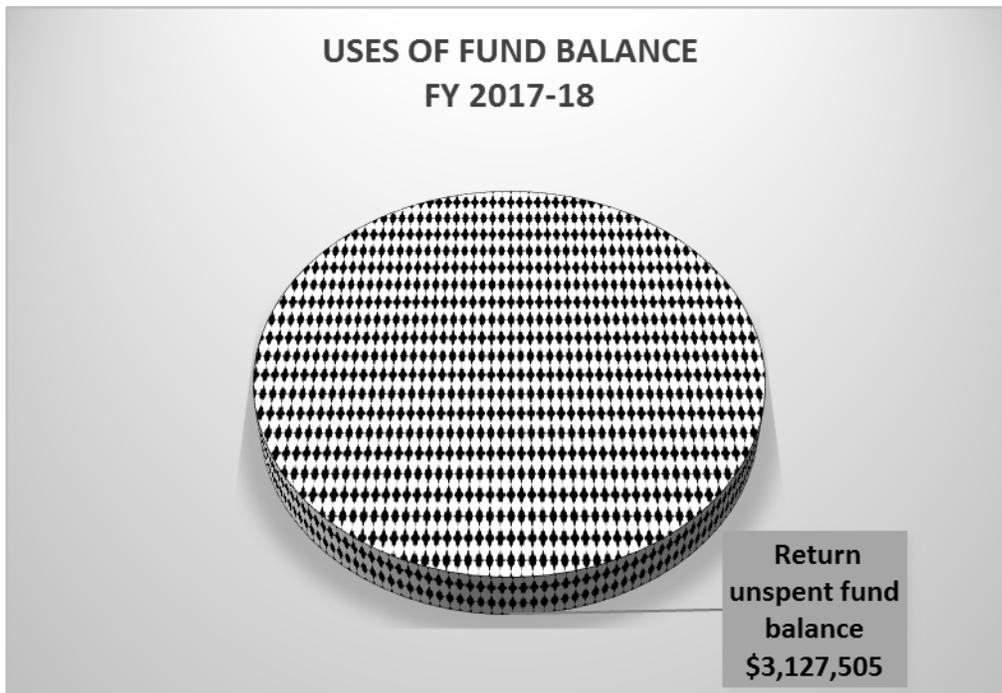
The primary sources of the fund balance are shown graphically below:



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.

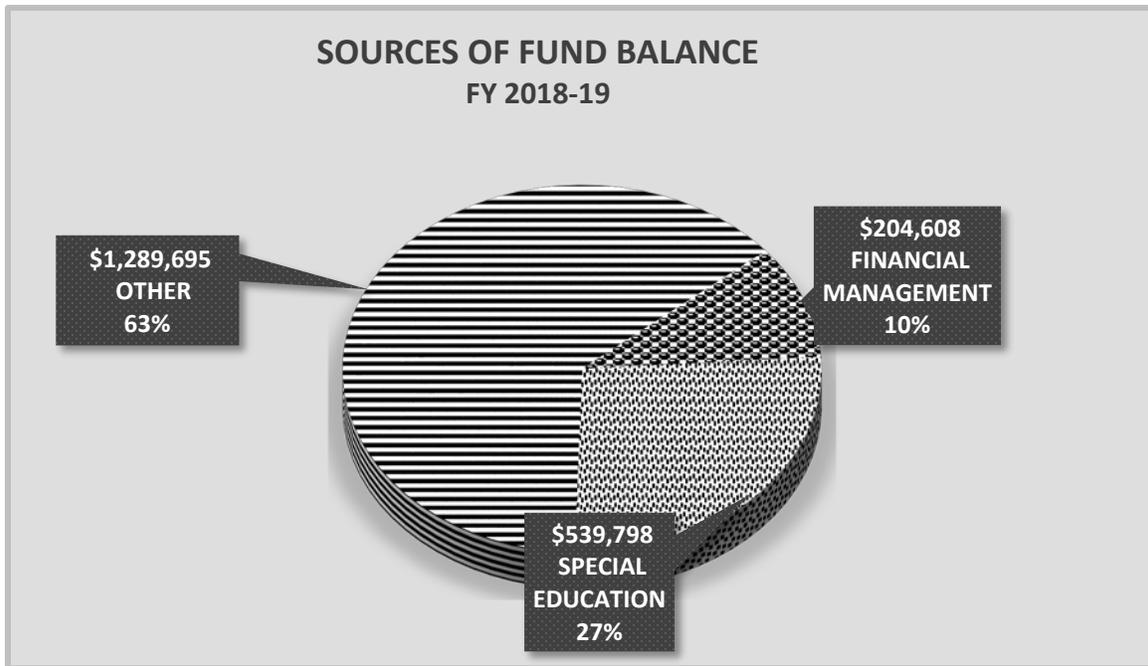
**\$378,012 REVENUE:** The Special Education Grant was higher than budgeted by \$224,297 based on actual special education costs and a higher reimbursement rate. The interest earned on the District's accounts was \$100,966 more than budgeted as interest rates were higher than budgeted. These accounts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

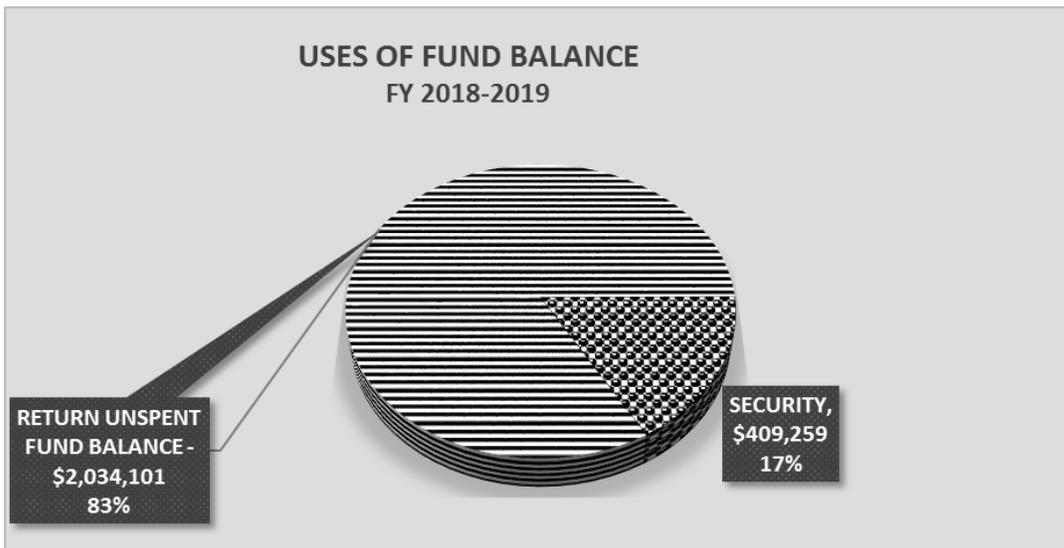
The primary sources of the fund balance are shown graphically below:



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 audited fund balance for 2019-2020 is \$1,953,498, after 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.

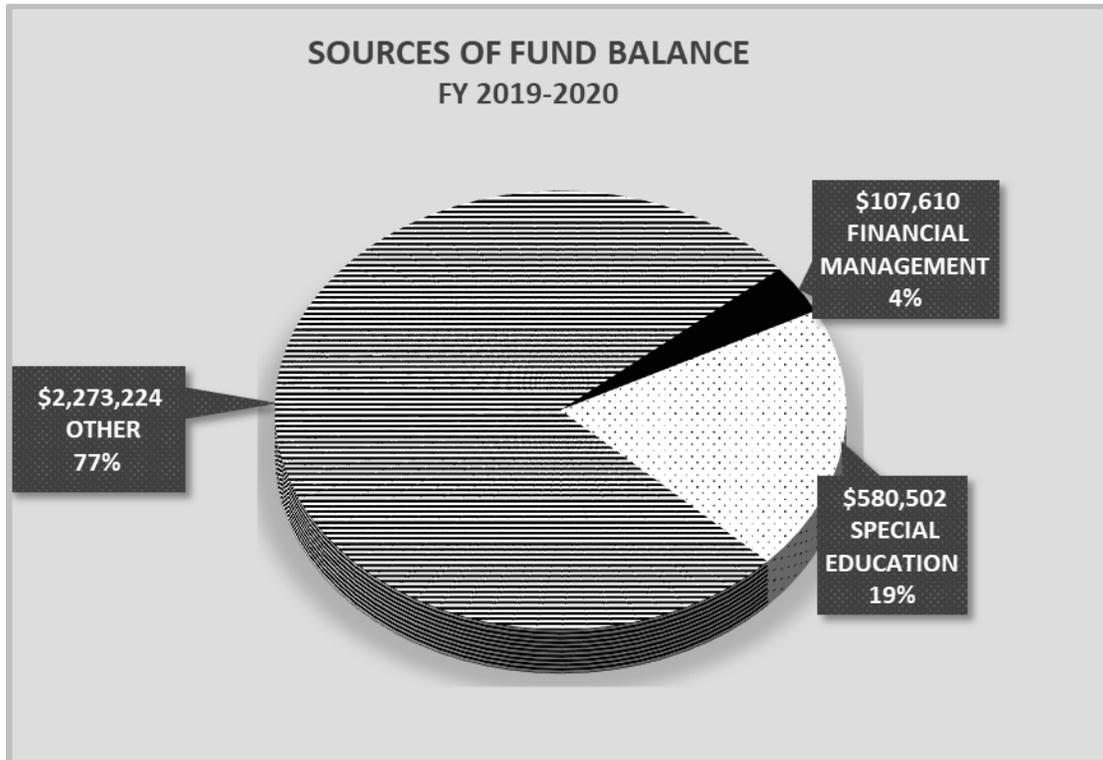
**\$93,339 UTILITIES (OTHER):** A mild winter combined with fuel cell operating properly to supply heat generated savings of \$17,731 FAV. Electricity usage was down due to the reduced occupancy in buildings, \$70,089 FAV.

