PLEASE POST PLEASE POST

### AMITY REGIONAL SCHOOL DISTRICT NO. 5

Bethany Orange Woodbridge 25 Newton Road, Woodbridge, Connecticut 06525

Dr. Jennifer P. Byars Superintendent of Schools

## AMITY REGIONAL BOARD OF EDUCATION REGULAR MEETING AGENDA Monday, November 8, 2021, 6:30 pm 25 Newton Road, Woodbridge, CT

The Amity Board of Education is conducting all Board and committee meetings in person unless designated on the agenda. In-person public comment may be made at the meeting location at the point so designated in the agenda. Per Governor's Executive Orders 13A and 14, all attendees must wear a mask while inside a school building. Comments submitted in writing will be forwarded to the Board of Education or Board Committee as Correspondence.

- 1. CALL TO ORDER
- 2. PLEDGE OF ALLEGIANCE
- 3. APPROVAL OF MINUTES
  - a. Regular Board of Education Meeting October 18, 2021 Page 3
  - b. Special Board of Education Meeting November 1, 2021 Page 9
- 4. STUDENT REPORT
  - a. Monthly Report
- 5. RECOGNITION OF AMITY REGIONAL HIGH SCHOOL NATIONAL MERIT SCHOLAR SEMI-FINALISTS Page 10
- 6. RECOGNITION OF CIAC/NATIONAL UNIFIED SPORTS PROGRAM AT AMITY REGIONAL HIGH SCHOOL
- 7. PRESENTATION AND DISCUSSION OF THIRD QUARTER 2021 EXECUTIVE SUMMARY REVIEW OF AMITY PENSION FUND, SICK AND SEVERANCE ACCOUNT, AND OPEB *Page 11*
- 8. PUBLIC COMMENT
- 9. DISCUSSION AND POSSIBLE ACTION ON 2022 BOARD OF EDUCATION REGULAR MEETING SCHEDULE Page 105
- 10. PRESENTATION OF 2022-2023 SCHOOL CALENDAR Page 106
- 11. SUPERINTENDENT'S REPORT
  - a. Personnel Report *Page 107*
  - b. Superintendent Report *Page 110*
- 12. DISCUSSION AND POSSIBLE ACTION ON PROVIDING ON-SITE COVID-19 TESTING WHEN REQUIRED FOR A SCHOOL-SPONSORED ACTIVITY OR EVENT
- 13. CORRESPONDENCE
- 14. CHAIRMAN'S REPORT
  - a. Committee Reports
    - 1. ACES
    - 2. Ad Hoc School Safety
    - CABE
    - 4. Curriculum
    - 5. District Health and Safety
    - 6. District Technology *Page 117* 
      - a. Monthly Reports

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- 7. Facilities *Page 119* 
  - a. Monthly Reports
- 8. Finance
  - a. Discussion of Monthly Financial Statements *Page 125*
  - b. Director of Finance and Administration Approved Transfers Under\$3,000 *Page 154*
  - c. Discussion and Possible Action on Transfers over \$3,000 Page 155
  - d. Other
    - 1. Bond Projects YTD Budget report Page 156
- 9. Policy
  - a. First Read
    - 1. Policy 4134 Tutoring *Page 158*
    - 2. Policy 4135 Organizations/Units *Page 160*
    - Policy 4140.2/4240.2 Compensation and Related Benefits for Non-Bargaining Unit Employees (Excluding Superintendent and Directors) Page 163
    - 4. Policy 5145.53 Transgender and Gender Non-Conforming Youth *Page 164*
    - 5. Bylaw 9321 Time, Place, Notification of Meetings *Page 170*
  - b. Second Read
    - 1. Policy 1110.1 Parental Involvement *Page 174*
    - 2. Policy 3542.43 Food Service Charging Policy *Page 176*
    - 3. Policy 4131 Staff Development *Page 180*
    - 4. Policy 4133 Travel Reimbursement *Page 185*
    - 5. Policy 5112 Ages of Attendance *Page 186*
    - 6. Policy 5113.2 Attendance *Page 188*
    - 7. Policy 5131.911 Bullying and Teen Dating Violence *Page 195*
    - 8. Policy 5141 Student Health Services *Page 213*
    - 9. Policy 5142.4 School Resource Officer *Page 220*
- 10. Personnel
- 15. NEW BUSINESS
- **16. ITEMS FOR THE NEXT AGENDA** Due to Chairperson by November 30, 2021
- 17. ADJOURNMENT

Jennifer P. Byars, Ed.D Superintendent of Schools

LmiferP. Byous

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.

#### **BOARD MEMBERS PRESENT**

John Belfonti, Christopher Browe, Shannan Carlson, Paul Davis, Steven DeMaio, Carla Eichler, Andrea Hubbard, Dr. Carol Oladele, Patrick Reed, Dr. K. Sudhir, Dr. Jennifer Turner, Donna Schuster (remote, exited 8:53 p.m.)

#### **BOARD MEMBERS ABSENT**

George Howard

#### STUDENT REPRESENTATIVES PRESENT

Marin Korenaga

#### STAFF MEMBERS PRESENT

Dr. Jennifer Byars, Theresa Lumas, Thomas Brant, Kathy Burke, Peter Downhour, Kathleen Kovalik, Jill LaPlante, Anna Mahon, Stephen Martoni, Dr. Marie McPadden, Joseph Robinson, Dr. Jason Tracy

#### 1. CALL TO ORDER

Chairperson Belfonti called the meeting to order at 6:30 p.m.

### 2. PLEDGE OF ALLEGIANCE

Recited by those present

### 3. APPROVAL OF MINUTES

a. Regular Board of Education Meeting - September 13, 2021

MOTION by Shannan Carlson, SECOND by Patrick Reed, to approve minutes as submitted VOTES IN FAVOR, 12 (unanimous)
MOTION CARRIED

### 4. <u>STUDENT REPORT</u>

a. Monthly Report

### 5. PUBLIC COMMENT

15 residents and 1 parent spoke about masks and vaccinations.

2 residents and 1 parent spoke about discrimination.

1 student and 1 parent spoke about the Day of Dialogue.

1 resident spoke about gender.

MOTION by Steven DeMaio, SECOND by Christopher Browe, to add an agenda item for Discussion and Possible Action on Options for COVID testing of Students Prior to the Homecoming Dance at No Cost VOTES IN FAVOR, 12 (unanimous)

MOTION CARRIED

MOTION by Steven DeMaio, SECOND by Shannan Carlson, to request administration to research options for COVID testing of students prior to the Homecoming Dance at no cost VOTES IN FAVOR, 12 (unanimous)

MOTION CARRIED

MOTION by Christopher Browe, SECOND by Carla Eichler, to recess meeting VOTES IN FAVOR, 12 (unanimous)
MOTION CARRIED

Meeting recessed at 8:15 p.m.

Meeting resumed by Chairperson Belfonti at 8:25 p.m.

MOTION BY Steven DeMaio, SECOND by Christopher Browe, to amend agenda to address only the following remaining items:

- Discussion and Possible Action on Setting 2022 Graduation Date
- Correspondence
- Chairman's Report Committee Reports
  - o CABE
  - Finance
  - Personnel
- New Business
- Items for the Next Agenda
- Adjournment

VOTES IN FAVOR, 12 (unanimous) MOTION CARRIED

#### 6. DISCUSSION AND POSSIBLE ACTION ON SETTING 2022 GRADUATION DATE

MOTION by Christopher Browe, SECOND by Dr. Turner, to approve June 10, 2022 as Graduation Date VOTES IN FAVOR, 12 (unanimous)
MOTION CARRIED

#### 7. CORRESPONDENCE

Summarized by Carla Eichler

#### 8. CHAIRMAN'S REPORT

- a. Committee Reports
  - 1. CABE
  - 2. Finance
    - a. October 1 Enrollment
    - b. Award of Contracts over \$35,000
      - 1. Acoustic Panels

MOTION by Andrea Hubbard, SECOND by Carla Eichler, to award the acoustical improvements project for the middle schools to J and J Acoustics, at a price of \$68,095 VOTES IN FAVOR, 12 (unanimous) MOTION CARRIED

- c. Discussion of Monthly Financial Statements
- d. Director of Finance and Administration Approved Transfers Under \$3,000

### e. Discussion and Possible Action on Budget Transfers of \$3,000 or More

MOTION by Patrick Reed, SECOND by Steven DeMaio, to vote on the following at the same time:

 budget transfer to cover the cost an upgrade to the building controls at Amity Middle Schools, Orange and Bethany campuses

ACCOUNT NUMBER	ACCOUNT NAME	FROM	ТО
05-14-2600-5715	Facilities Contingency	\$26,000	
02-14-2600-5420	Repair & Maintenance		\$26,000

• budget transfer to cover the cost to replace pipe insulation at Amity Middle School Orange

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
02-14-2600-5720	Improvements to Sites	\$12,000	
02-14-2600-5715	Improvements to Bldgs		\$12,000

• budget transfer to purchase a printer for fingerprinting during the onboarding process

ACCOUNT NUMBER	ACCOUNT NAME	FROM	ТО
05-14-2660-5715	Improvements-Building	\$8,100	
05-14-2660-5730	Equipment - New		\$8,100

VOTES IN FAVOR, 12 (unanimous)

**MOTION CARRIED** 

MOTION by Carla Eichler, SECOND by Dr. Oladele, to approve the following:

• budget transfer to cover the cost an upgrade to the building controls at Amity Middle Schools, Orange and Bethany campuses

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
05-14-2600-5715	Facilities Contingency	\$26,000	
02-14-2600-5420	Repair & Maintenance		\$26,000

• budget transfer to cover the cost to replace pipe insulation at Amity Middle School Orange

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	<u> </u>	1 1 1 1 1 1		
AC	COUNT NUMBER	ACCOUNT NAME	FROM	TO
05	-14-2660-5715	Improvements-Building	\$8,100	
05	-14-2660-5730	Equipment - New		\$8,100

VOTES IN FAVOR, 12 (unanimous)

**MOTION CARRIED** 

#### f. Other

### 1. Capital Project Report

MOTION by Dr. Sudhir, SECOND by Shannan Carlson, to approve the following:

- The implementation of the Siemens Design HVAC Control Upgrade at Amity Regional High School
- The purchase of 14 variable frequency drives for Amity Regional High School

**VOTES IN FAVOR, 12 (unanimous)** 

**MOTION CARRIED** 

MOTION by Shannan Carlson, SECOND by Dr. Oladele, to approve the following:

• A transfer from remaining funds in the paving project account to the HVAC Project Account for the implementation of the Siemens Design HVAC Control Upgrade at Amity Regional High School

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
17-00-15-0050-5720	Paving	\$46,585	
17-00-15-0048-5715	HVAC Projects		\$46,585

• A transfer from the paving line item budget for the purchase of 14 variable frequency drives for Amity Regional High School, \$53,100.