**\$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):**

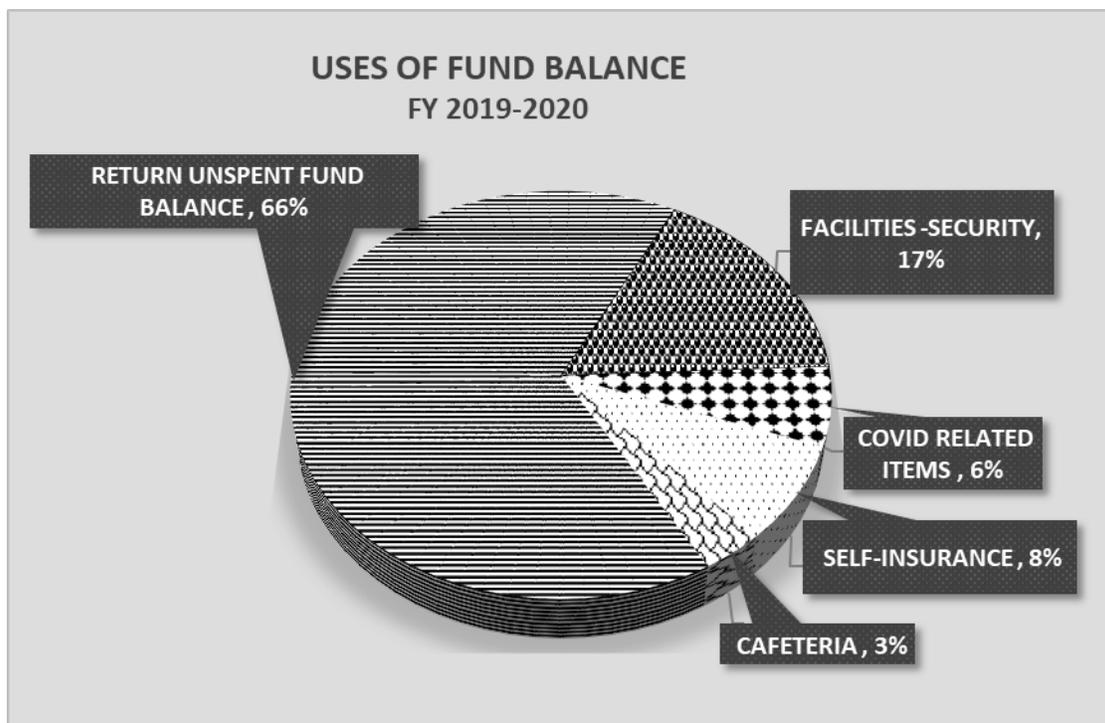
**\$229,311 SELF-INSURANCE FUNDING. (EOY):** The suspension of routine exams, diagnostic tests, dental appointments, and non-emergency surgeries reduced the medical claims for the final quarter of FY20. It is anticipated that once the State reopens the missed procedures will be scheduled, as well as 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 audited 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**

<b>MONTH/YR</b>	<b>JNL#</b>	<b>ACCOUNT NUMBER &amp; DESCRIPTION</b>	<b>AMOUNT</b>	<b>DESCRIPTION</b>
<b>JUL</b>				
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
<b>SEPT</b>				
2021-Sept	5	01-11-1005-5330 OTHER PROFESSIONAL & TECH SRVC	(600.00)	COVER COSTS OF ONLINE LICENSE
2021-Sept	5	01-11-1005-5641 TEXTBOOKS	600.00	COVER COSTS OF ONLINE LICENSE
2021-Sept	7	03-13-2400-5330 OTHER PROFESSIONAL & TECH SRVC	(1200.00)	UPDATE MASTERCAM SOFTWARE
2021-Sept	7	03-11-1008-5611 INSTRUCTIONAL SUPPLIES	1200.00	UPDATE MASTERCAM SOFTWARE
2021-Sept	8	01-11-1010-5690 OTHER SUPPLIES	(29.00)	COVER THE COST OF MEMBERSHIP F
2021-Sept	8	01-11-1010-5810 DUES & FEES	29.00	COVER THE COST OF MEMBERSHIP F
<b>OCT</b>				
2021-Oct	11	04-12-6111-5560 TUITION	(110.00)	TRANSPORTATION EZRA ACADEMY
2021-Oct	11	05-14-2700-5513 TRANSPORTATION	110.00	TRANSPORTATION EZRA ACADEMY
2021-Oct	78	02-11-1010-5420 REPAIR & MAINTENANCE	(720.00)	MUSICAL INSTRUMENT RENTAL
2021-Oct	78	02-11-1010-5440 RENTALS	720.00	MUSICAL INSTRUMENT RENTAL
2021-Oct	103	05-14-2310-5810 DUES & FEES	166.00	Cover cost of BOE Dues & Fees
2021-Oct	103	05-14-2320-5810 DUES & FEES	(166.00)	Cover cost of BOE Dues & Fees
2021-Oct	106	03-12-1203-5611 INSTRUCTIONAL SUPPLIES	(375.00)	MEMBERSHIP FEES
2021-Oct	106	04-13-2190-5810 DUES & FEES	375.00	MEMBERSHIP FEES
<b>NOV</b>				
2021-Nov	79	03-11-1001-5581 TRAVEL - CONFERENCES	(219.00)	COVER TEACHER DUES & FEES
2021-Nov	79	03-11-1001-5810 DUES & FEES	219.00	SCHOLASTICS COMPETITION
2021-Nov	123	01-11-1010-5330 OTHER PROFESSIONAL & TECH SRVC	(800.00)	ADDITIONAL CLASSROOM SUPPLIES
2021-Nov	123	01-11-1010-5611 INSTRUCTIONAL SUPPLIES	800.00	ADDITIONAL CLASSROOM SUPPLIES
<b>DEC</b>				
2021-Dec	416	03-14-2600-5613 MAINTENANCE/CUSTODIAL SUPPLIES	(709.00)	SNOW BLOWER REPLACEMENT
2021-Dec	416	03-14-2600-5731 EQUIPMENT REPLACEMENT	709.00	SNOW BLOWER REPLACEMENT
<b>JAN</b>				
2021-Jan	17	04-12-1206-5580 STAFF TRAVELS	(225.00)	MEMBERSHIP RENEWAL ASHA DUES
2021-Jan	18	04-13-2190-5810 DUES & FEES	225.00	MEMBERSHIP RENEWAL ASHA DUES
2021-Jan	69	01-13-2220-5330 OTHER PROFESSIONAL & TECH SRVC	(483.00)	Supplies for Tinker Space
2021-Jan	69	01-13-2220-5690 OTHER SUPPLIES	483.00	Supplies for Tinker Space
<b>FEB</b>				
2021-Feb	17	03-11-3202-5810 DUES & FEES	(124.00)	HUDL price increase
2021-Feb	17	03-11-3202-5590 OTHER PURCHASED SERVICES	124.00	HUDL price increase
2021-Feb	19	03-13-2220-5810 DUES & FEES	(34.00)	Unused dues and conferences
2021-Feb	19	03-13-2220-5690 OTHER SUPPLIES	34.00	to cover database shortfall
2021-Feb	20	01-11-1014-5611 INSTRUCTIONAL SUPPLIES	(42.00)	Cengage Learning price increas
2021-Feb	20	01-11-1014-5641 TEXTBOOKS	42.00	Cengage Learning price increas
2021-Feb	92	01-14-2700-5510 PUPIL TRANSPORTATION	(665.00)	Social Studies Amistad Program
2021-Feb	92	01-11-1014-5611 INSTRUCTIONAL SUPPLIES	665.00	Social Studies Amistad Program
<b>MARCH</b>				
2021-Mar	6	05-13-2212-5581 TRAVEL - CONFERENCES	(701.00)	Courageous Conversations PD
2021-Mar	6	05-13-2212-5322 INSTRUCTIONAL PROG IMPROVEMENT	701.00	Courageous Conversations PD
2021-Mar	7	01-11-1005-5611 INSTRUCTIONAL SUPPLIES	(180.00)	Behaviorial Incentive Program
2021-Mar	7	01-11-1005-5690 OTHER SUPPLIES	180.00	Behaviorial Incentive Program
2021-Mar	8	01-11-1010-5330 OTHER PROFESSIONAL & TECH SRVC	(257.00)	online audio studio subscripti
2021-Mar	8	01-11-1010-5690 OTHER SUPPLIES	257.00	online audio studio subscripti
2021-Mar	26	02-13-2220-5611 INSTRUCTIONAL SUPPLIES	(886.00)	Media Center Books
2021-Mar	26	02-13-2220-5642 LIBRARY BOOKS & PERIODICALS	886.00	Media Center Books

**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-Mar	26	02-13-2220-5690 OTHER SUPPLIES	(1394.00)	Media Center Books
2021-Mar	26	02-13-2220-5642 LIBRARY BOOKS & PERIODICALS	1394.00	Media Center Books
2021-Mar	168	05-14-2310-5810 DUES & FEES	240.00	Membership fees increased
2021-Mar	168	05-14-2320-5810 DUES & FEES	(240.00)	Membership fees increased
2021-Mar	203	05-13-2213-5590 OTHER PURCHASED SERVICES	(748.00)	Years of Service Gifts
2021-Mar	203	05-13-2213-5690 OTHER SUPPLIES	748.00	Years of Service Gifts
2021-Mar	224	03-11-1001-5581 TRAVEL - CONFERENCES	(206.00)	no travel funds need for suppl
2021-Mar	224	03-11-1001-5611 INSTRUCTIONAL SUPPLIES	206.00	no travel funds need for suppl
2021-Mar	225	03-11-1001-5730 EQUIPMENT - NEW	(200.00)	funds needed for instr supplie
2021-Mar	225	03-11-1001-5611 INSTRUCTIONAL SUPPLIES	200.00	funds needed for instr supplie
2021-Mar	226	03-11-1001-5810 DUES & FEES	(425.00)	funds needed for instr supply
2021-Mar	226	03-11-1001-5611 INSTRUCTIONAL SUPPLIES	425.00	funds needed for instr supply
2021-Mar	243	03-13-2220-5810 DUES & FEES	(336.00)	Cancelled conference
2021-Mar	243	03-13-2220-5611 INSTRUCTIONAL SUPPLIES	336.00	Additional supplies
2021-Mar	244	03-13-2220-5330 OTHER PROFESSIONAL & TECH SRVC	(1000.00)	Cancelled speakers
2021-Mar	244	03-13-2220-5642 LIBRARY BOOKS & PERIODICALS	1000.00	Book purchase
2021-Mar	278	05-13-2213-5580 STAFF TRAVEL	(2000.00)	Yrs Service, Excellence, Retir
2021-Mar	278	05-13-2213-5690 OTHER SUPPLIES	(2000.00)	Yrs Service, Excellence, Retir
2021-Mar	309	02-13-2130-5690 OTHER SUPPLIES	(1.00)	PRICE INCREASE ON MEMBERSHIP
2021-Mar	309	02-13-2130-5810 DUES & FEES	1.00	PRICE INCREASE ON MEMBERSHIP
2021-Mar	313	03-11-1010-5810 DUES & FEES	(62.00)	Additional supplies needed
2021-Mar	313	03-11-1010-5611 INSTRUCTIONAL SUPPLIES	62.00	Additional supplies needed
2021-Mar	323	03-11-1011-5330 OTHER PROFESSIONAL & TECH SRVC	(425.00)	PURCHASE ADD'L CLASSRM SUPPLY
2021-Mar	323	03-11-1011-5611 INSTRUCTIONAL SUPPLIES	425.00	PURCHASE ADD'L CLASSRM SUPPLY
2021-Mar	324	03-11-1010-5330 OTHER PROFESSIONAL & TECH SRVC	(1396.00)	baby grand extensive repair
2021-Mar	324	03-11-1010-5420 REPAIRS,MAINTENANCE & CLEANING	1396.00	baby grand extensive repair
2021-Mar	331	03-11-1010-5330 OTHER PROFESSIONAL & TECH SRVC	(345.00)	For Bass Repairs
2021-Mar	331	03-11-1010-5420 REPAIRS,MAINTENANCE & CLEANING	345.00	For Bass Repairs
2021-Apr	333	03-11-1001-5611 INSTRUCTIONAL SUPPLIES	(600.00)	camera need for photo instead
2021-Apr	333	03-11-1001-5730 EQUIPMENT - NEW	600.00	camera need for photo instead
2021-Mar	334	03-11-1010-5611 INSTRUCTIONAL SUPPLIES	(155.00)	bass repair needed for strings
2021-Mar	334	03-11-1010-5420 REPAIRS,MAINTENANCE & CLEANING	155.00	bass repair needed for strings
<b>APRIL</b>				
2021-Apr	11	01-13-2120-5590 OTHER PURCHASED SERVICES	(30.00)	registration conference fee
2021-Apr	11	01-13-2120-5810 DUES & FEES	30.00	registration conference fee
2021-Apr	12	01-11-1014-5810 DUES & FEES	(120.00)	DVD's & Books
2021-Apr	12	01-11-1014-5641 TEXTBOOKS	(112.00)	DVD's & Books
2021-Apr	12	01-11-1014-5611 INSTRUCTIONAL SUPPLIES	232.00	DVD's & Books
2021-Apr	13	04-13-2140-5730 EQUIPMENT - NEW	2250.00	LAPTOPS - PPS COORDINATORS
2021-Apr	13	04-12-6116-5510 PUPIL TRANSPORTATION	(2250.00)	LAPTOPS - PPS COORDINATORS
2021-Apr	14	04-12-2150-5690 OTHER SUPPLIES	412.00	GUIDED THERAPY EVERYDAY SPEECH
2021-Apr	14	04-12-6116-5510 PUPIL TRANSPORTATION	(412.00)	GUIDED THERAPY EVERYDAY SPEECH

**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-Apr	16	04-13-2190-5690 OTHER SUPPLIES	1000.00	PROTOCOLS FOR STUDENT TESTING
2021-Apr	16	04-12-6116-5510 PUPIL TRANSPORTATION	(1000.00)	PROTOCOLS FOR STUDENT TESTING
2021-Apr	27	03-11-1017-5611 INSTRUCTIONAL SUPPLIES	(12.00)	item for brady center
2021-Apr	27	03-11-1017-5330 OTHER PROFESSIONAL & TECH SRVC	12.00	item for brady center
2021-Apr	51	04-13-2140-5611 INSTRUCTIONAL SUPPLIES	(324.00)	LAPTOPS FOR COORDINATORS
2021-Apr	51	04-13-2140-5730 EQUIPMENT - NEW	324.00	LAPTOPS FOR COORDINATORS
2021-Apr	113	05-13-2212-5322 INSTRUCTIONAL PROG IMPROVEMENT	4800.00	Correct Acct on JE 2021-10-107
2021-Apr	113	05-13-2212-5330 OTHER PROFESSIONAL & TECH SRVC	(4800.00)	Correct Acct on JE 2021-10-107
2021-Apr	114	05-14-2675-5440 RENTALS-LAND,BLDG,EQUIPMENT	4151.00	15% Hold fr Budget for COVID
2021-Apr	114	05-14-2675-5611 INSTRUCTIONAL SUPPLIES	6079.00	15% Hold fr Budget for COVID
2021-Apr	114	05-14-2675-5613 MAINTENANCE/CUSTODIAL SUPPLIES	11070.00	15% Hold fr Budget for COVID
2021-Apr	114	05-14-2675-5690 OTHER SUPPLIES	27694.00	15% Hold fr Budget for COVID
2021-Apr	114	05-14-2675-5730 EQUIPMENT - NEW	10000.00	15% Hold fr Budget for COVID
2021-Apr	114	01-11-1005-5641 TEXTBOOKS	(1485.00)	15% Hold fr Budget for COVID
2021-Apr	114	01-11-1010-5420 REPAIRS,MAINTENANCE & CLEANING	(540.00)	15% Hold fr Budget for COVID
2021-Apr	114	01-11-1011-5420 REPAIRS,MAINTENANCE & CLEANING	(150.00)	15% Hold fr Budget for COVID
2021-Apr	114	01-11-1013-5510 PUPIL TRANSPORTATION	(90.00)	15% Hold fr Budget for COVID
2021-Apr	114	01-11-1014-5641 TEXTBOOKS	(210.00)	15% Hold fr Budget for COVID
2021-Apr	114	01-11-1016-5641 TEXTBOOKS	(215.00)	15% Hold fr Budget for COVID
2021-Apr	114	01-11-3202-5420 REPAIRS,MAINTENANCE & CLEANING	(225.00)	15% Hold fr Budget for COVID
2021-Apr	114	01-11-3202-5510 PUPIL TRANSPORTATION	(2556.00)	15% Hold fr Budget for COVID
2021-Apr	114	01-13-2400-5420 REPAIRS,MAINTENANCE & CLEANING	(75.00)	15% Hold fr Budget for COVID
2021-Apr	114	01-14-2700-5510 PUPIL TRANSPORTATION	(533.00)	15% Hold fr Budget for COVID
2021-Apr	114	05-14-2700-5514 IN DISTRICT PUBLIC REG ED-MED	(5435.00)	15% Hold fr Budget for COVID
2021-Apr	114	01-11-1005-5641 TEXTBOOKS	(1564.00)	15% Hold fr Budget for COVID
2021-Apr	114	02-11-1008-5420 REPAIRS,MAINTENANCE & CLEANING	(75.00)	15% Hold fr Budget for COVID
2021-Apr	114	02-11-1010-5420 REPAIRS,MAINTENANCE & CLEANING	(630.00)	15% Hold fr Budget for COVID
2021-Apr	114	02-11-1011-5420 REPAIRS,MAINTENANCE & CLEANING	(60.00)	15% Hold fr Budget for COVID
2021-Apr	114	02-11-3202-5420 REPAIRS,MAINTENANCE & CLEANING	(225.00)	15% Hold fr Budget for COVID
2021-Apr	114	02-11-3202-5510 PUPIL TRANSPORTATION	(2556.00)	15% Hold fr Budget for COVID
2021-Apr	114	02-13-2400-5420 REPAIRS,MAINTENANCE & CLEANING	(75.00)	15% Hold fr Budget for COVID
2021-Apr	114	02-14-2700-5510 PUPIL TRANSPORTATION	(450.00)	15% Hold fr Budget for COVID
2021-Apr	114	03-11-1001-5730 EQUIPMENT - NEW	(150.00)	15% Hold fr Budget for COVID
2021-Apr	114	03-11-1005-5641 TEXTBOOKS	(1110.00)	15% Hold fr Budget for COVID
2021-Apr	114	03-11-1006-5641 TEXTBOOKS	(300.00)	15% Hold fr Budget for COVID
2021-Apr	114	03-11-1008-5420 REPAIRS,MAINTENANCE & CLEANING	(165.00)	15% Hold fr Budget for COVID
2021-Apr	114	03-11-1009-5641 REPAIRS,MAINTENANCE & CLEANING	(1237.00)	15% Hold fr Budget for COVID
2021-Apr	114	03-11-1010-5420 REPAIRS,MAINTENANCE & CLEANING	(776.00)	15% Hold fr Budget for COVID
2021-Apr	114	03-11-1013-5420 REPAIRS,MAINTENANCE & CLEANING	(150.00)	15% Hold fr Budget for COVID
2021-Apr	114	03-11-1013-5641 TEXTBOOKS	(225.00)	15% Hold fr Budget for COVID
2021-Apr	114	03-11-3202-5420 REPAIRS,MAINTENANCE & CLEANING	(5083.00)	15% Hold fr Budget for COVID
2021-Apr	114	03-11-3202-5510 PUPIL TRANSPORTATION	(26199.00)	15% Hold fr Budget for COVID
2021-Apr	114	03-13-2400-5420 REPAIRS,MAINTENANCE & CLEANING	(300.00)	15% Hold fr Budget for COVID
2021-Apr	114	03-13-2400-5641 TEXTBOOKS	(900.00)	15% Hold fr Budget for COVID
2021-Apr	114	03-14-2700-5510 PUPIL TRANSPORTATION	(5250.00)	15% Hold fr Budget for COVID
2021-Apr	121	05-14-2350-5581 TRAVEL - CONFERENCES	(1785.00)	TRANSF. RAPTOR RENEWAL
2021-Apr	121	05-14-2350-5690 OTHER SUPPLIES	1785.00	TRANSF. RAPTOR RENEWAL
2021-Apr	168	03-13-2400-5580 STAFF TRAVEL	(2000.00)	purchase of cameras,art equipm
2021-Apr	168	03-11-1001-5730 EQUIPMENT - NEW	2000.00	purchase of cameras,art equipm
2021-Apr	169	03-13-2400-5580 STAFF TRAVEL	(600.00)	purchase of film equipment
2021-Apr	169	03-11-1017-5730 EQUIPMENT - NEW	600.00	purchase of film equipment