ACCOUNT NUMBER	ACCOUNT NAME	FROM TO
17-00-15-0050-5720	Paving	\$53,100
17-00-15-0048-5715	HVAC Projects	\$53,100

VOTES IN FAVOR, 12 (unanimous)

**MOTION CARRIED** 

### 2. Lunch Program Update

#### 3. Personnel

MOTION by Christopher Browe, SECOND by Shannan Carlson, to enter Executive Session and invite Dr. Byars and Theresa Lumas
VOTES IN FAVOR, 12 (unanimous)

**MOTION CARRIED** 

Entered Executive Session at 8:53 p.m.

- Discussion of Nurses' Contract (Executive Session)
- b. Discussion of Paraeducators' Contract (Executive Session)

Exited Executive Session at 9:09 p.m.

#### c. Possible Action on Nurses' Contract

MOTION by Carla Eichler, SECOND by Dr. Turner, to approve Nurses' Contract VOTES IN FAVOR, 11 (unanimous)
MOTION CARRIED

#### d. Possible Action on Paraeducators' Contract

MOTION by Christopher Browe, SECOND by Paul Davis, to approve Paraeducators' Contract VOTES IN FAVOR, 11 (unanimous)
MOTION CARRIED

- 9. **NEW BUSINESS**
- 10. ITEMS FOR THE NEXT AGENDA Due to Chairperson by Oct 29, 2021

#### 11. ADJOURNMENT

MOTION by Christopher Browe, SECOND by Shannan Carlson, to adjourn meeting VOTES IN FAVOR, 11 (unanimous)
MOTION CARRIED

Meeting adjourned at 8:13 p.m.

Respectfully submitted,
Pamela Pero
Pamela Pero, Recording Secretary

## AMITY REGIONAL SCHOOL DISTRICT NO. 5 BOARD OF EDUCATION NOVEMBER 1, 2021 SPECIAL MEETING MINUTES 5:30 P.M.

25 Newton Road, Woodbridge, CT

#### **BOARD MEMBERS PRESENT**

John Belfonti, Carla Eichler, George Howard, Patrick Reed, Dr. Jennifer Turner, Christopher Browe (arrived 5:50 pm), Dr. K. Sudhir (arrived 6:10 p.m.), Shannon Carlson (departed 7:15 pm), Dr. Carol Oladele (departed 8:00 p.m.), Donna Schuster (remote),

#### **BOARD MEMBERS ABSENT**

Paul Davis, Steven DeMaio, Andrea Hubbard

#### STAFF MEMBERS PRESENT

Dr. Jennifer Byars

#### 1. CALL TO ORDER

Chairperson Belfonti called the meeting to order at 5:37 p.m.

### 2. DISCUSSION OF BOARD OF EDUCATION GOALS

Presented by Mary Broderick, CABE Search Services

#### 3. ADJOURNMENT

MOTION by George Howard, SECOND by Dr. Sudhir, to adjourn meeting VOTES IN FAVOR, 10 (unanimous)
MOTION CARRED

Meeting adjourned at 8:40 p.m.

Respectfully submitted,

Carla Eichler
Board of Education Secretary

CE/pjp



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### **2021 - 2022**



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### NATIONAL MERIT SCHOLARSHIP PROGRAM

## \*Semi-Finalists\*

ROBERT FARBMAN
LILIANA RESTREPO
PRANAV SUNDARARAJAN

### \*Commended Scholars\*

ADITI CHALASANI **CINDY CHEN** DAVID CHO **BRIAN FOURNIER** NIHARIKA JOG JASON KWON **BRODEY LU AUDREY MARIN** VARUN PRABHU **ERIC SONG** LIAM TASSIELLO ADITHI WIJESEKERA PREETHILA ZAMAN UPOLA ZAMAN



Amity Regional School District #5

Executive Summary - Third Quarter 2021

This report is intended for the exclusive use of clients or prospective clients of Fiducient Advisors. The information contained herein is intended for the recipient, is confidential and may not be disseminated or distributed to any other person without prior approval. Any dissemination or distribution is strictly prohibited. Information has been obtained from a variety of sources believed to be reliable though not independently verified. Any forecasts represent future expectations and actual returns; volatilities and correlations will differ from forecasts. This report does not represent a specific investment recommendation. Please consult with your advisor, attorney and accountant, as appropriate, regarding specific advice.

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### Fiducient Advisors Update



### Retirement Plans

### **Featured Insights**

- Webcast: DOL Cybersecurity Guidance for ERISA Plans
- Plan Sponsor Newsletter September

### **Coming Soon**

- The Public Fiduciary Newsletter – October
- Cybersecurity Webcast Series: Recordkeeper Updates



## **Endowments & Foundations**

### **Featured Insights**

Nonprofit Investment Stewards
 Podcast – bimonthly episodes

### **Coming Soon**

- The Steward Newsletter November
- ESG Annual Update



### **Featured Insights**

- Seeking Clarity on Tax Reform The Wait Continues...
- The Advisor Newsletter August

### **Coming Soon**

 The Advisor Newsletter – October

### **Recent Speaking Engagements**

- ALTSCHI Virtual Conference 2021
- ASAE Annual Meeting
- CAIA Info Series
- CÜPÄ-HR NYC Meeting

- Markets Group 7th Annual Midwest Institutional Forum
- P&I Conferences: DC Investment Lineup Virtual Series
- P&I Conferences: ESG Investing Virtual Series
- PLANSPONSOR 2021 Virtual HSA Confederate

### Fiducient Advisors Update

# Research Insights

- Monthly market recaps
- Monthly market updates
  - Summer Rain Feeds the Equity Market August
  - Normalcy Moves Markets Higher, but Concerns Rise July
- 2021 Third Quarter Considerations
- In Focus: China's Regulatory Shifts Impacting Emerging Markets
- The Next Chapter in the Active versus Passive Debate
- Private Markets Updates: Growth and New Highs
- Webcast: Who Said U.S. Stocks are Boring? U.S. Macro Update

### 2021 New Associates - Welcome!

- · Miguele Atkins, Performance Analyst
- · John Bayer, Performance Analyst
- Stephen Bergman, Consultant
- · Maggie Bujdasz, Middle Office Operations Analyst
- · Linda Byrnes, Senior RFP Specialist
- · Josh Daniel, Consulting Analyst
- Meredith Doyle, Director of Human Resources
- Andrew Dufur, Performance Analyst

- · Kerry Elsass, Senior Consultant
- Michelle Goedken, Client Service Associate, TWO®
- Michael Hargrove, Human Resources Coordinator
- Duncan Harris, Middle Office Associate
- Emilee Lalchandani, Client Service Associate
- Timothy Ng, Senior Consultant
- Cheryl Rabin, Client Service Associate
- Alex Wikstrom, Consulting Analyst

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Section 1 Fiduciary Governance Calendar

Section 2 Capital Markets Overview

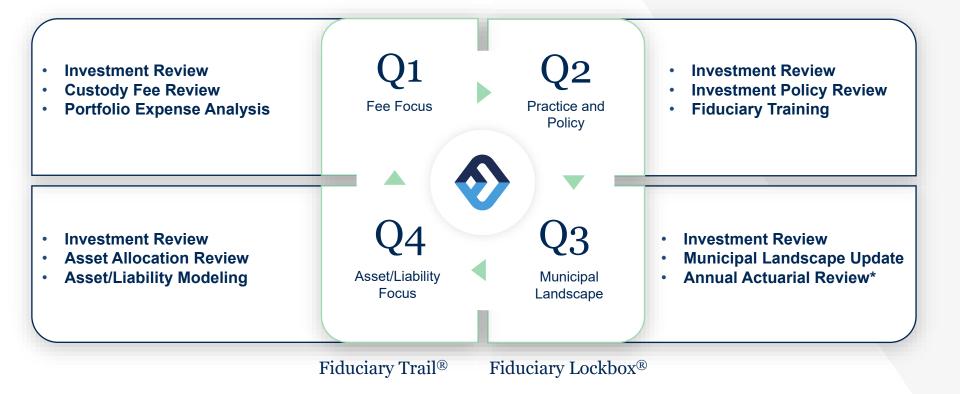
Section 3 Portfolio and Manager Review

Section 4 Appendix

Section 1 Fiduciary Governance Calendar

## **②**

### Fiduciary Governance Calendar



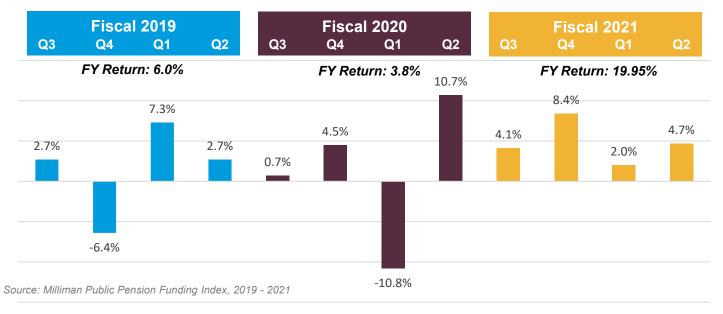
<sup>\*</sup>Timing of attlustries review is dependent on client's individual plan and/or fiscal year and actuarial input.



### Trends in Public Pension Asset Returns

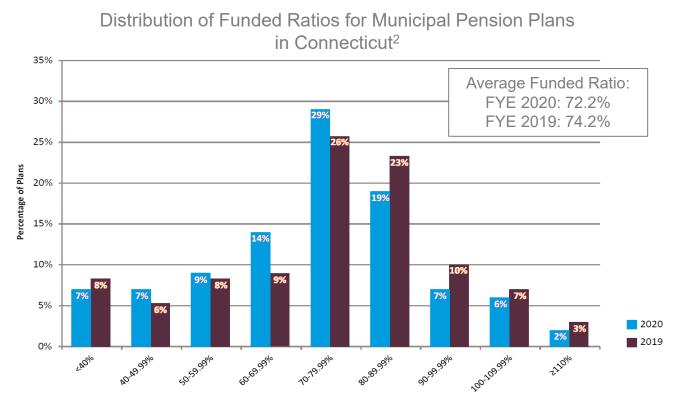
- According to Milliman's Public Pension Index, the average return for the 12-month period ending 6/30/2021 for the 100 largest U.S. public pension plans was 19.95%, well exceeding their expected long-term earnings assumptions.<sup>1</sup>
- The strong investment returns may provide municipalities with an opportunity to revisit the actuarial assumptions used to value plan liabilities and address any inconsistencies.