**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-Apr	171	05-14-2320-5550 COMMUNICATIONS: TEL,POST,ETC.	1160.00	Legal Notices posted in papers
2021-Apr	171	05-14-2320-5580 STAFF TRAVEL	(1160.00)	Legal Notices posted in papers
2021-Apr	183	01-13-2400-5581 TRAVEL - CONFERENCES	(125.00)	Reimbursmt staff meeting lunch
2021-Apr	183	01-14-2219-5690 OTHER SUPPLIES	125.00	Reimbursmt staff meeting lunch
<b>MAY '2021</b>				
2021-May	8	03-13-2400-5641 TEXTBOOKS	(250.00)	flowers teacher appreciation
2021-May	8	03-13-2400-5330 OTHER PROFESSIONAL & TECH SRVC	250.00	flowers teacher appreciation
2021-May	30	01-11-1011-5810 DUES & FEES	(425.00)	Adaptive Games for Field Day
2021-May	30	01-11-1011-5611 INSTRUCTIONAL SUPPLIES	425.00	Adaptive Games for Field Day
2021-May	32	04-12-6130-5560 TUITION EXPENSE	(2560.00)	LAPTOPS FOR NURSES (4)
2021-May	32	04-13-2140-5730 EQUIPMENT - NEW	2560.00	LAPTOPS FOR NURSES (4)
2021-May	37	01-11-1005-5330 OTHER PROFESSIONAL & TECH SRVC	(270.00)	misc exps end of yr activities
2021-May	37	01-11-1005-5611 INSTRUCTIONAL SUPPLIES	(180.00)	misc exps end of yr activities
2021-May	37	01-11-1005-5641 TEXTBOOKS	(91.00)	misc exps end of yr activities
2021-May	37	01-11-1005-5690 OTHER SUPPLIES	(43.00)	misc exps end of yr activities
2021-May	37	01-11-1006-5611 INSTRUCTIONAL SUPPLIES	(259.00)	misc exps end of yr activities
2021-May	37	01-11-1007-5611 INSTRUCTIONAL SUPPLIES	(118.00)	misc exps end of yr activities
2021-May	37	01-11-1009-5611 INSTRUCTIONAL SUPPLIES	(412.00)	misc exps end of yr activities
2021-May	37	01-11-1009-5810 DUES & FEES	(530.00)	misc exps end of yr activities
2021-May	37	01-11-1013-5510 PUPIL TRANSPORTATION	(510.00)	misc exps end of yr activities
2021-May	37	01-11-1013-5611 INSTRUCTIONAL SUPPLIES	(12.00)	misc exps end of yr activities
2021-May	37	01-11-1013-5690 OTHER SUPPLIES	(22.00)	misc exps end of yr activities
2021-May	37	01-11-1016-5641 TEXTBOOKS	(125.00)	misc exps end of yr activities
2021-May	37	01-11-1016-5810 DUES & FEES	(168.00)	misc exps end of yr activities
2021-May	37	01-11-3201-5690 OTHER SUPPLIES	2740.00	misc exps end of yr activities
2021-May	179	02-14-2600-5613 MAINTENANCE/CUSTODIAL SUPPLIES	2141.00	Flooring for exercise room
2021-May	179	02-11-1011-5611 INSTRUCTIONAL SUPPLIES	(2141.00)	Flooring for exercise room
2021-May	229	01-11-1015-5810 DUES & FEES	(467.00)	to purchase needed supplies
2021-May	229	01-11-1008-5810 DUES & FEES	(100.00)	to purchase needed supplies
2021-May	229	01-13-2220-5690 OTHER SUPPLIES	567.00	to purchase needed supplies
2021-May	230	04-12-1200-5611 INSTRUCTIONAL SUPPLIES	1268.00	WOODCOCK JOHNSON IV TEST KIT
2021-May	230	04-12-6116-5510 PUPIL TRANSPORTATION	(1268.00)	WOODCOCK JOHNSON IV TEST KIT
2021-May	231	01-14-2219-5611 INSTRUCTIONAL SUPPLIES	(1000.00)	T-Shirts for spirit events
2021-May	231	01-13-2400-5690 OTHER SUPPLIES	1000.00	T-Shirts for spirit events

# AMITY REGIONAL SCHOOL DISTRICT NO. 5

Bethany Orange Woodbridge  
25 Newton Road, Woodbridge Connecticut 06525



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

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

To: Jennifer Byars, Ed. D., Superintendent of Schools  
From: Theresa Lumas, Director of Finance and Administration  
Re: Budget Transfers over \$3,000 for FY 2020-21  
Date: June 1, 2021

## **1a. Technology - Staff Laptops:**

Many of the staff do not have a laptop to work remotely or their existing laptop is past its useful life. Several are failing and old version loaners are provided if available. The devices for administrators are \$1,617.00 each and 11 are needed totaling \$17,787. Devices for support staff are \$832 each and 33 are needed totaling \$27,456. Pricing is from bids awarded through the MHEC purchasing consortium. The total purchase request is \$45,243, the transfer totals \$40,243 since \$5,000 is remaining on the new equipment line.

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

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

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

*Move to approve...*

*the following budget transfer to cover purchasing staff devices.*

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
05-14-2350-5420	Repair & Maintenance	\$15,624	
05-14-2350-5550	Communications	\$ 4,764	
05-14-2350-5581	Conferences	\$ 4,865	
05-15-0000-5850	Contingency	\$14,990	
05-14-2350-5730	Equipment - New		\$22,456
05-14-2350-5731	Equipment - Replacement		\$17,787

## **1b. Technology- Promethean ActiveBoards (Smartboards):**

The Prometheans were removed from the budget. Currently there are 2 that are not repairable and there is no funds in the budget to replace any that fail during next year. The request is for 4 Prometheans, at \$4,722 each from the awarded State of CT audio visual contract. The total request costs \$18,338 with shipping.

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

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

**For the Amity Board of Education:**

*Move to approve...*

*the following budget transfer to cover purchasing Prometheans ActiveBoards.*

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
05-14-2350-5420	Repair & Maintenance	\$18,338	
05-14-2350-5731	Equipment - Replacement		\$18,338

**1c. Technology- Student Devices Buyout:**

This request is to cover the estimated costs of unreturnable devices. The estimate is \$20,000 UNF for student devices that will be unreturnable at the end of the first 3-year lease cycle. The administration is working with the lease company to determine the fair market value of replacement items. The damaged devices will be retained in-house and utilized for parts in repairing other devices.

**For the Amity Finance Committee:**

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

**For the Amity Board of Education:**

*Move to approve...*

*the following budget transfer to cover purchasing student devices.*

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
03-14-2700-5510	Transportation	\$20,000	
05-14-2350-5731	Equipment - Replacement		\$20,000

**2a. Security - Technology Telephone System:**

The District's phone system is no longer supported and is on the capital plan for replacement. The State is offering another round of security grant funding and the phone system is an eligible item. The District must allocate funding for the project in order to be eligible for reimbursement. The reimbursement rate averages 35% between all three towns. An RFP was posted for VoIP systems on premises and cloud based. A mandatory site visit was held on June 1, 2021. 19 vendors attended. Proposals were due on June 9, 2021 and 15 vendors submitted proposals. The District will apply for reimbursement from the State Department of Education. The District is required to secure funding first.

The Director of Technology and Network Administrator are reviewing all proposals and a recommendation will be brought forward to Monday's meeting.

**For the Amity Finance Committee:**

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

**For the Amity Board of Education:**

*Move to approve...*

*the following budget transfer to cover a new phone system.*

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
05-15-2512-5255	Medical	\$XX,XXX	
05-14-2660-5715	Security-Improvements to Bldgs		\$XX,XXX

**2b. Security - Technology Key Card Access:**

Additional key card access points are requested at each building. Increasing the entrances equipped with key card access allows for multiple re-entry points in the event of a security concern on the grounds. Student time outdoors has increased with COVID-19 and will continue beyond the pandemic. There is a total of 3 additional access points at each school requested.

The District will apply for reimbursement from the State Department of Education. The reimbursement rate is approximately 35%. The District is required to secure funding first.

**For the Amity Finance Committee:**  
*Recommend the Amity Board of Education approve ...*

**For the Amity Board of Education:**  
*Move to approve...*

*the following budget transfer to cover installing additional key card access points at all three buildings.*

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
03-11-3202-5510	Transportation	\$42,370	
05-15-0000-5850	Contingency	\$ 7,374	
05-14-2660-5715	Security-Improvements to Bldgs		\$49,744

**2c. Security - Facilities:**

The District is seeking to increase the windows covered by protective film. Additional window film projects are eligible and will be included in the grant application. The District will apply for reimbursement from the State Department of Education. The reimbursement rate is approximately 35%. The District is required to secure funding first.

**For the Amity Finance Committee:**  
*Recommend the Amity Board of Education approve ...*

**For the Amity Board of Education:**  
*Move to approve...*

*the following budget transfer to cover the window film at all 3 schools.*

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
01-14-2600-5613	Custodial Supplies	\$ 8,000	
02-14-2600-5613	Custodial Supplies	\$ 7,150	
03-14-2600-5613	Custodial Supplies	\$22,000	
05-14-2660-5715	Security –Improvements to Bldgs		\$37,150

**2d. Security - Facilities:**

The field on the side of Amity Middle School – Bethany is used for many activities. One end of the field is assessable from the road. The request is to install a fence to increase the safety of field activities. Fencing projects that aid in securing grounds are eligible and will be included in the grant application. The District will apply for reimbursement from the State Department of Education. The reimbursement rate is approximately 35%. The District is required to secure funding first.

**For the Amity Finance Committee:**

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

**For the Amity Board of Education:**

*Move to approve...*

*the following budget transfer to cover the installation of a fence on the Amity Middle School Bethany property.*

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
01-14-2600-5613	Custodial Supplies	\$ 5,000	
05-14-2660-5720	Security –Improvements to Sites		\$5,000

**3. Cafeteria:**

The Cafeteria Fund has operated at a deficit all year due to the limited operations under pandemic conditions. Ala carte sales, a \$281,152 revenue source was only available on a limited basis in the middle school since April. The total for this year was only \$7,520. Participation is lower than expected with breakfast and lunch provided for free under the State of CT and USDA National School Lunch Program. The District received and applied \$21,928 in grant funding toward this deficit. The current loss for the year is projected to be \$122,783. The request is for \$31,440 to transfer to the cafeteria fund.

**For the Amity Finance Committee:**

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

**For the Amity Board of Education:**

*Move to approve...*

*the following budget transfer to cover the deficit in the School Lunch Account.*

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
05-15-0000-5850	Contingency	\$31,440	
10-1021	School Lunch Cash Account		\$31,440

**4. Staff Development:**

Dr. McPadden is requesting a transfer to cover the costs of presenters for Readers' Workshop. Administrators, language arts teachers, principals, and reading coaches will participate. Training is scheduled this month for two days.

**For the Amity Finance Committee:**  
*Recommend the Amity Board of Education approve ...*

**For the Amity Board of Education:**  
*Move to approve...*

*the following budget transfer to cover the cost of presenters for staff development in June.*

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
05-13-2213-5111	Certified Salaries	\$5,000	
05-13-2213-5322	Professional, Technical Services		\$5,000

**5. Special Education:**

Mr. Brant, the Director of Special Education, is requesting funds be transferred to cover purchases. Due to the COVID-19 Pandemic and an end of the year increase in referrals to special education, additional funds are required to purchases protocols and assessments to complete outstanding evaluations.

**For the Amity Finance Committee:**  
*Recommend the Amity Board of Education approve ...*

**For the Amity Board of Education:**  
*Move to approve...*

*the following budget transfer to cover the purchase of protocols and assessments.*

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
04-12-1200-5330	Professional Technical Serv	\$1,650	
04-13-2190-5611	Instructional Supplies		\$1,650
04-12-6116-5510	Transportation- Public In District	\$4,472	
04-13-2140-5611	Instructional Supplies		\$4,472

**6. Bethany Middle School:**

Dr. Tracy has requested to purchase 25 guitars, mini amps, stands, picks and plugs. He has stated that with the addition of Music to the rounds this coming school year, there is a need to incorporate additional instruments as this class set will allow for whole-group instruction and provide variety to the established curricula. AMSO has enough guitars but may need to order amps, and those are under \$3,000.

**For the Amity Finance Committee:**

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

**For the Amity Board of Education:**

*Move to approve...*

*the following budget transfer to cover the purchase of guitars for music class.*

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
01-11-1001-5611	Instructional Supplies	\$ 450	
01-11-1014-5611	Instructional Supplies	\$ 54	
01-13-2130-5581	Travel – Conferences	\$ 140	
01-13-2400-5581	Travel - Conferences	\$ 2,500	
01-11-1010-5611	Instructional Supplies	\$ 841	
04-13-2140-5611	Instructional Supplies		\$3,985

**7. COVID:**

This transfer request is for expenses in the COVID accounts for rentals and professional technical services related to end of year ceremonies conducted under pandemic guidelines. This will bring all COVID accounts in balance except for the salary accounts for COVID which will be adjusted with all salary accounts at the end of the year.

The total of this transfer request is \$49,126 requiring Board of Education approval.

**Motions:**

**For the Amity Finance Committee:**

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

**For the Amity Board of Education:**

*Move to approve –*

*the following budget transfer to cover the cost of operations including rentals and professional technical services \$49,126.*

ACCOUNT	ACCOUNT NAME	FROM	TO
05142675-5330	Professional Technical Serv		\$ 6,043
05142675-5440	Rentals		\$ 43,083
04126130-5510	Transportation	\$ 49,126	\$ -

**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: Capital Projects FY 2020-21 Change Order and Budget Transfer  
Date: May 21, 2021

**Stadium Project Change Order #4:**

The District was issued a Stop Work Order on the Stadium Project on April 6, 2021. A dozer with a laser and a bobcat with technology were rented by the contractor and on-site. The equipment rental was extended 5 days longer than scheduled because of the delay. Cost is \$16,445.15.

**Motions for Change Order #4:**

**For the Amity Finance Committee:**

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

**For the Amity Board of Education:**

*Move to approve –*

*Change order 4 to increased equipment rental costs due to Stop Work Order totaling \$16,445.15.*

**Motions for Budget Transfer:**

**For the Amity Finance Committee:**

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

**For the Amity Board of Education:**

*Move to approve...*

*A transfer from Bond Contingency Account to the Athletic Project Account for Change order 4 to cover increased equipment rental costs due to Stop Work Order totaling \$16,446.00 at the stadium at Amity High School.*

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
17-00-15-0053-5720	Bond Contingency	\$16,446	

**HVAC Change Order #1:**

The air handler units for the guidance area are too large to fit through the maintenance doorway. All Trade Industries, the vendor who did the work to open the wall in the photo class can remove the doorframe and a row of cinderblock to enlarge the entryway. The entry way will be reconstructed after all units are in the building. The change includes replacing the doorframe, as it is likely the frame will be bent during removal. The existing doors will be rehung. Cost is \$5,800.00.

**Motions for HVAC Change Order #1:**

**For the Amity Finance Committee:**

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

**For the Amity Board of Education:**

*Move to approve –*

*HVAC Change order 1 to enlarge doorway for equipment access totaling \$5,800.00.*

**Motions for Budget Transfer:**

**For the Amity Finance Committee:**

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

**For the Amity Board of Education:**

*Move to approve...*

*A transfer from Bond Contingency Account to the HVAC Project Account for Change order 1 to cover enlarging a doorway to bring in HVAC equipment at Amity High School.*

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
17-00-15-0053-5720	Bond Contingency	\$5,800	
17-00-15-0048-5715	HVAC Projects		\$5,800

**HVAC Change Order #2:**

The work on the air handler units for the guidance area will require shut down of a unit that serves technology and the media center. Mr. Martoni searched for a temporary air condition solution for these areas which allows the technology staff to continue working and protects the devices and library books from humid conditions. The price quoted \$6,338 is for one month, however the timeframe is dependent upon the guidance suite air handler return to full function. The timeframe may extend into August. The request is for 2 months of temporary air conditioning. The total request is for \$12,676.

**Motions for HVAC Change Order #2:**

**For the Amity Finance Committee:**

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

**For the Amity Board of Education:**

*Move to approve –*

*HVAC Change order #2 to install temporary air conditioning to the library media/technology area up to \$12,676 for 2 months.*

**Motions for Budget Transfer:**

**For the Amity Finance Committee:**

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

**For the Amity Board of Education:**

*Move to approve...*

*A transfer from Bond Contingency Account to the HVAC Project Account for HVAC Change order #2 to install temporary air conditioning to the library media/technology area up to \$12,676 for 2 months at Amity High School and waive the bid requirement.*

<b>ACCOUNT NUMBER</b>	<b>ACCOUNT NAME</b>	<b>FROM</b>	<b>TO</b>
17-00-15-0053-5720	Bond Contingency	\$12,676	
17-00-15-0048-5715	HVAC Project		\$12,676

The balance in the project contingency account will be \$258,064 if the budget transfers are approved.

ORG	ORG/PER	ACCOUNT	ACCOUNT DESCRIPTION	Description	ORIGINAL APPROP	TRANFRS/ADJSMTS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCE	AVAILABLE BUDGET	VENDOR NAME	COMMENT
<b>17 -00-15-0047-5720</b>			<b>IMPROVEMENTS TO SITES</b>	<b>Athletics</b>	<b>3,167,960</b>	<b>156,094</b>	<b>3,324,054</b>	<b>2,607,696.73</b>	<b>716,357.3</b>	<b>-</b>		
00150047	00150047	0047-5720	80	09/01/2020	API	241406	115998	175,500.00			FIELDTURF	ATHLETIC TURF
			119	10/07/2020	API	241406	116784	173,250.00			FIELDTURF	ATHLETIC TURF
			185	10/26/2020	API	241406	117441	35,199.90			FIELDTURF	ATHLETIC TURF
				12/04/2020		251145	API	500.00			J & M LANDSCAPING	Service - Field 3 Project
			185	10/26/2020	API	241406	117441	35,199.90			FIELDTURF	ATHLETIC TURF
			304	03/30/2021	API	241406	117441	434,691.00			FIELDTURF	ATHLETIC TURF
			99	05/11/2021	API	241406	117441	101,700.00			FIELDTURF	ATHLETIC TURF
				06/08/2021	API	241406	117441	972,673.45			FIELDTURF	ATHLETIC TURF
<b>17 -00-15-0048-5715</b>			<b>IMPROVEMENTS TO BUILDINGS</b>	<b>HVAC</b>	<b>1,830,630</b>	<b>42,970</b>	<b>1,873,600</b>	<b>678,982.48</b>	<b>1,198,270.00</b>	<b>(3,652.48)</b>		
			79	5/22/2020	API	241814		14,725.00			SAV-MOR COOLING & HEATING INC	
			140	07/17/2020	API	241814		196,555.00	Y		SAV-MOR COOLING & HEATING INC	SERVICE - CONTRACT - AMITY HIG
			184	09/01/2020	API	241814		275,321.91	Y		SAV-MOR COOLING & HEATING INC	SERVICE - CONTRACT - AMITY HIG
			184	09/01/2020	API	241814		50,416.67	Y		SAV-MOR COOLING & HEATING INC	SERVICE - CONTRACT - AMITY HIG
			4	09/01/2020	API	241814		80,199.00	Y		SAV-MOR COOLING & HEATING INC	SERVICE - CONTRACT - AMITY HIG
			298	12/09/2020	API	241814		1,662.50	Y		SAV-MOR COOLING & HEATING INC	SERVICE - CONTRACT - AMITY HIG
			37	01/07/2021	API	241814		33,072.64	Y		SAV-MOR COOLING & HEATING INC	SERVICE - CONTRACT - AMITY HIG
				04/30/2021	API	251440		21,330.00	Y		SAV-MOR COOLING & HEATING INC	SERVICE - CONTRACT - AMITY HIG
				05/04/2021	API	250900		5,699.76	Y		VANZELM ENGINEERS	SERVICES HVAC
<b>17 -00-15-0049-5715</b>			<b>IMPROVEMENTS TO BUILDINGS</b>	<b>Chillers</b>	<b>140,000</b>	<b>-3,178</b>	<b>136,822</b>	<b>136,822.00</b>	<b>0.00</b>	<b>-</b>		
			40	09/01/2020	API	329846	241572	115945	136,822.00	Y	TRANE BUILDING SERVICES	SERVICE - Contract HVAC
<b>17 -00-15-0050-5715</b>			<b>IMPROVEMENTS TO BUILDINGS</b>	<b>Paving</b>	<b>600,000</b>	<b>0</b>	<b>600,000</b>	<b>270,514.80</b>	<b>0.00</b>	<b>329,485.20</b>		
			184	09/01/2020	API	372188	242291	116171	270,514.80		B & W PAVING & LANDSCAPING, LLC	SERVICE - PARKING LOT
<b>17 -00-15-0051-5330</b>			<b>OTHER PROFESSIONAL &amp; TECH SRVC</b>	<b>COI</b>	<b>108,018</b>	<b>-39,156</b>	<b>68,862</b>	<b>68,862.12</b>	<b>0.00</b>	<b>-</b>		
				2021/01/0000	07/17/2020	API	250130	15,500.00			S & P RATINGS	ANALYTICAL SERVICES WITH U
				2021/01/0000	07/17/2020	API	250133	21,700.00			DAY PITNEY LLP	PROFESSIONAL SERVICES- BOND
				2021/01/0001	07/17/2020	API	250139	394.52			TECHNIQUE PRINTERS I	FINAL OFFICIAL STATEMENT -
				2021/01/0001	07/17/2020	API	250188	26,000.00			HILLTOPSECURITIES	FINANCIAL ADVISORY FEES, D
				2021/02/0000	08/03/2020	API	250131	4,000.00			US BANK	CERTIFYING, REGISTRAR, TRA
				2021/03/0000	09/01/2020	API	250454	500.00			ARIZENT	ONLINE LEGAL AD- NOTICE OF
				2021/05/0000	11/09/2020	API	250958	767.60			IPREO, LLC	BOND ISSUE 2020 \$6,570,000

ORG	ORG/PER	ACCOUNT	ACCOUNT DESCRIPTION	Description	ORIGINAL APPROP	TRANFRS/ADJSMTS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCE	AVAILABLE BUDGET	VENDOR NAME	COMMENT
00150052	00150052	17 -00-15-0052-5715	IMPROVEMENTS TO BUILDINGS	Acoustics	245,000	0	245,000	2,150.00	4,350.00	238,500.00		
2021/04/0001	10/07/2020	API				250798		2,150.00			COTE ACOUSTICAL CONS	SERVICE - PROJECT ACOUSTIC
00150053	00150053	17 -00-15-0053-5715	IMPROVEMENTS TO BUILDINGS	Contingency	478,392	-157,458	320,934	0.00	0.00	320,933.88		
			<b>Total Bond Projects</b>		<b>6,570,000</b>	<b>-728</b>	<b>6,569,272</b>	<b>3,765,028</b>	<b>1,918,977.27</b>	<b>885,266.60</b>		

**Personnel – Certified**

**Code of Professional Responsibility**

Certified staff are expected to demonstrate knowledge of the Connecticut Code of Professional Responsibility for Teachers. ~~Some~~ Certified staff are also bound to the Code of Ethics in their respective areas of discipline.