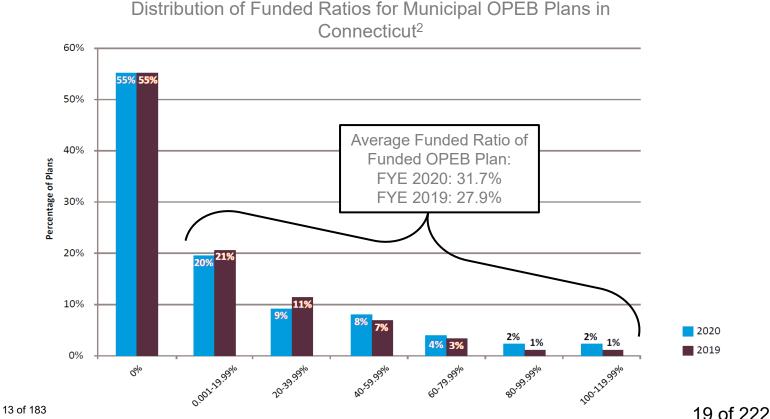
### Trends in Funded Ratios

- Milliman estimates average funded ratio of the 100 largest U.S. public pension plans during the past year improved by more than 10-percentage points, driven primarily part by the strong investment results in FYE 6/30/2021.<sup>1</sup>
- We would expect many local municipal pension plans will also see significant improvement in their funded positions as of 6/30/2021 compared to last year, a welcome change to the historical trajectory of the funded ratios of municipal pension plans in Connecticut, as reported by actuarial firm Hooker & Holcombe.<sup>2</sup>



### Trends in Funded Ratios

- Milliman estimates average funded ratio of the 100 largest U.S. public pension plans during the past year improved by more than 10-percentage points, driven primarily part by the strong investment results in FYE 6/30/2021.<sup>1</sup>
- We would expect many funded OPEB plans will also see significant improvement in their funded positions as of 6/30/2021 compared to last year, a welcome change to the historical trajectory of the funded ratios of OPEB plans in Connecticut, as reported by actuarial firm Hooker & Holcombe.<sup>2</sup>



Section 2 Capital Markets Overview

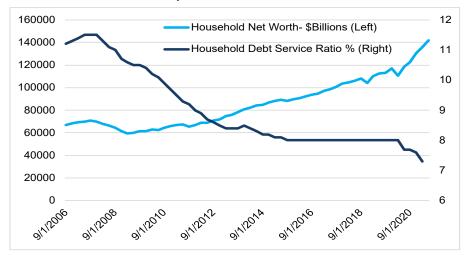
### **Market Themes**

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- Markets have encountered a somewhat more challenging landscape recently, evidenced by an evolving Fed message, policy gridlock in Washington, and the lingering challenges presented by the Delta variant.
- The financial health of consumers remains strong, which may serve to sustain economic momentum moving forward.
- Investment returns this quarter returned to a profile reminiscent of the first wave of market stability that occurred in the spring of 2020, with U.S. large cap and growth equity names outpacing their small cap and value counterparts.

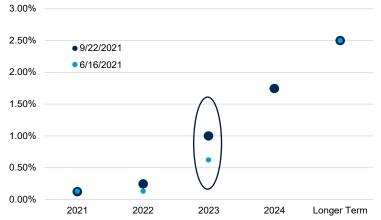
### **Strength of the Consumer**

The financial health of the consumer (whose spending comprises approximately 70% of GDP) remains robust, evidenced by record high household net worth and very low indebtedness.



#### Median FOMC Committee Federal Funds Rate Forecast

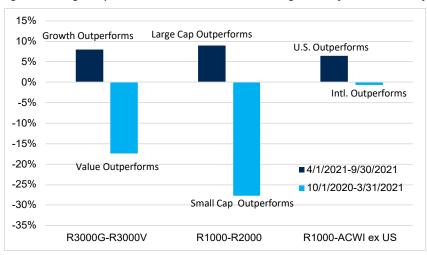
While there were no changes in the FOMC Committee's ultimate forecast for the Fed Funds Rate, the projected timeline for getting there has been accelerated, as noted by the higher expected rates for 2022 and 2023 when comparing the June and September forecasts.



Source: Federal Reserve

### A Reversal in Market Leadership

Value, small cap, and international equity market outperformance for the six-month period ending 3/31/21 has now completely reversed with growth, large cap, and domestic markets leading the way more recently.



Source: FactSet

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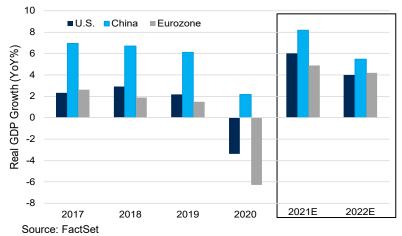
See disclosures for list of indices representing each asset class. Past performance does not indicate future performance and there is a possibility of a loss.

### **Economic Review**

## **②**

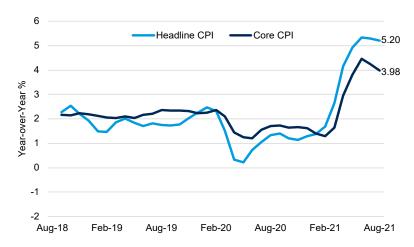
### Real GDP (YoY)

Estimates for 2021 GDP remain robust, reflecting pent up consumer demand and robust household savings rates, although persisting challenges brought about by Covid could pose a risk to this outlook.



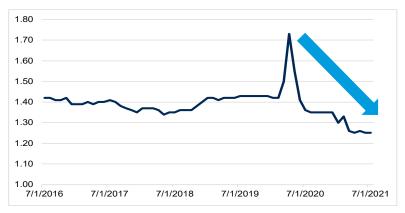
### U.S. Inflation

Inflation has moved noticeably higher this year. Supply chain disruptions, rising energy prices, and a lower 2020 base have all contributed to this condition.



#### **Total Business: Inventories to Sales Ratio**

Supply chain disruptions have presented challenges to many businesses. The graph below highlights the supply shocks faced by many companies through declining inventories as a percentage of sales.



Source: Federal Reserve Bank of St. Louis

### WTI Crude Oil Prices (\$/bbl)

Oil prices have touched 5-year highs at nearly \$80 per barrel. Supply has been slow to come back online coming out of the pandemic.

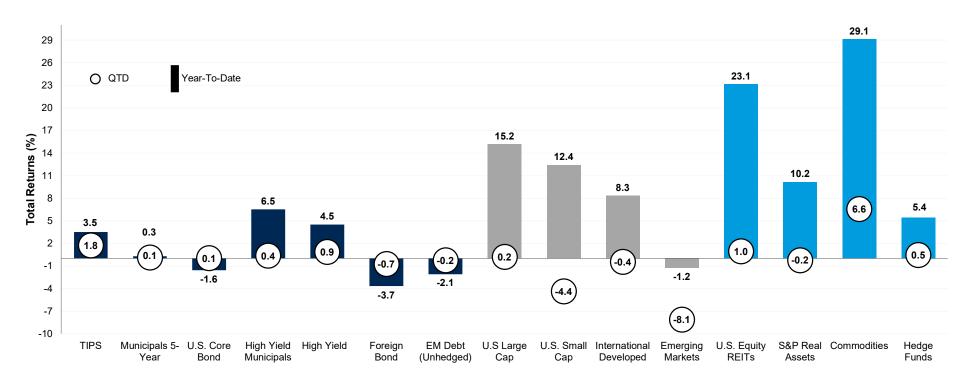


Source: FactSet Source: FactSet

See disclosures for list of indices representing each asset class. Past performance does not indicate future performance and there is a possibility of a loss.

### **Asset Class Returns**





<sup>\*</sup>Hedge fund returns are lagged 1 month. Sources: FactSet, J.P. Morgan, Russell, MSCI, FTSE Russell, Alerian.

### Fixed Income (3Q)

- Interest rates moved higher across the curve as investors continue to grapple with potential impacts from future Federal Reserve policy.
- Investment grade and high yield spreads widened during the quarter.

### Equity (3Q)

- Sentiment shifted during the 3<sup>rd</sup> quarter with investors selling out of the perceived riskier asset classes, namely small caps and emerging markets.
- Emerging markets struggled, driven by poor performance from the larger country constituents, namely China and Korea.

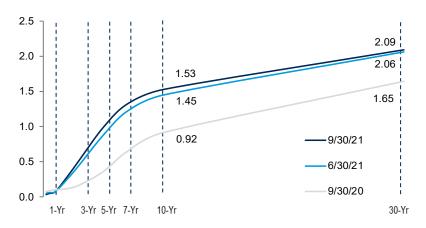
### Real Asset / Alternatives (3Q)

- + REITs continued to benefit from increasing demand and low interest rates.
- + Commodities drew considerable strength from higher energy prices (particularly advances in oil), although strong performance was broad based across sectors.

### Fixed Income Market Update

### **U.S. Treasury Yield Curve**

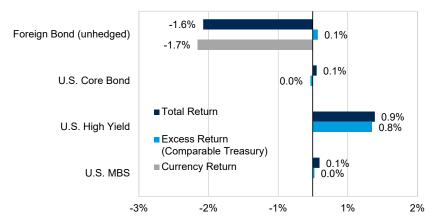
U.S. Treasuries moved slightly higher in the quarter with the 10-year and 30-year rates increasing 8bps and 3bps, respectively.



Source: FactSet

### **Index Performance Attribution (3Q 2021)**

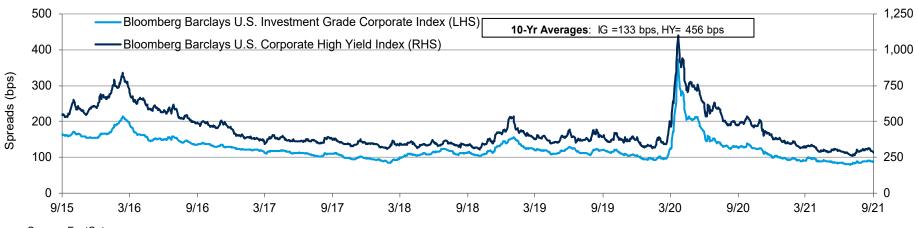
Despite headwinds from rising rates and wider spreads, U.S. fixed income markets were marginally positive driven by coupon payments. Dollar strength, particularly in September, weighed on foreign bonds.



Source: FactSet

### **Credit Market Spreads – Trailing 5 Years**

Credit spreads widened during the quarter with investment grade and high yield spreads increasing 4bps and 21bps, respectively.

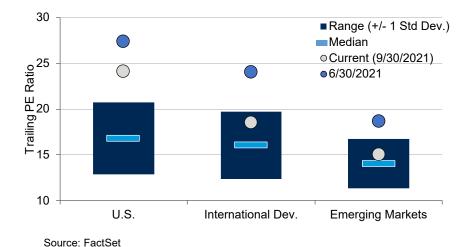


Source: FactSet

### **Equity Market Update**

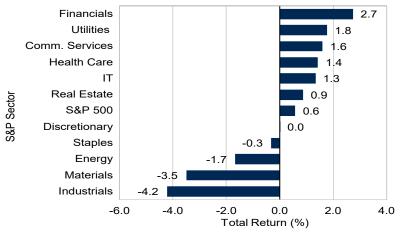
### **Equity Valuations (Trailing 15 Years)**

While valuations remain somewhat elevated relative to historical norms, underlying company earnings have proven resilient, which has helped investors rationalize current price levels.



### U.S. Equities – Return by Sector (3Q 2021)

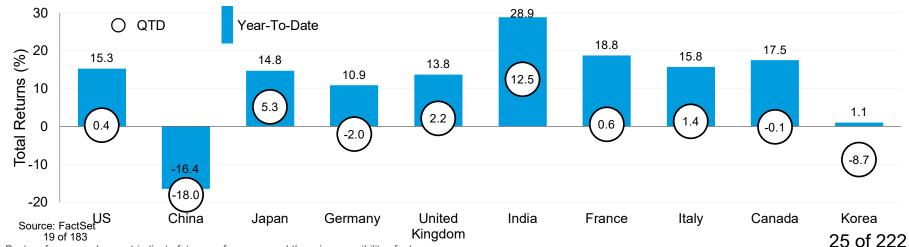
U.S. equity performance was mixed across sectors. Financials and utilities led for the quarter while materials and industrials were laggards.



Source: FactSet.

### Country Total Returns (%) – Top 10 Largest Economies

While there were pockets of opportunity across countries, China was at the center of headlines during the quarter. Regulatory restrictions caused major sell-offs across the market with the education and technology sectors getting hit the hardest. Contagion effects were felt across emerging markets with Korea getting caught up in the sell-off as well. For more details on the evolving situation in China please reference our white paper here.



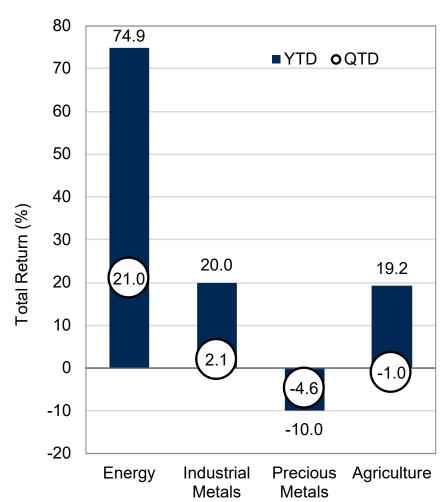
Past performance does not indicate future performance and there is a possibility of a loss.

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### Real Assets Market Update

### **Real Assets Performance**

Energy was the primary contributor to the performance within real assets. Supply disruptions have impacted output and have significantly driven up the prices of natural gas and crude oil.



#### **REIT Sector Performance**

The residential, industrial and self storage sectors continued to perform well, benefitting from the suburbanization trend. Health care and lodging & resorts were laggards for the period.



Source: FactSet Source: FactSet

## •

### The Case For Diversification

2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	YTD	10Yr (Ann)
TIPS 13.6	Emerging Markets 18.2	U.S. Small Cap 38.8	U.S. Equity REITs 30.1	U.S. Equity REITs 3.2	U.S. Small Cap 21.3	Emerging Markets 37.3	High Yield Munis 4.8	U.S. Large Cap 31.5	U.S. Small Cap 20.0	Commodities 29.1	U.S. Large Cap 16.6
High Yield Munis 9.3	High Yield Munis 18.1	U.S. Large Cap 32.4	High Yield Munis 13.8	Municipals 5-Year 2.4	High Yield 17.1	International Dev. 25.0	Municipals 5-Year 1.7	U.S. Equity REITs 26.0	U.S. Large Cap 18.4	U.S. Equity REITs 23.1	U.S. Small Cap 14.6
U.S. Equity REITs 8.3	U.S. Equity REITs 18.1	International Dev. 22.8	U.S. Large Cap 13.7	High Yield Munis 1.8	U.S. Large Cap 12.0	U.S. Large Cap 21.8	Foreign Bond 0.5	U.S. Small Cap 25.5	Emerging Markets 18.3	U.S. Large Cap 15.9	U.S. Equity REITs 11.3
Core Bond 7.8	International Dev. 17.3	Balanced 12.2	Core Bond 6.0	U.S. Large Cap 1.4	Commodities 11.7	EM Debt (unhedged) 15.2	Core Bond 0.0	International Dev. 22.5	TIPS 11.0	U.S.Small Cap 12.4	International Dev. 8.1
Municipals 5-Year 6.9	EM Debt (unhedged) 16.9	Hedge Funds 9.0	Balanced 5.1	Core Bond 0.6	Emerging Markets 11.2	U.S. Small Cap 14.6	TIPS -1.3	Emerging Markets 18.4	Balanced 8.8	International Dev. 8.3	Balanced 7.7
High Yield 5.0	U.S. Small Cap 16.3	High Yield 7.4	U.S. Small Cap 4.9	Hedge Funds -0.3	EM Debt (unhedged) 9.9	Balanced 13.6	High Yield -2.1	Balanced 17.5	International Dev. 7.8	Balanced 6.6	High Yield 7.4
Foreign Bond 4.2	U.S. Large Cap 16.0	U.S. Equity REITs 2.5	TIPS 3.6	International Dev. -0.8	U.S. Equity REITs 8.5	High Yield Munis 9.7	Hedge Funds -4.0	High Yield 14.3	Core Bond 7.5	High Yield Munis 6.5	High Yield Munis 6.7
U.S. Large Cap 2.1	High Yield 15.8	Municipals 5-Year 0.8	Hedge Funds 3.4	TIPS -1.4	Balanced 7.6	Hedge Funds 7.8	U.S. Large Cap -4.4	EM Debt (unhedged) 13.5	Hedge Funds 7.1	Municipals 5-Year 6.5	EM Debt (unhedged) 6.6
Balanced 0.9	Balanced 11.5	Foreign Bond -1.0	Municipals 5-Year 3.2	Foreign Bond -2.3	TIPS 4.7	High Yield 7.5	U.S. Equity REITs -4.6	High Yield Munis 10.7	High Yield 7.1	Hedge Funds 5.4	Emerging Markets 6.1
EM Debt (unhedged) -1.8	TIPS 7.0	Core Bond -2.0	Foreign Bond 2.9	Balanced -3.3	Foreign Bond 3.2	Foreign Bond 6.5	Balanced -5.8	Core Bond 8.7	Foreign Bond 7.0	High Yield 4.5	Hedge Funds 4.1
U.S. Small Cap -4.2	Foreign Bond 5.3	Emerging Markets -2.6	High Yield 2.5	U.S. Small Cap -4.4	High Yield Munis 3.0	U.S. Equity REITs 5.2	EM Debt (unhedged) -6.2	TIPS 8.4	High Yield Munis 4.9	TIPS 3.5	Foreign Bond 3.9
Hedge Funds -5.7	Hedge Funds 4.8	High Yield Munis -5.5	Emerging Markets -2.2	High Yield -4.5	Core Bond 2.6	Core Bond 3.5	U.S. Small Cap -11.0	Hedge Funds 7.8	Municipals 5-Year 4.3	Emerging Markets -1.2	TIPS 3.1
Commodities -13.3	Core Bond 4.2	TIPS -8.6	International Dev. -4.9	Emerging Markets -14.9	International Dev. 1.0	Municipals 5-Year 3.1	Commodities -11.2	Commodities 7.7	EM Debt (unhedged) 2.7	Foreign Bond -1.4	Core Bond 3.0
International Dev. -12.1	Municipals 5-Year 3.0	EM Debt (unhedged) -9.0	EM Debt (unhedged) -5.7	EM Debt (unhedged) -14.9	Hedge Funds 0.5	TIPS 3.0	International Dev. -13.8	Foreign Bond 6.3	Commodities -3.1	Core Bond -1.6	Municipals 5-Year 2.5
Emerging Markets -18.4	Commodities -1.1	Commodities -9.5	Commodities -17.0	Commodities -24.7	Municipals 5-Year -0.4	Commodities 1.7	Emerging Markets -14.6	Municipals 5-Year 5.4	U.S. Equity REITs -8.0	EM Debt (unhedge) -1.9	Commodities -2.7



### Financials Markets Performance

### **Financial Markets Performance**

Total return as of September 30, 2021

Periods greater than one year are annualized All returns are in U.S. dollar terms

Global Fixed Income Markets	QTD	YTD	1YR	3YR	5YR	7YR	10YR	15YR
Bloomberg Barclays 1-3-Month T-Bill	0.0%	0.0%	0.1%	1.1%	1.1%	0.8%	0.6%	0.9%
Bloomberg Barclays U.S. TIPS	1.8%	3.5%	5.2%	7.4%	4.3%	3.9%	3.1%	4.4%
Bloomberg Barclays Municipal Bond (5 Year)	0.1%	0.3%	1.1%	3.9%	2.4%	2.4%	2.5%	3.5%
Bloomberg Barclays High Yield Municipal Bond	0.4%	6.5%	11.3%	7.4%	6.0%	6.0%	6.7%	5.3%
Bloomberg Barclays U.S. Aggregate	0.1%	-1.6%	-0.9%	5.4%	2.9%	3.3%	3.0%	4.2%
Bloomberg Barclays U.S. Corporate High Yield	0.9%	4.5%	11.3%	6.9%	6.5%	5.9%	7.4%	7.3%
Bloomberg Barclays Global Aggregate ex-U.S. Hedged	-1.6%	-1.4%	-0.5%	3.9%	2.7%	3.5%	3.9%	4.0%
Bloomberg Barclays Global Aggregate ex-U.S. Unhedged	-1.6%	-5.9%	-1.1%	3.2%	1.1%	1.2%	0.9%	2.9%
Bloomberg Barclays U.S. Long Gov / Credit	0.1%	-4.6%	-3.0%	10.1%	5.2%	6.2%	5.8%	7.0%
JPMorgan GBI-EM Global Diversified	-0.2%	-2.1%	0.6%	7.1%	5.7%	6.4%	6.6%	7.7%
Global Equity Markets	QTD	YTD	1YR	3YR	5YR	7YR	10YR	15YR
6&P 500	0.6%	15.9%	30.0%	16.0%	16.9%	14.0%	16.6%	10.4%
Dow Jones Industrial Average	-1.5%	12.1%	24.2%	11.0%	15.7%	12.9%	14.7%	10.1%
NASDAQ Composite	-0.2%	12.7%	30.3%	22.7%	23.4%	19.4%	20.9%	14.3%
Russell 3000	-0.1%	15.0%	31.9%	16.0%	16.9%	13.9%	16.6%	10.4%
Russell 1000	0.2%	15.2%	31.0%	16.4%	17.1%	14.1%	16.8%	10.5%
Russell 1000 Growth	1.2%	14.3%	27.3%	22.0%	22.8%	18.5%	19.7%	13.3%
Russell 1000 Value	-0.8%	16.1%	35.0%	10.1%	10.9%	9.3%	13.5%	7.5%
Russell Mid Cap	-0.9%	15.2%	38.1%	14.2%	14.4%	12.2%	15.5%	10.3%
Russell Mid Cap Growth	-0.8%	9.6%	30.5%	19.1%	19.3%	15.4%	17.5%	12.0%
Russell Mid Cap Value	-1.0%	18.2%	42.4%	10.3%	10.6%	9.6%	13.9%	8.8%
Russell 2000	-4.4%	12.4%	47.7%	10.5%	13.5%	11.9%	14.6%	9.2%
Russell 2000 Growth	-5.7%	2.8%	33.3%	11.7%	15.3%	13.2%	15.7%	10.6%
Russell 2000 Value	-3.0%	22.9%	63.9%	8.6%	11.0%	10.2%	13.2%	7.5%
MSCI ACWI	-1.1%	11.1%	27.4%	12.6%	13.2%	9.9%	11.9%	7.2%
MSCI ACWI ex. U.S.	-3.0%	5.9%	23.9%	8.0%	8.9%	5.7%	7.5%	4.4%
MSCI EAFE	-0.4%	8.3%	25.7%	7.6%	8.8%	5.8%	8.1%	4.1%
MSCI EAFE Growth	0.1%	6.9%	20.9%	11.9%	11.4%	8.7%	10.1%	5.8%
MSCI EAFE Value	-1.0%	9.6%	30.7%	3.0%	6.0%	2.7%	6.0%	2.2%
MSCI EAFE Small Cap	0.9%	10.0%	29.0%	9.0%	10.4%	9.2%	10.7%	6.4%
MSCI Emerging Markets	-8.1%	-1.2%	18.2%	8.6%	9.2%	5.6%	6.1%	5.7%
Alternatives	QTD	YTD	1YR	3YR	5YR	7YR	10YR	15YR
Consumer Price Index*	0.7%	4.4%	5.2%	2.7%	2.6%	2.0%	1.9%	2.0%
FTSE NAREIT Equity REITs	1.0%	23.1%	37.4%	10.0%	6.8%	9.0%	11.3%	6.5%
S&P Real Assets	-0.2%	10.2%	21.4%	7.3%	6.0%	4.5%	6.0%	5.6%
TSE EPRA NAREIT Developed	1.6%	21.7%	32.4%	7.3%	4.9%	8.0%	10.9%	5.2%
TSE EPRA NAREIT Developed ex U.S.	-2.6%	6.6%	21.5%	4.9%	5.0%	4.8%	7.7%	3.4%
Bloomberg Commodity Total Return	6.6%	29.1%	42.3%	6.9%	4.5%	-1.5%	-2.7%	-2.1%
HFRI Fund of Funds Composite*	0.5%	5.4%	13.8%	6.3%	5.8%	4.1%	4.1%	3.1%
HFRI Fund Weighted Composite*	-0.2%	10.0%	20.8%	8.4%	7.4%	5.5%	5.4%	5.0%
Alerian MLP	-5.7%	39.4%	84.6%	-4.3%	-2.4%	-6.9%	1.2%	5.1%