Reference: Connecticut Code of Professional Responsibility for Teachers

**Personnel – Certified**

**Code of Professional Responsibility**

~~Policy adopted:~~

## **Personnel – Certified/Non-Certified**

### **Staff/Student Non-Fraternization**

Staff members shall maintain professional relationships with students which are conducive to an effective educational environment. Staff members shall not have any interaction of a sexual nature with any student at any time regardless of the student's age, status or consent.

(cf. 4118.112/4218.112 – Sexual Harassment)

(cf. 4118.23/4218.23 – Conduct)

(cf. 5141.4 – Child Abuse/Neglect)

Legal Reference: Connecticut General Statutes

10-53a-71 Sexual assault in the second degree: Class C or B felony.

10-151 Employment of teachers. Definitions. Notice and hearing on failure to renew or termination of contract. Appeal

Policy adopted: April 10, 2006

AMITY REGIONAL SCHOOL DISTRICT NO. 5  
Woodbridge, Connecticut

## Personnel – Certified/Non-Certified

### Staff/Student Non-Fraternization

The Amity Regional School District No. 5 (ARSD) Board of Education (Board) requires all employees to conduct themselves in a manner which will maintain the authority and respect necessary in the educational setting. Staff members shall maintain professional relationships with students, which are conducive to an effective educational environment. Any action or comment by a member of the school staff which involves romantic or sexual involvement with a student is considered to be highly unethical and is unacceptable to the Board. It is the policy of the Board to prohibit any sexual relationship, contact, or sexually nuanced behavior or communication (verbal or non-verbal) between a staff member and a student while the student is enrolled in ARSD. The prohibition extends to students of the opposite sex or the same sex as the staff member and applies regardless of whether the student or the staff member is the initiator of the behavior and whether or not the student welcomes or reciprocates the attention.

It is the responsibility of the Principal of each school to emphasize the requirements of this policy and to provide appropriate follow-up on any complaint or evidence of failure to follow the policy and related regulations.

(cf. 5145.5/4118.112/4218.112 - Sexual Harassment)

(cf. 5141.4 - Child Abuse/Neglect)

Legal Reference: Connecticut General Statutes  
 10-53a-71 Sexual assault in the second degree: Class C or B felony.  
 10-151 Employment of teachers. Definitions. Notice and hearing on failure to renew or termination of contract. Appeal  
 PA 15-205 An Act Protecting School Children  
 17a-106 Cooperation in relation to prevention, identification, and treatment of child abuse/neglect  
 Elementary and Secondary Education Act (ESEA), as amended ESSA, 20 U.S.C. 7926(a); Prohibition on aiding and abetting sexual abuse (aka "don't pass the trash")

## **Personnel – Certified/Non-Certified**

### **Use of Social Media by Employees**

Public employees are public servants and are entrusted with the public trust. Because of this public trust The Amity Regional School District No. 5 (ARSD) Board of Education (Board) personnel are held to a higher standard of professionalism than private citizens. Board personnel must work hard to gain and maintain the trust and confidence of the community. Employees must give thoughtful consideration to their actions to avoid damaging the reputation and trust the Board has with the community.

The Board recognizes the importance and utility of social media for its employees, while also recognizing that misuse of social media may cause harm. Social media includes, but is not limited to, social networking sites or applications such as Twitter, Instagram, Facebook, LinkedIn, YouTube, and Snapchat. The policy applies to all expressive activity on social media platforms such as liking, commenting on, or sharing the post of another individual or entity.

ARSD strongly encourages all staff members to carefully review the privacy settings on social networking sites they use and exercise care and good judgement when posting content and information on such sites. Ordinarily, the use of social media by employees, including employees' personal use of social media, will not be a legal or policy issue. While a policy cannot address every instance of inappropriate social media use employees must refrain from social media use that: 1) interferes, disrupts, or undermines the effective operation of ARSD; 2) is used to engage in harassing, defamatory, obscene, discriminatory or threatening, or similarly inappropriate communications; 3) creates a hostile work or educational environment; 4) breaches ARSD's confidentiality obligations; 5) harms the goodwill and reputation of ARSD in the community; or 6) violates the law, board policies, and/or other school rules and regulations. The Board, through its Superintendent, will adopt and maintain administrative regulations to implement this policy.

The effectiveness of the Board depends importantly on the respect and trust of the community and on the perception in the community that it acts fairly, even-handedly, and without bias. The Board may take action with respect to social media activity to prevent disruption to its operations. The Board may also act, if the speech substantially or materially interferes with the employee's bona fide job performance or the working relationship between the employee and the employer.

The laws regarding social media continue to evolve and change. Nothing in this policy is intended to limit an employee's right to use social media under applicable law, as it may evolve. The Board acknowledges, for example, that its employees have the right under the First Amendment, in certain circumstances, to speak out on matters of public concern. Likewise, employees have rights to engage in concerted activities for their mutual aid and protection. The Board will resolve any conflict between this policy and applicable law in favor of the law.

(c.f. 4118.24 – Staff/Student Relations)

(c.f. 4118.5 – Acceptable Computer Network Use)

**Personnel – Certified/Non-Certified**

**Use of Social Media by Employees**

(c.f. 5131.911 – Bullying and Teen Dating Violence)

Legal References: Connecticut General Statutes

The Freedom of Information Act

[53A](#)-182B Harassment in the first degree.

[31](#)-48d Employees engaged in electronic monitoring required to give prior notice to employees. Exceptions. Civil penalty.

United States Code, Title 20

675 1-6777 Enhancing Education Through Technology Act, Title II, Part D, especially: 6777 Internet safety

United States Code, Title 47

254 Universal service discounts (E-rate)

Code of Federal Regulations, Title 47

54.520 Internet safety policy and technology protection measures, E-rate discounts

U.S. Constitution, 1st Amendment

Connecticut Constitution, Article 1, Sections 3, 4, 14

**Policy adopted:**

Amity Regional School District No. 5  
WOODBRIDGE, CT

## Personnel – Certified

### Evaluation and Support Program

The Amity Regional School District No. 5 (ARSD) Board of Education (Board) believes that good teaching is the most important element in a sound educational program. Student learning is directly affected by teacher competence; therefore, teacher evaluation shall be accomplished using a teacher evaluation plan, which demonstrates a clear link between teacher evaluation, professional development, and improved student learning.

The submission of ARSD's evaluation plans for SDE review and approval, including flexibility requests, shall take place no later than the annual deadline set by the Connecticut State Department of Education (CSDE).

"Teacher" or "Administrator" for purposes of evaluation shall include each professional employee of the Board, below the rank of Superintendent, who holds a certificate or permit issued by the State Board of Education.

Appraisal of teaching performance should serve three purposes:

1. To raise the quality of instruction and educational services to the children of our community resulting in improved student learning.
2. To raise the standards of the teaching profession as a whole.
3. To aid the individual teacher to grow professionally, linking district-wide teacher evaluation and professional development plans.

Evaluation of teacher performance must be a cooperative, continuing process designed to improve student learning and the quality of instruction. The Superintendent shall annually evaluate or cause to be evaluated all certified employees in accordance with the teacher evaluation and support program, developed through mutual agreement with the Professional Development and Evaluation Committee (PDEC) for ARSD. The PDEC members share the responsibility for developing effective evaluation procedures and instruments and for the development and maintenance of professional standards and attitudes regarding the evaluation process. The required union representation on such committee shall include at least one representative from each of the teachers' and administrators' unions.

The Board shall adopt and implement a teacher evaluation and support program. Such teacher evaluation and support program shall be developed through mutual agreement with the PDEC. If unable to attain mutual agreement, the Board and the PDEC shall consider adopting by mutual agreement the State Board of Education (SBE) adopted model teacher evaluation and support program without any modification. Further, if the Board and the PDEC fail to agree on the SBE model, the Board will use its statutory authority to adopt and implement a teacher evaluation program of its choice provided such program is consistent with the SBE adopted guidelines.

The system-wide program for evaluating the instructional process and all certified personnel is viewed as one means to improve student learning and insure the quality of instruction. The evaluation plan shall include, but need not be limited to, strengths, areas needing

Approved:

AMITY REGIONAL SCHOOL DISTRICT NO. 5

Woodbridge, CT  
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## **Personnel – Certified**

### **Evaluation and Support Program**

improvement, strategies for improvement, and multiple indicators of student academic growth. Further, claims of failure to follow the established procedures of such teacher evaluation and support program shall be subject to the grievance procedure in collective bargaining agreements negotiated subsequent to July 1, 2004.

The Superintendent and all employees whose administrative and supervisory duties equal at least 50% of their time shall include a minimum of fifteen hours of training in the evaluation of teachers, pursuant to Section 10-151b, as part of the required professional development activity during each five-year period for reissuance of their professional educator certificate.

The Superintendent shall annually evaluate or cause to be evaluated each teacher and administrator in accordance with the teacher evaluation and support program and may conduct additional formative evaluations toward producing an annual summative evaluation.

In the event that a teacher or an administrator does not receive a summative evaluation during the school year, such individual shall receive a rating of "not rated" for that year.

By dates determined by the CSDE, the Superintendent shall report to the Commissioner of Education on the implementation of the teacher evaluation and support program and other requirements as determined by the State Department of Education.

### **Improvement and Remediation Plans**

The PDEC will develop as part of the teacher evaluation and support program a process for teacher improvement and remediation that:

1. Is differentiated by the level of identified need and/or stage of development;
2. Identifies resources, support, and other strategies to be provided to address documented deficiencies;
3. Contains a timeline for implementing such measures;
4. Provides success indicators; and
5. Is developed in consultation with the teacher and his/her union representative.

### **Evaluation Training**

The Superintendent or his/her designee, prior to any evaluation conducted under the teacher evaluation and support program, shall conduct training programs for all evaluators and orientation for all ARSD teachers regarding the ARSD's teacher evaluation and support program. Such training shall provide instruction to evaluators regarding how to conduct proper performance evaluations prior to conducting an evaluation under the teacher evaluation and support program. The orientation for each teacher shall be completed before a teacher receives an evaluation under the teacher evaluation and support program.