<sup>\*</sup>One month lag.

Source: FactSet & Morningstar as of 9/30/21. Periods greater than 1 year are annualized. All returns are in U.S. dollar terms. 22 of 183

Section 3 Portfolio and Manager Review

### **Asset Allocation**

### **Amity Pension**

### As of September 30, 2021

	Asset Allocation (\$)	Asset Allocation (%)	Target Allocation (%)	Differences (%)
Amity Pension	17,549,479	100.0	100.0	0.0
Short Term Liquidity	489,374	2.8	0.0	2.8
Wells Fargo Government Money Market Fund I	489,374	2.8	0.0	2.8
Fixed Income	5,544,936	31.6	35.0	-3.4
Vanguard Total Bond Market Index Adm	2,757,537	15.7	17.5	-1.8
BlackRock Strategic Income Opportunities K	2,787,399	15.9	17.5	-1.6
Domestic Equity	8,945,467	51.0	50.0	1.0
Vanguard 500 Index Adm	1,816,510	10.4	10.0	0.4
Vanguard Value Index Adm	2,717,904	15.5	15.0	0.5
Vanguard Growth Index Adm	2,680,842	15.3	15.0	0.3
Vanguard Mid-Cap Index Adm	882,565	5.0	5.0	0.0
Vanguard Small-Cap Index Adm	847,646	4.8	5.0	-0.2
International Equity	2,569,701	14.6	15.0	-0.4
Vanguard Developed Markets Adm	2,569,701	14.6	15.0	-0.4

### **Total Portfolio Performance Summary**

**Amity Pension** 

As of September 30, 2021

**Account Reconciliation** 

	QTR	YTD	Since Inception	Inception Date
Amity Pension				01/01/2007
Beginning Market Value	17,456,831	16,024,536	5,911,809	
Net Contributions	134,167	113,323	923,904	
Total Gain/Loss	-41,519	1,411,620	10,713,766	
<b>Ending Market Value</b>	17,549,479	17,549,479	17,549,479	

**Amity Pension Benchmark Composition** 

Allocation Mandate	Weight (%)
Mar-2014	
Blmbg. U.S. Aggregate Index	35.00
S&P 500 Index	10.00
CRSP U.S. Large Cap Value TR Index	15.00
CRSP U.S. Large Cap Growth TR Index	15.00
CRSP U.S. Mid Cap TR Index	5.00
CRSP U.S. Small Cap TR Index	5.00
FTSE Developed ex US Spliced Index	15.00

**Trailing Performance Summary** 

	QTR	YTD	Jul-2021 To Sep-2021	1 Year	3 Years	5 Years	7 Years	10 Years	Since Inception	Inception Date
Amity Pension	-0.2	8.8	-0.2	20.6	11.4	10.9	9.1	10.7	7.3	01/01/2007
Amity Pension Benchmark	-0.1	8.3	-0.1	19.2	11.4	10.9	9.2	10.7	7.4	
Difference	-0.1	0.5	-0.1	1.4	0.0	0.0	-0.1	0.0	-0.1	

**Calendar Year Performance Summary** 

	2020	2019	2018	2017	2016	2015	2014	2013
Amity Pension	15.1	21.1	-4.8	15.6	7.2	0.3	7.2	18.8
Amity Pension Benchmark	14.6	21.8	-4.7	15.5	7.5	0.6	7.7	18.6
Difference	0.5	-0.7	-0.1	0.1	-0.3	-0.3	-0.5	0.2

### **Manager Performance Overview**

Amity Pension
As of September 30, 2021

	QTD	YTD	1 Year	3 Years	5 Years	7 Years	10 Years	Since Inception	Inception Date
Short Term Liquidity									
Wells Fargo Government Money Market Fund I	0.0	0.0	0.0	1.0	1.0	0.7	0.5	0.9	01/01/2007
90 Day U.S. Treasury Bill	0.0	0.0	0.1	1.2	1.2	0.9	0.6	0.9	02, 02, 200
Fixed Income	0.0	-0.1	2.3	5.4	3.2	3.4	3.4	3.9	04/01/2009
Blmbg. U.S. Aggregate Index	0.1	-1.6	-0.9	5.4	2.9	3.3	3.0	3.9	
Vanguard Total Bond Market Index Adm	0.1 (30)	-1.6 (73)	-0.9 (84)	5.4 (60)	2.9 (67)	3.3 (51)	N/A	2.8 (58)	09/01/2012
Blmbg. U.S. Aggregate Index	0.1	-1.6	-0.9	5.4	2.9	3.3	N/A	2.8	
IM U.S. Broad Market Core Fixed Income (MF) Median	0.0	-1.2	0.2	5.6	3.2	3.3	N/A	2.9	
BlackRock Strategic Income Opportunities K	-0.1 (67)	1.3 (50)	5.4 (43)	5.2 (19)	N/A	N/A	N/A	4.1 (21)	10/01/2017
Blmbg. U.S. Aggregate Index	0.1	-1.6	-0.9	5.4	N/A	N/A	N/A	3.7	
IM Alternative Credit Focus (MF) Median	0.1	1.2	5.0	4.0	N/A	N/A	N/A	3.1	
Domestic Equity	0.0	15.5	32.3	16.0	16.7	13.8	16.5	17.0	04/01/2009
Domestic Equity Composite Benchmark	0.0	15.4	32.3	15.7	16.6	13.8	16.6	17.0	
Vanguard 500 Index Adm	0.6 (26)	15.9 (35)	30.0 (41)	16.0 (33)	16.9 (27)	14.0 (16)	N/A	15.4 (19)	09/01/2012
S&P 500 Index	0.6	15.9	30.0	16.0	16.9	14.0	N/A	15.4	
IM U.S. Large Cap Core Equity (MF) Median	0.0	15.0	29.0	14.7	15.7	12.6	N/A	14.1	
Vanguard Value Index Adm	-1.0 (60)	15.7 (62)	32.5 (68)	9.9 (47)	12.1 (25)	10.4 (14)	N/A	12.8 (13)	09/01/2012
CRSP US Large Cap Value Spliced Index	-0.9	15.7	32.5	9.9	12.2	10.4	N/A	12.9	
IM U.S. Large Cap Value Equity (MF) Median	-0.7	16.9	35.6	9.7	11.3	9.0	N/A	11.4	
Vanguard Growth Index Adm	1.4 (18)	14.9 (24)	28.1 (23)	22.8 (19)	22.2 (36)	17.8 (35)	N/A	18.1 (33)	09/01/2012
CRSP US Large Cap Growth Spliced Index	1.4	15.0	28.1	22.8	22.2	17.8	N/A	18.2	
IM U.S. Large Cap Growth Equity (MF) Median	0.5	13.0	26.0	20.6	21.2	17.1	N/A	17.6	
Vanguard Mid-Cap Index Adm	0.0 (27)	15.3 (57)	36.1 (69)	14.7 (9)	14.6 (13)	12.4 (13)	N/A	14.5 (6)	09/01/2012
CRSP US Mid Cap Spliced Index	0.0	15.3	36.1	14.8	14.6	12.4	N/A	14.6	
IM U.S. Mid Cap Core Equity (MF) Median	-0.9	15.8	38.2	11.1	11.7	9.8	N/A	12.0	

Returns for periods less than one year are not annualized. Returns are net of fees unless otherwise noted.

### **Manager Performance Overview**

### **Amity Pension**

As of September 30, 2021

	QTD	YTD	1 Year	3 Years	5 Years	7 Years	10 Years	Since Inception	Inception Date
Vanguard Small-Cap Index Adm	-2.6 (59)	13.3 (77)	44.1 (81)	12.0 (16)	14.0 (14)	12.0 (18)	N/A	13.8 (10)	09/01/2012
CRSP US Small Cap Spliced Index	-2.6	13.3	44.0	12.0	14.0	12.0	N/A	13.8	
IM U.S. Small Cap Core Equity (MF) Median	-2.3	17.3	49.9	9.1	11.8	10.4	N/A	12.1	
International Equity	-1.6	8.2	26.5	8.2	9.2	6.4	8.7	9.7	04/01/2009
International Equity Composite Benchmark	-1.1	8.6	27.2	8.1	9.1	6.3	8.4	9.6	
Vanguard Developed Markets Adm	-1.6 (54)	8.2 (38)	26.5 (27)	8.2 (30)	9.2 (18)	6.4 (19)	N/A	8.2 (19)	09/01/2012
FTSE Developed ex US Spliced Index	-1.1	8.6	27.2	8.1	9.1	6.3	N/A	8.1	
IM International Multi-Cap Core Equity (MF) Median	-1.4	7.7	24.6	7.2	8.3	5.5	N/A	7.4	

The inception date expressed on the Manager Performance Overview page(s) represents the first day of the first full month following the purchase of the investment. Performance figures shown at the fund level begin on this inception date. Inception dates for asset class composites reflect the start date at which these returns could be calculated using historical and existing system capabilities and may vary from the inception dates of underlying component strategies. Composite performance includes all funds held in the composite since inception.

Returns are net of fees unless otherwise stated. Mutual fund performance stated above may differ slightly from the current share class's historical performance due to share class exchanges.

## Manager Commentary As of September 30, 2021

Manager	Manager Status	
Fixed Income		
Vanguard Short Term Government Bond Index Adm	Maintain	
Vanguard Short Term Inflation Protection Adm	Maintain	
Vanguard Total Bond Market Index Adm	Maintain	
BlackRock Strategic Income Opportunities K	Maintain	
Domestic Equity		
Vanguard 500 Index Adm	Maintain	
Vanguard Total Stock Market Idx Adm	Maintain	
Vanguard Value Index Adm	Maintain	
Vanguard Growth Index Adm	Maintain	
Vanguard Mid Cap Index Adm	Maintain	
Vanguard Small Cap Index Adm	Maintain	
International Equity		
Vanguard Developed Markets Index Fund Adm	Maintain	

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# Manager Investment Gain/Loss Summary Amity Pension

	Market Value As of 07/01/2021	Net Flows	Return On Investment	Market Value As of 09/30/2021	
Short Term Liquidity					
Wells Fargo Government Money Market Fund I	355,195	134,167	13	489,374	
otal Short Term Liquidity	355,195	134,167	13	489,374	
ixed Income					
anguard Total Bond Market Index Adm	2,754,580	-	2,958	2,757,537	
lackRock Strategic Income Opportunities K	2,788,822	-	-1,423	2,787,399	
otal Fixed Income	5,543,402	-	1,535	5,544,936	
Domestic Equity					
anguard 500 Index Adm	1,806,201	-	10,309	1,816,510	
anguard Value Index Adm	2,744,145	-	-26,241	2,717,904	
anguard Growth Index Adm	2,644,408	-	36,434	2,680,842	
'anguard Mid-Cap Index Adm	882,523	-	42	882,565	
anguard Small-Cap Index Adm	870,442	-	-22,796	847,646	
otal Domestic Equity	8,947,719	-	-2,253	8,945,467	
nternational Equity					
anguard Developed Markets Adm	2,610,515	-	-40,814	2,569,701	
otal International Equity	2,610,515	-	-40,814	2,569,701	
mity Pension	17,456,831	134,167	-41,519	17,549,479	

### **Market Value and Flows Summary**

**Amity Pension** 

Since Inception Ending September 30, 2021

Periods Ending	Beginning Market Value (\$)	Net Cash Flow (\$)	Gain/Loss (\$)	Ending Market Value (\$)	% Return
Dec-2006	-	-	-	5,911,809	N/A
Mar-2007	5,911,809	-126,919	108,227	5,893,116	1.9
Jun-2007	5,893,116	-127,417	202,138	5,967,837	3.4
Sep-2007	5,967,837	276,936	123,140	6,367,912	2.0
Dec-2007	6,367,912	-128,226	-85,700	6,153,986	-1.4
Mar-2008	6,153,986	-127,169	-311,685	5,715,132	-5.1
un-2008	5,715,132	-128,659	-82,615	5,503,858	-1.6
Sep-2008	5,503,858	297,623	-407,460	5,394,022	-7.1
Dec-2008	5,394,022	-141,344	-594,469	4,658,209	-11.1
Mar-2009	4,658,209	-136,302	-351,150	4,170,757	-7.5
un-2009	4,170,757	-131,817	450,914	4,489,854	11.0
Sep-2009	4,489,854	312,896	557,229	5,359,979	11.7
Dec-2009	5,359,979	-134,759	158,595	5,383,815	3.0
Mar-2010	5,383,815	-139,407	202,610	5,447,017	3.9
un-2010	5,447,017	-137,079	-341,948	4,967,990	-6.4
Sep-2010	4,967,990	383,126	439,625	5,790,741	8.6
Dec-2010	5,790,741	-138,166	361,056	6,013,631	6.4
Mar-2011	6,013,631	-152,528	237,524	6,098,627	4.0
un-2011	6,098,627	-147,208	54,946	6,006,366	0.9
Sep-2011	6,006,366	450,579	-658,611	5,798,334	-10.3
Dec-2011	5,798,334	-144,369	396,030	6,049,996	6.9
Mar-2012	6,049,996	-141,160	502,103	6,410,939	8.4
un-2012	6,410,939	-145,381	-112,453	6,153,105	-1.8
Sep-2012	6,153,105	518,076	304,381	6,975,562	4.5
Dec-2012	6,975,562	-161,257	101,950	6,916,256	1.5
Mar-2013	6,916,256	-152,199	429,788	7,193,844	6.3
un-2013	7,193,844	-154,883	13,761	7,052,722	0.2
ep-2013	7,052,722	-163,413	369,080	7,258,389	5.3
Dec-2013	7,258,389	546,074	459,564	8,264,027	5.9
Mar-2014	8,264,027	-161,243	123,395	8,226,179	1.5

# **Market Value and Flows Summary**

**Amity Pension** 

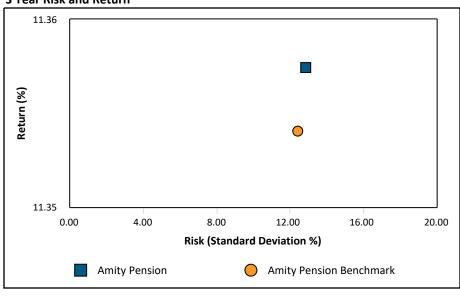
Since Inception Ending September 30, 2021

Periods Ending	Beginning Market Value (\$)	Net Cash Flow (\$)	Gain/Loss (\$)	Ending Market Value (\$)	% Return
Jun-2014	8,226,179	-149,491	324,061	8,400,749	4.0
Sep-2014	8,400,749	207,706	-82,993	8,525,461	-1.0
Dec-2014	8,525,461	-148,704	216,237	8,592,994	2.6
Mar-2015	8,592,994	223,388	201,466	9,017,848	2.3
lun-2015	9,017,848	-150,175	-45,017	8,822,656	-0.5
Sep-2015	8,822,656	243,709	-406,523	8,659,843	-4.6
Dec-2015	8,659,843	258,601	287,342	9,205,786	3.4
Mar-2016	9,205,786	-142,870	111,571	9,174,486	1.3
lun-2016	9,174,486	-137,601	186,090	9,222,976	2.0
Sep-2016	9,222,976	275,806	301,355	9,800,136	3.2
Dec-2016	9,800,136	-147,075	49,163	9,702,225	0.5
Mar-2017	9,702,225	280,371	440,274	10,422,869	4.4
lun-2017	10,422,869	-144,352	308,849	10,587,366	3.0
Sep-2017	10,587,366	287,670	356,674	11,231,710	3.3
Dec-2017	11,231,710	-149,941	447,236	11,529,004	4.0
Mar-2018	11,529,004	290,976	-73,289	11,746,691	-0.6
lun-2018	11,746,691	-146,829	165,134	11,764,997	1.4
Sep-2018	11,764,997	290,928	445,225	12,501,149	3.7
Dec-2018	12,501,149	-150,429	-1,111,056	11,239,665	-8.9
Mar-2019	11,239,665	296,357	1,066,103	12,602,125	9.2
un-2019	12,602,125	-150,217	445,364	12,897,271	3.6
Sep-2019	12,897,271	258,391	142,679	13,298,341	1.1
Dec-2019	13,298,341	-182,394	775,040	13,890,987	5.9
Mar-2020	13,890,987	228,177	-2,055,585	12,063,579	-14.6
lun-2020	12,063,579	-190,994	1,775,954	13,648,540	14.8
Sep-2020	13,648,540	203,599	807,277	14,659,416	5.8
Dec-2020	14,659,416	-208,430	1,573,550	16,024,536	10.9
Mar-2021	16,024,536	187,063	563,923	16,775,522	3.5
Jun-2021	16,775,522	-207,907	889,217	17,456,831	5.3
Sep-2021	17,456,831	134,167	-41,519	17,549,479	-0.2

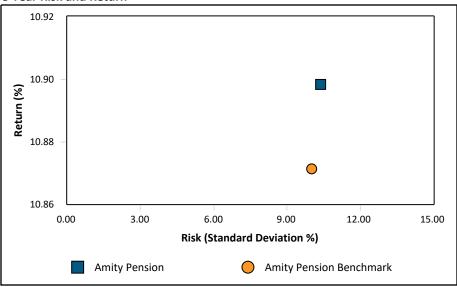
## Risk vs. Return

# Amity Pension As of September 30, 2021

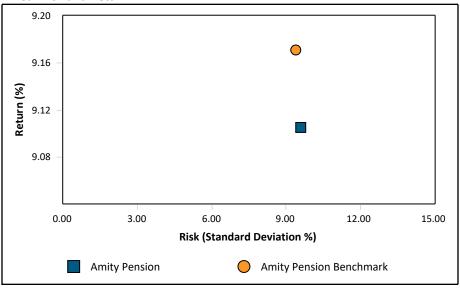
### 3 Year Risk and Return



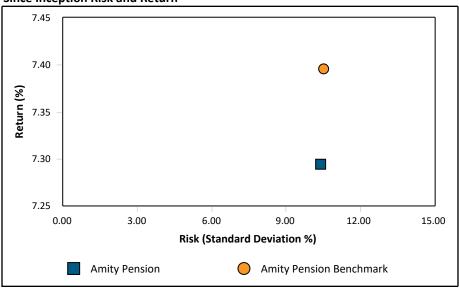
#### 5 Year Risk and Return



### 7 Year Risk and Return



### **Since Inception Risk and Return**



## **MPT Statistics**

## **Amity Pension**

## As of September 30, 2021

## **3 Year Historical MPT Statistics**

	Return	Standard Deviation	Downside Risk	Sharpe Ratio	Information Ratio	Tracking Error	R-Squared	Beta	Alpha
Amity Pension	11.36	12.85	8.36	0.81	0.07	0.85	1.00	1.03	-0.33
Amity Pension Benchmark	11.35	12.41	7.96	0.83	N/A	0.00	1.00	1.00	0.00
90 Day U.S. Treasury Bill	1.18	0.33	0.00	N/A	-0.83	12.53	0.13	-0.01	1.29