## **Personnel – Certified**

### **Evaluation and Support Program**

#### **Implementation Plan**

The Board recognizes that the State Board of Education (SBE) utilizes a flexible plan for the implementation of Connecticut's Educator Evaluation and Support System.

The submission of the ARSD's evaluation plans for the CSDE's review and approval, including flexibility requests, shall take place by annual deadlines set by the Connecticut State Department of Education.

#### **Complementary Observers**

The primary evaluator for most teachers will be the school principal or assistant principal who will be responsible for the overall evaluation process, including assigning summative ratings. ARSD may also decide to use complementary observers to assist the primary evaluator. Complementary observers are certified educators who may have specific content knowledge, such as department heads or curriculum coordinators. Complementary observers shall be fully trained as evaluators in order to be authorized to serve in this role.

Primary evaluators will have sole responsibility for assigning final summative ratings. Both primary evaluators and complementary observers must demonstrate proficiency in conducting standards-based observations.

#### **Dispute Resolution Process**

In accordance with the requirement in the "Connecticut Guidelines for Teacher Evaluation and Professional Development" in establishing or amending the local teacher evaluation plan, the Board shall include a process for resolving disputes in cases where the evaluator and teacher cannot agree on goals/objectives, the evaluation period, feedback, or the professional development plan.

When such agreement cannot be reached the issue in dispute may be referred for resolution to a sub-committee of the Professional Development and Evaluation Committee (PDEC). Per the ARSD Teacher Evaluation and Support Plan this sub-committee shall be comprised of the Director of Curriculum and Staff Development, President of the Amity Education Association (AEA) or designee, and two neutral people mutually selected by the Director of Curriculum and Staff Development and the President of the AEA. In the event the designated sub-committee does not reach a unanimous decision, the issue shall be considered by the Superintendent whose decision shall be binding. This provision is to be utilized in accordance with the specified processes and parameters regarding goals/objectives, evaluation period, feedback, and professional development contained in the document entitled "Connecticut Guidelines for Educator Evaluation."

## Personnel – Certified

### Evaluation and Support Program

#### Data Management

Annually ARSD's Professional Development and Evaluation Committee will review the user experiences and efficiency of the District's data management system/platform to be used by teachers and administrators to manage the evaluation plans.

#### Audit

The Board, if selected, will participate as required in an audit of its evaluation program conducted by the State Department of Education.

All teachers teaching in public schools at the elementary, middle, and high school levels (including special education teachers) must be determined to be an "effective educator," as defined in the Every Student Succeeds Act. To be determined an "effective educator" a teacher must meet state certification and licensure criteria.

The reauthorized Individuals with Disabilities Act (IDEA) identifies special education teachers as teachers who must demonstrate competency in the core academic subjects that they teach.

ARSD evaluates a teacher's subject-matter competency in the core academic content areas based on the Common Core of Teaching (CCT) using both of the following:

- A. foundational skills and competencies; and
- B. the discipline-based professional standards.

(cf. 4111 - Recruitment and Selection)

Legal Reference: Connecticut General Statutes  
10-145b Teaching certificates.  
10-151a Access of teacher to supervisory records and reports in personnel file.  
10-151b Evaluation by superintendent of certain educational personnel. (amended by PA 04-137, P.A. 10-111, P.A. 12-116, PA 12-2 (June Special Session), PA 13-245, PA 15-5 (June Special Session)  
10-151c Records of teacher performance and evaluation not public records.  
10-220a(b) In-service training. Professional development. Institutes for educators. Cooperative and beginning teacher programs, regulations.  
PA 11-135 An Act Concerning Implementation Dates for Secondary School Reform.

Approved:

AMITY REGIONAL SCHOOL DISTRICT NO. 5

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**Personnel – Certified**

**Evaluation and Support Program**

PA 12-116 An Act Concerning Education Reform (as amended by PA 13-145 An Act Concerning Revisions to the Reform Act of 2012.)  
Connecticut Guidelines for Educator Evaluation, adopted by the State Board of Education, June 27, 2012.  
Connecticut's System for Educator Evaluation and Development (SEED) state model evaluation system.  
"Flexibility to Guidelines for Educator Evaluation" adopted by Connecticut State Board of Education, February 6, 2014  
34 C.F.R. 200.55 Federal Regulations.  
PL 114-95 Every Student Succeeds Act, §9213

## **Personnel – Certified**

### **Administrative Leave/Non-Renewal/Suspension**

#### **Non-Renewal – Non-tenured Teachers**

The contract for employment of a teacher who has not attained tenure may be terminated at any time for any of the reasons enumerated below:

- a. Inefficiency, incompetence, or ineffectiveness;
- b. Insubordination against reasonable rules of the Board of Education (Board);
- c. Moral misconduct;
- d. Disability as shown by competent medical evidence;
- e. Elimination of the position to which the teacher was appointed or loss of a position to another teacher in accordance with C.G.S 10—151(d)(5); or
- f. Other due and sufficient cause.

A teacher shall be deemed ineffective, if said teacher is rated with a holistic summative evaluation score of 0.0 to 2.0 for that specific academic year. Otherwise, the contract of such teacher shall be continued into the next school year, unless such teacher receives a written notice by May 1st in one school year that such contract will not be renewed for the following year.

Prior to obtaining tenure a certified employee's contract may be non-renewed, provided that the employee is notified in writing prior to May 1st by the Superintendent. A teacher so notified may request, no later than three (3) calendar days after such teacher receives such notice of non-renewal, a written statement of the reasons for non-renewal of the contract; and Amity Regional School District No. 5 (ARSD) will furnish such a statement no later than four (4) calendar days of the receipt of the request. The teacher may also file with the Board no later than ten (10) calendar days of receipt of the notice of non-renewal for a hearing before the Board or, if indicated in such request designated by the Board, before a single impartial hearing officer chosen by the teacher and the Superintendent. The hearing shall commence no later than fifteen (15) calendar days after receipt of such request, unless an extension not to exceed fifteen (15) calendar days is mutually agreed upon.

A teacher who has not attained tenure shall not be entitled to a hearing concerning non-renewal, if the reason for such non-renewal is either elimination of position or loss of position to another teacher. The Board shall rescind a non-renewal decision, only if the Board finds such decision to be arbitrary and capricious.

## Personnel – Certified

### Administrative Leave/Non-Renewal/Suspension

#### Non-Renewal – Tenured Teachers

The contract of employment of a teacher who has attained tenure shall be continued from school year to school year, except that it may be terminated at any time for one or more of the following reasons:

- a. Inefficiency, incompetence, or ineffectiveness;
- b. Insubordination against reasonable rules of the Board of Education;
- c. Moral misconduct;
- d. Disability, as shown by competent medical evidence;
- e. Elimination of the position to which the teacher was appointed or loss of a position to another teacher, in accordance with C.G.S 10—151(d)(5); or
- f. Other due and sufficient cause.

A tenured teacher shall in general be deemed ineffective if said teacher is rated with a holistic summative evaluation score of 0.0 to 2.0 for that specific academic year.

#### Suspension

A certified employee may be suspended by the Board for an alleged or actual violation of any of the reasons for termination in C.G.S. 10-151(c) or 10-151(d) when insufficient cause for dismissal is considered to exist or may be suspended pending Board or legal action for dismissal of the employee on charges of violation of one or more of said causes for termination. The Superintendent may suspend an employee pending Board action when, in the opinion of the Superintendent, continuation of the employee in the position presents a clear danger to the students, staff, property, or reputation of ARSD or to the employee.

Legal Reference: Connecticut General Statutes  
[10-151\(b\)](#) Employment of teachers. Definitions. Tenure, etc. (as amended by P.A. [12-116](#), An Act Concerning Educational Reform)  
[10-151\(c\)](#) Employment of teachers. (as amended by P.A. [11-136](#), An Act Concerning Minor Revisions to the Education Statutes.)  
 PA 95-58 An Act Concerning Teacher Evaluations, Tenure and Dismissal.  
 PA 97-247 An Act Concerning Revisions to the Education Statutes.  
 Connecticut Guidelines for Educator Evaluation adopted by the State Board of Education, June 27, 2012  
 Connecticut’s System for Educator Evaluation and Development (SEED)  
 Shanbrom v. Orange Board of Education, 2 Conn. L. Rpts. 396, 398 (1990)  
 Americans with Disabilities Act

## **Personnel – Certified/Non-Certified**

### **Suspension**

It is the policy of the Amity Regional School District No, 5 (ARSD) Board of Education (Board) to use due process and comply with relevant portions of the collective bargaining agreement when disciplining and/or dismissing employees.

### **Progressive Discipline**

Staff members will be disciplined according to the severity and frequency of the conduct at issue. Discipline may be in the form of verbal reprimand, written reprimand, plan of assistance, or suspension depending on the circumstances of each case.

1. **Verbal Reprimand:** The administrator will hold a conference with the employee. He/she will outline the nature of the problem and listen to any comments from the employee. The administrator will indicate that compliance with specified procedures or cessation of certain conduct is required and future consequences, if directives are ignored.
2. **Written Reprimand:** The administrator will hold a conference with the employee. The employee may have a representative present. The administrator will outline the nature of the problem and listen to any comments from the employee or his/her representative. The administrator will indicate that compliance with specified procedures or cessation of certain conduct is required and future consequences, if directives are ignored. A "letter of reprimand" shall be written and placed in the employee's personnel file pursuant to provisions in Board policy or the collective bargaining agreement. Legal counsel is to be attained prior to the issuance of any written reprimand.
3. **Plan of Assistance:** Performance deficiencies may require a written plan of assistance to aid improvement. The plan of assistance will incorporate the following elements:
  - a. A written description of the problem or problems to be corrected;
  - b. The method or methods which will be used to correct the problem;
  - c. The length of time during which improvement or correction must occur; and
  - d. Frequency and type of supervision to be provided.

The administrator will hold a conference with the employee to discuss the plan. The employee may have a representative present. The administrator will explain the plan of assistance and listen to any comments from the employee or his/her representative. The plan of assistance will be implemented as written or modified and implemented as modified.

## **Personnel – Certified/Non-Certified**

### **Suspension**

#### **Suspension without Pay**

Employees may be suspended without pay as a disciplinary measure for misconduct detrimental to ARSD. Before invoking a suspension without pay the Superintendent will conduct a hearing to determine whether the facts warrant such a suspension. The employee may have a representative present at the hearing.