## **5 Year Historical MPT Statistics**

	Return	Standard Deviation	Downside Risk	Sharpe Ratio	Information Ratio	Tracking Error	R-Squared	Beta	Alpha
Amity Pension	10.90	10.35	6.67	0.94	0.09	0.71	1.00	1.03	-0.29
Amity Pension Benchmark	10.87	10.00	6.36	0.96	N/A	0.00	1.00	1.00	0.00
90 Day U.S. Treasury Bill	1.15	0.28	0.00	N/A	-0.96	10.09	0.10	-0.01	1.25

### 7 Year Historical MPT Statistics

	Return	Standard Deviation	Downside Risk	Sharpe Ratio	Information Ratio	Tracking Error	R-Squared	Beta	Alpha
Amity Pension	9.11	9.59	6.07	0.87	-0.06	0.65	1.00	1.02	-0.21
Amity Pension Benchmark	9.17	9.40	5.85	0.89	N/A	0.00	1.00	1.00	0.00
90 Day U.S. Treasury Bill	0.85	0.27	0.01	N/A	-0.89	9.45	0.04	-0.01	0.91

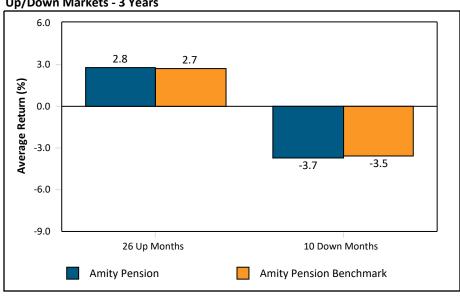
## **Since Inception Historical MPT Statistics**

	Return	Standard Deviation	Downside Risk	Sharpe Ratio	Information Ratio	Tracking Error	R-Squared	Beta	Alpha	Inception Date
Amity Pension	7.29	10.41	7.01	0.64	-0.11	0.93	0.99	0.99	0.01	01/01/2007
Amity Pension Benchmark	7.40	10.52	7.09	0.64	N/A	0.00	1.00	1.00	0.00	01/01/2007
90 Day U.S. Treasury Bill	0.91	0.41	0.01	N/A	-0.64	10.60	0.03	-0.01	0.96	01/01/2007

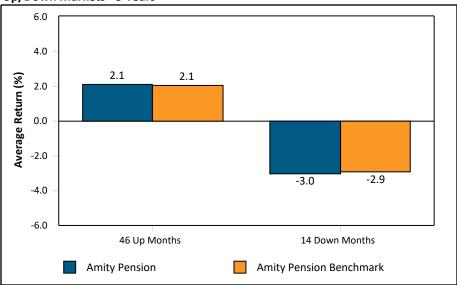
## **Market Capture Report**

## **Amity Pension** As of September 30, 2021

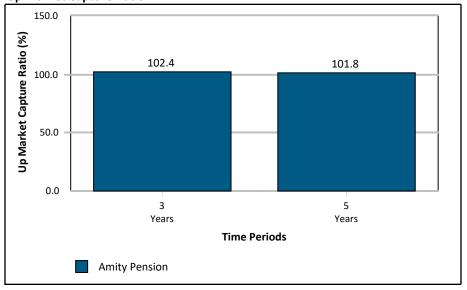




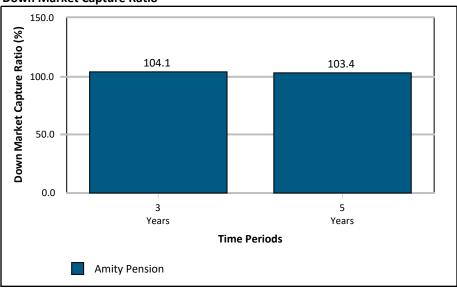
## **Up/Down Markets - 5 Years**



## **Up Market Capture Ratio**



### **Down Market Capture Ratio**



# **Estimated Fee** Analysis

## As of September 30, 2021

Manager	Current Target %	Fee Schedule
Vanguard Total Bond Market Index Adm	17.5%	0.05%
BlackRock Strategic Income Opportunities K	17.5%	0.76%
Vanguard 500 Index Adm	10.0%	0.04%
Vanguard Value Index Adm	15.0%	0.05%
Vanguard Growth Index Adm	15.0%	0.05%
Vanguard Mid Cap Index Adm	5.0%	0.05%
Vanguard Small Cap Index Adm	5.0%	0.05%
Vanguard Developed Markets Adm	15.0%	0.07%
Weighted Average Investment Management Fee		0.18%

DISCLOSURE: The figures on this page have been obtained from sources we deem to be reliable, including Morningstar. Fiducient Advisors has not independently verified this information.

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## **Asset Allocation**

## **Amity OPEB**

## As of September 30, 2021

	Asset Allocation (\$)	Asset Allocation (%)	Target Allocation (%)	Differences (%)
Amity OPEB	3,294,326	100.0	100.0	0.0
Short Term Liquidity	47,451	1.4	0.0	1.4
Wells Fargo Government Money Market Fund I	47,451	1.4	0.0	1.4
Fixed Income	1,240,538	37.7	40.0	-2.3
Vanguard Short Term Inflation Protection Adm	314,030	9.5	10.0	-0.5
Vanguard Total Bond Market Index Adm	305,408	9.3	10.0	-0.7
BlackRock Strategic Income Opportunities K	621,100	18.9	20.0	-1.1
Domestic Equity	1,360,032	41.3	40.0	1.3
Vanguard 500 Index Adm	1,035,809	31.4	30.0	1.4
Vanguard Small-Cap Index Adm	324,223	9.8	10.0	-0.2
International Equity	646,305	19.6	20.0	-0.4
Vanguard Developed Markets Index Fund Adm	646,305	19.6	20.0	-0.4

## **Total Portfolio Performance Summary**

## **Amity OPEB**

As of September 30, 2021

**Account Reconciliation** 

	QTR	YTD	Since Inception	Inception Date
Amity OPEB				12/01/2007
Beginning Market Value	3,304,141	3,007,781	507,703	
Net Contributions	-726	29,564	931,706	
Total Gain/Loss	-9,089	256,980	1,854,917	
Ending Market Value	3,294,326	3,294,326	3,294,326	
5	, ,	, ,	, ,	

**Amity OPEB Benchmark Composition** 

Allocation Mandate	Weight (%)
Oct-2017	
Blmbg. U.S. Aggregate Index	30.00
Bloomberg US TIPS 0-5 Year Index	10.00
S&P 500 Index	30.00
CRSP U.S. Small Cap TR Index	10.00
FTSE Developed ex US Spliced Index	20.00

**Trailing Performance Summary** 

	QTR	YTD	Jul-2021 To Sep-2021	1 Year	3 Years	5 Years	7 Years	10 Years	Since Inception	Inception Date
Amity OPEB	-0.3	8.5	-0.3	20.6	10.2	9.9	8.1	9.4	7.3	12/01/2007
Amity OPEB Benchmark	-0.1	7.7	-0.1	18.4	10.1	9.7	8.0	9.3	6.5	
Difference	-0.2	0.8	-0.2	2.2	0.1	0.2	0.1	0.1	0.8	

**Calendar Year Performance Summary** 

	2020	2019	2018	2017	2016	2015	2014	2013
Amity OPEB	13.5	18.9	-5.0	14.2	6.8	0.2	4.5	15.5
Amity OPEB Benchmark	13.0	19.6	-5.0	14.1	7.6	-0.5	5.1	15.0
Difference	0.5	-0.7	0.0	0.1	-0.8	0.7	-0.6	0.5

# **Manager Performance Overview**

## Amity OPEB

## As of September 30, 2021

	QTD	YTD	1 Year	3 Years	5 Years	7 Years	10 Years	Since Inception	Inception Date
Short Term Liquidity									
Wells Fargo Government Money Market Fund I	0.0	0.0	0.0	1.0	1.0	0.7	0.5	0.6	12/01/2007
90 Day U.S. Treasury Bill	0.0	0.0	0.1	1.2	1.2	0.9	0.6	0.6	,,,
Fixed Income	0.3	1.3	3.9	5.2	3.2	2.9	2.4	3.5	01/01/2009
Fixed Income Composite Benchmark	0.4	-0.2	0.7	5.2	3.0	2.8	2.4	3.7	
Vanguard Short Term Inflation Protection Adm	1.3 (86)	4.1 (27)	5.5 (45)	4.5 (91)	3.0 (85)	2.3 (86)	N/A	2.0 (85)	10/01/2013
Bloomberg US TIPS 0-5 Year Index	1.3	4.1	5.5	4.6	3.0	2.4	N/A	2.1	
IM U.S. TIPS (MF) Median	1.6	3.5	5.4	6.6	3.8	3.1	N/A	2.8	
Vanguard Total Bond Market Index Adm	0.1 (30)	-1.6 (73)	-0.9 (84)	5.4 (60)	2.9 (66)	3.2 (53)	N/A	2.8 (59)	09/01/2012
Blmbg. U.S. Aggregate Index	0.1	-1.6	-0.9	5.4	2.9	3.3	N/A	2.8	
IM U.S. Broad Market Core Fixed Income (MF) Median	0.0	-1.2	0.2	5.6	3.2	3.3	N/A	2.9	
BlackRock Strategic Income Opportunities K	-0.1 (67)	1.2 (50)	5.4 (43)	5.2 (19)	N/A	N/A	N/A	4.1 (20)	10/01/2017
Blmbg. U.S. Aggregate Index	0.1	-1.6	-0.9	5.4	N/A	N/A	N/A	3.7	
IM Alternative Credit Focus (MF) Median	0.1	1.2	5.0	4.0	N/A	N/A	N/A	3.1	
Domestic Equity	-0.2	15.5	33.7	15.3	16.3	13.6	16.3	15.1	01/01/2009
Domestic Equity Composite Benchmark	-0.2	15.3	33.5	15.1	16.2	13.6	16.4	15.2	
Vanguard 500 Index Adm	0.6 (26)	15.9 (35)	30.0 (41)	16.0 (33)	16.9 (27)	14.0 (17)	N/A	15.4 (19)	09/01/2012
S&P 500 Index	0.6	15.9	30.0	16.0	16.9	14.0	N/A	15.4	
IM U.S. Large Cap Core Equity (MF) Median	0.0	15.0	29.0	14.7	15.7	12.6	N/A	14.1	
Vanguard Small-Cap Index Adm	-2.6 (59)	13.3 (77)	44.1 (81)	12.0 (16)	14.0 (14)	12.0 (19)	N/A	13.8 (10)	09/01/2012
CRSP US Small Cap Spliced Index	-2.6	13.3	44.0	12.0	14.0	12.0	N/A	13.8	
IM U.S. Small Cap Core Equity (MF) Median	-2.3	17.3	49.9	9.1	11.8	10.4	N/A	12.1	

## **Manager Performance Overview**

## **Amity OPEB**

As of September 30, 2021

	QTD	YTD	1 Year	3 Years	5 Years	7 Years	10 Years	Since Inception	Inception Date
International Equity	-1.6	8.2	26.5	8.2	9.2	6.4	8.6	8.0	01/01/2009
International Equity Composite Benchmark	-1.1	8.6	27.2	8.1	9.2	6.1	8.5	8.2	
Vanguard Developed Markets Index Fund Adm	-1.6 (54)	8.2 (38)	26.5 (27)	8.2 (29)	9.2 (18)	6.4 (19)	N/A	8.2 (19)	09/01/2012
FTSE Developed ex US Spliced Index	-1.1	8.6	27.2	8.1	9.1	6.3	N/A	8.1	
IM International Multi-Cap Core Equity (MF) Median	-1.4	7.7	24.6	7.2	8.3	5.5	N/A	7.4	

The inception date expressed on the Manager Performance Overview page(s) represents the first day of the first full month following the purchase of the investment. Performance figures shown at the fund level begin on this inception date. Inception dates for asset class composites reflect the start date at which these returns could be calculated using historical and existing system capabilities and may vary from the inception dates of underlying component strategies. Composite performance includes all funds held in the composite since inception.