Following are examples of actions that are considered misconduct. This list is representative only and not to be considered inclusive:

- possessing, using, manufacturing, distributing, or dispensing any illegal drugs or alcohol while on duty on or off ARSD property;
- interfering with other employees in the discharge of their duties;
- fighting or deliberately harming another;
- disregard for the safety of a fellow employee or student;
- being absent without approval;
- refusing to follow a supervisor's instructions and directions (insubordination);
- destroying school property intentionally;
- using obscene language which is unsuitable in the school setting;
- possessing weapons on school property without proper authorization; and
- behaving in any inappropriate manner to the extent of adversely affecting the employee's ability to perform his/her work.

#### **Suspension with Pay**

The Board authorizes the Superintendent to suspend an employee with pay during an investigation into allegations of disobedience or misconduct whenever the employee's continued presence in his or her position would not be in the best interests of ARSD or pending a hearing to suspend a teacher without pay. The Superintendent shall meet with the teacher to present the allegations and give the teacher an opportunity to refute the charges. The teacher will be told the dates and times the suspension will begin and the conditions under which it will end.

The requirement of policy 5141.4 pertaining to allegations of child abuse by a school employee will be followed as it relates to suspension.

An employee may be suspended pending the outcome of a dismissal hearing.

(cf. 5141.4 - Reporting of Child Abuse, Neglect and Sexual Assault)

Policy adopted:

AMITY REGIONAL SCHOOL DISTRICT NO. 5  
Woodbridge, CT

## **Personnel – Certified/Non-Certified**

### **Non-discrimination/Equal Employment Opportunity**

#### **Non-discrimination**

In compliance with regulations of Title VII of the Civil Rights Act 1964, Title IX of the Education Amendments of 1972 as amended, Section 504 of the Rehabilitation Act of 1973, the Civil Rights Act of 1987, and the American With Disabilities Act, the Amity Regional School District No. 5 (ARSD) Board of Education (Board) adopts the following Equal Employment Opportunity and Equal Education Opportunity Policies.

#### **Equal Employment Opportunity**

Both federal and state law prohibits discriminatory practices in hiring and employment. The Board prohibits discriminatory acts in all ARSD matters dealing with employees and applicants for positions and requires equal employment opportunities for all employees and applicants. As an equal opportunity employer, ARSD Board does not discriminate on the basis of race, color, religious creed, age, marital status, national origin, ancestry, sex, sexual orientation, genetic information, gender identity or expression, disability (including pregnancy), status as a Veteran, or any classification protected by state or federal law regarding any individual who can perform the essential functions of the job with or without reasonable accommodations physical disability (including blindness) or other disability (except in the case of a bona fide occupational qualification or need).

#### **Sexual Harassment and Other Forms of Harassment**

Sexual harassment or any other form of harassment based on protected class status (including but not limited to race sex, color, national origin, religion, or disability) will not be tolerated in ARSD. The Board strictly forbids any form of harassment by students, personnel, individuals under contract, or volunteers subject to the control of the Board. Employees who engage in harassment will be subject to discipline, up to and including termination of employment.

#### **Sexual Harassment**

Sexual harassment is defined as unwelcome conduct of a sexual nature, whether verbal or physical, including but not limited to: advances or requests for sexual favors; insulting or degrading sexual remarks or conduct; or threats or suggestions that an employee's submission to or rejection of such conduct is made either explicitly or implicitly a term or condition of an individual's employment, is used as the basis for employment decisions affecting such individual, or such conduct has the purpose or effect of substantially interfering with an individual's work performance or creating an intimidating, hostile, or offensive working environment. Examples of sexual harassment include but are not limited to:

1. Pressure for sexual activity.
2. Repeated remarks with sexual or sexually demeaning implications.
3. Unwelcome or inappropriate touching.

## **Personnel – Certified/Non-Certified**

### **Non-discrimination/Equal Employment Opportunity**

4. Suggesting or demanding sexual involvement accompanied by implied or explicit threats concerning an individual's employment status, benefits, duties or work assignments.

### **Harassment Based On Other Protected Class Status**

For purposes of this policy harassment of an employee based on protected class status other than sexual harassment consists of verbal or physical conduct when the harassing conduct is so severe, persistent, or pervasive that it affects an employee's ability to work or creates an intimidating, threatening, or abusive work environment; the harassing conduct has the purpose or effect of substantially or unreasonably interfering with an individual's work; or the harassing conduct otherwise adversely affects an individual's work performance.

### **Title IX, Title VI and Section 504 Coordinators**

Questions, complaints, and other matters concerning harassment will normally be handled by ARSD's Title IX, Title VI, and Section 504 Coordinators. The names and contact information for these individuals (Non-discrimination Coordinators) will be posted annually on the ARSD website. The Director of Pupil Personnel Services shall be responsible for identifying these individuals annually. Questions, complaints, and other matters including but not limited to investigations may be referred directly to The Director of Pupil Personnel Services.

### **Complaint Procedure**

Employees who believe they have been victims of sexual or other forms of harassment are encouraged to promptly report such claims. Complaints will be investigated, and corrective action will be taken as appropriate. Confidentiality, both of the complainant and the accused, will be respected by all persons involved consistent with the Board's legal obligations and the necessity to investigate the allegations. Reprisals or retaliation as a result of the reporting of charges of harassment will not be tolerated. Reporting claims of harassment will not affect an individual's employment status, benefits, duties, or work assignments.

An employee who believes that he/she has been subjected to behavior that could constitute sexual or other forms of harassment should whenever possible immediately inform the alleged harasser that his/her behavior is unwelcome and unacceptable and that such behavior must stop immediately. It is recognized, however, that the responsibility for ending the harassment rests with the harasser, not the victim. If it is not possible for the employee subjected to such behavior to immediately inform the alleged harasser that the alleged conduct is unwelcome and unacceptable, then the matter should be reported to the designated Non-discrimination Coordinators; and ARSD may take immediate steps at its discretion to protect the complainant, reporter, students, or others pending completion of an investigation.

Employees who believe they have been subjected to sexual or other forms of harassment may request an informal meeting with their immediate supervisor, unless the supervisor is the alleged

## **Personnel – Certified/Non-Certified**

### **Non-discrimination/Equal Employment Opportunity**

harasser. In that event the employee may request a meeting with the appropriate supervisor in the next level of management. The purpose of such a meeting will be to discuss the allegations and appropriate remedial action. The supervisor will provide a written report of the incident including the remedial action to be taken to the designated Non-discrimination Coordinators or other appropriate administrator.

If the complaint is not resolved through the informal meeting described above, the supervisor will encourage the employee to file a written complaint with the Director of Pupil Personnel Services on the form provided for this purpose. If the Director of Pupil Personnel Services is the alleged harasser, the complaint should be forwarded directly to the Superintendent or his/her designee. Normally, complaints should be made immediately or as soon after the act of harassment as possible. The complaint should state the name of the complainant and the date of the complaint, the date of the alleged harassment, the name or names of the harasser or harassers, where such harassment occurred, and a statement of the circumstances constituting the alleged harassment.

Any employee who makes an oral complaint of harassment will be provided a copy of this policy and a complaint form and will be encouraged to submit a written complaint. Failure to provide a written complaint will not, however, preclude investigation and attempted remediation, if necessary, of the complaint. All complaints are to be forwarded immediately to the designated Non-discrimination Coordinator unless that individual is the alleged harasser, in which case the complaint should be forwarded directly to the Superintendent or his/her designee.

### **Investigation**

As soon as possible after the receipt of a complaint the designated Non-discrimination Coordinator or other personnel as appropriate shall commence an investigation. The investigation should normally include consultation with all individuals reasonably believed to have relevant information including the complainant; the alleged harasser or harassers, any witnesses to the conduct, and any victims of similar conduct if known.

The investigation shall be carried on discreetly, maintaining confidentiality insofar as possible while still conducting an effective and thorough investigation. Throughout the entire investigative process the due process rights of the alleged harasser will be upheld.

At the conclusion of the investigation the investigator shall provide a written report to the Superintendent or other appropriate personnel summarizing the results of the investigation and recommended disposition of the matter. If there is reasonable cause to believe that sexual or another form of harassment has occurred, the Superintendent or his/her designee shall take all reasonable steps to ensure that the harassment ceases and will not reoccur up to and including termination of the employment of the harasser or harassers.

## **Personnel – Certified/Non-Certified**

### **Non-discrimination/Equal Employment Opportunity**

If the complainant is not satisfied with the resolution of his/her complaint, he/she can appeal to the Board. The appeal must include a copy of the original complaint, the specific action or inaction being appealed, and a proposed resolution.

Following a finding of harassment victims may be periodically interviewed by the appropriate supervisor as necessary to ensure that the harassment has not reoccurred and that no retaliation has occurred. Such review will continue for a period of time deemed appropriate by the Non-discrimination Coordinator and/or the Superintendent.

### **Posting and Training**

A copy of this policy should be provided to all employees upon hire. The Board shall post in a prominent and accessible location in each school building information concerning the illegality of sexual or other forms of harassment and remedies available to victims of harassment. The Board shall provide training and education to all new supervisory employees within six months of their assumption of a supervisory position. Such training shall include information concerning the federal and state statutory provisions concerning sexual harassment and remedies available to victims of sexual harassment.

### **Alternate Complaint Procedures**

In addition to filing a harassment complaint through the procedures set forth in this policy, an employee may choose to exercise other options including but not limited to filing a complaint with an outside agency or filing a private lawsuit. A charge of harassment may be investigated by the Connecticut Commission on Human Rights and Opportunities, 90 Washington Street, Hartford, Connecticut 06106 (telephone number 566-3350; TDD number 566-2301). Connecticut law requires that a formal written complaint be filed with the Commission within 180 days of the date when the alleged harassment occurred.

(cf. 5145.5/4118.112 - Prohibition Against Sexual Harassment)

Legal Reference: Connecticut General Statutes

10-153 Discrimination on account of marital status.

46a-51 Definitions

46a-58 Deprivation of rights. Desecration of property. Placing of burning cross or noose on property. Penalty. (as amended by PA 17-127)

46a-60 Discriminatory employment practices prohibited.

P.A. 11-55 An Act Concerning Discrimination

Federal Law

Title VII of the Civil Rights Act 1964

**Personnel – Certified/Non-Certified**

**Non-discrimination/Equal Employment Opportunity**

Section 504 and the Federal Vocational Rehabilitation Act of 1973, 20 U.S.C. 706(7)(b).

American Disability Act of 1989, as amended by the ADA Amendments Act of 2008

Chalk v. The United States District Court of Central California.

Title IX of the Education Amendments of 1972.

Civil Rights Act of 1987.

Title IX Final Rule, May 6, 2020

The Vietnam's Era Veterans' Readjustment Assistance Act of 1974, as amended, 38 U.S.C. §4212

Title II of the Genetic Information Nondiscrimination Act of 2008