Returns are net of fees unless otherwise stated. Mutual fund performance stated above may differ slightly from the current share class's historical performance due to share class exchanges.

# Manager Investment Gain/Loss Summary Amity OPEB

	Market Value As of 07/01/2021	Net Flows	Return On Investment	Market Value As of 09/30/2021
Short Term Liquidity				
Wells Fargo Government Money Market Fund I	48,176	-726	1	47,451
Total Short Term Liquidity	48,176	<b>-726</b>	1	47,451
Fixed Income				
Vanguard Short Term Inflation Protection Adm	310,024	-	4,005	314,030
Vanguard Total Bond Market Index Adm	305,081	-	328	305,408
BlackRock Strategic Income Opportunities K	621,417	-	-317	621,100
Total Fixed Income	1,236,522	-	4,016	1,240,538
Domestic Equity				
Vanguard 500 Index Adm	1,029,930	-	5,879	1,035,809
Vanguard Small-Cap Index Adm	332,943	-	-8,720	324,223
Total Domestic Equity	1,362,873	-	-2,841	1,360,032
International Equity				
Vanguard Developed Markets Index Fund Adm	656,570	-	-10,265	646,305
Total International Equity	656,570	-	-10,265	646,305
Amity OPEB	3,304,141	-726	-9,089	3,294,326

# **Market Value and Flows Summary**

**Amity OPEB** 

Since Inception Ending September 30, 2021

Periods Ending	Beginning Market Value (\$)	Net Cash Flow (\$)	Gain/Loss (\$)	Ending Market Value (\$)	% Return
Dec-2007	-	-	-	503,165	N/A
Mar-2008	503,165	-	-20,366	482,800	-4.0
lun-2008	482,800	-	-3,927	478,872	-0.9
Sep-2008	478,872	300,763	-10,630	769,006	-1.3
Dec-2008	769,006	-	-3,356	765,650	-0.4
Mar-2009	765,650	-	-56,724	708,926	-7.4
un-2009	708,926	-306,395	79,763	482,294	11.1
ep-2009	482,294	419,352	53,677	955,323	9.7
Dec-2009	955,323	-	16,221	971,544	1.7
Mar-2010	971,544	-	17,233	988,777	1.8
un-2010	988,777	-137,439	-35,065	816,273	-3.5
Sep-2010	816,273	61,250	46,295	923,818	5.5
Dec-2010	923,818	183,750	38,153	1,145,721	3.7
Mar-2011	1,145,721	122,557	32,965	1,301,243	2.7
un-2011	1,301,243	-367,549	12,585	946,279	1.1
Sep-2011	946,279	376,753	-85,614	1,237,419	-8.1
Dec-2011	1,237,419	-	80,550	1,317,969	6.5
Mar-2012	1,317,969	-165	96,522	1,414,326	7.3
un-2012	1,414,326	-326,337	-31,383	1,056,606	-1.7
Sep-2012	1,056,606	393,700	53,993	1,504,298	4.4
Dec-2012	1,504,298	-663	26,940	1,530,575	1.8
Mar-2013	1,530,575	-665	80,911	1,610,821	5.3
un-2013	1,610,821	-666	-12,641	1,597,514	-0.8
Sep-2013	1,597,514	-395,012	83,008	1,285,510	5.3
Dec-2013	1,285,510	-615	64,184	1,349,079	5.0
Mar-2014	1,349,079	-650	17,817	1,366,246	1.3
un-2014	1,366,246	-128,041	44,117	1,282,323	3.4
Sep-2014	1,282,323	54,654	-22,090	1,314,887	-1.7
Dec-2014	1,314,887	-657	18,598	1,332,827	1.4
Mar-2015	1,332,827	-657	29,530	1,361,700	2.2

# **Market Value and Flows Summary**

**Amity OPEB** 

**Since Inception Ending September 30, 2021** 

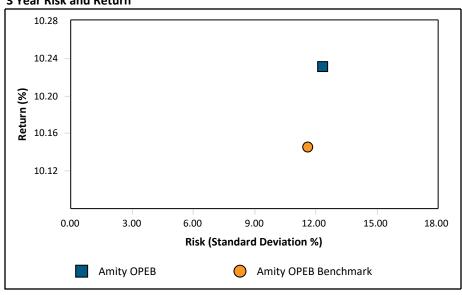
Periods Ending	Beginning Market Value (\$)	Net Cash Flow (\$)	Gain/Loss (\$)	Ending Market Value (\$)	% Return
Jun-2015	1,361,700	-9,018	-150	1,352,531	0.0
Sep-2015	1,352,531	174,338	-67,962	1,458,908	-4.8
Dec-2015	1,458,908	-665	42,569	1,500,812	2.9
Mar-2016	1,500,812	-664	15,299	1,515,446	1.0
Jun-2016	1,515,446	-666	25,883	1,540,664	1.7
Sep-2016	1,540,664	144,858	48,079	1,733,601	3.1
Dec-2016	1,733,601	-674	13,759	1,746,686	0.8
Mar-2017	1,746,686	-675	71,156	1,817,166	4.1
Jun-2017	1,817,166	148,290	47,542	2,012,998	2.6
Sep-2017	2,012,998	-685	63,889	2,076,202	3.2
Dec-2017	2,076,202	-687	75,817	2,151,333	3.7
Mar-2018	2,151,333	-688	-11,538	2,139,107	-0.5
Jun-2018	2,139,107	104,849	26,826	2,270,782	1.3
Sep-2018	2,270,782	-686	70,825	2,340,920	3.1
Dec-2018	2,340,920	-695	-200,517	2,139,708	-8.6
Mar-2019	2,139,708	-694	179,563	2,318,577	8.4
Jun-2019	2,318,577	62,214	76,168	2,456,959	3.2
Sep-2019	2,456,959	-667	15,682	2,471,974	0.6
Dec-2019	2,471,974	-707	139,110	2,610,377	5.6
Mar-2020	2,610,377	-656	-386,574	2,223,147	-14.8
Jun-2020	2,223,147	40,287	310,932	2,574,365	14.0
Sep-2020	2,574,365	-717	135,056	2,708,705	5.2
Dec-2020	2,708,705	-719	299,796	3,007,781	11.1
Mar-2021	3,007,781	-656	114,150	3,121,275	3.8
Jun-2021	3,121,275	30,947	151,919	3,304,141	4.9
Sep-2021	3,304,141	-726	-9,089	3,294,326	-0.3

## Risk vs. Return

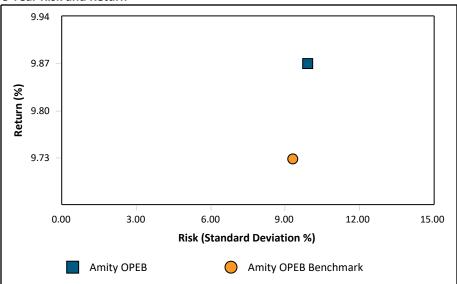
## **Amity OPEB**

## As of September 30, 2021

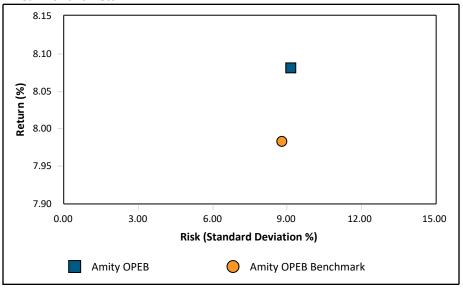
### 3 Year Risk and Return



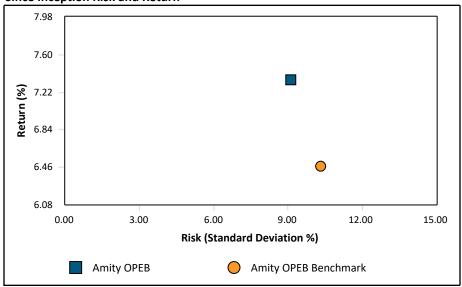
### 5 Year Risk and Return



### 7 Year Risk and Return



### **Since Inception Risk and Return**



## **MPT Statistics**

## **Amity OPEB**

## As of September 30, 2021

## **3 Year Historical MPT Statistics**

	Return	Standard Deviation	Downside Risk	Sharpe Ratio	Information Ratio	Tracking Error	R-Squared	Beta	Alpha
Amity OPEB	10.23	12.33	8.15	0.75	0.15	1.12	0.99	1.06	-0.45
Amity OPEB Benchmark	10.15	11.61	7.52	0.78	N/A	0.00	1.00	1.00	0.00
90 Day U.S. Treasury Bill	1.18	0.33	0.00	N/A	-0.78	11.73	0.14	-0.01	1.29

## **5 Year Historical MPT Statistics**

	Deviati	on Risk	Ratio	Ratio	Error	R-Squared	Beta	Alpha
Amity OPEB 9.8	7 9.90	6.49	0.88	0.20	0.94	0.99	1.06	-0.39
Amity OPEB Benchmark 9.7	9.32	6.00	0.91	N/A	0.00	1.00	1.00	0.00
90 Day U.S. Treasury Bill 1.1	.5 0.28	0.00	N/A	-0.91	9.41	0.11	-0.01	1.25

### 7 Year Historical MPT Statistics

		n Risk	Ratio	Ratio	Error	R-Squared	Beta	Alpha
Amity OPEB 8.08	9.16	5.90	0.80	0.15	0.87	0.99	1.04	-0.19
Amity OPEB Benchmark 7.98	8.77	5.54	0.82	N/A	0.00	1.00	1.00	0.00
90 Day U.S. Treasury Bill 0.85	0.27	0.01	N/A	-0.82	8.83	0.04	-0.01	0.91

## **Since Inception Historical MPT Statistics**

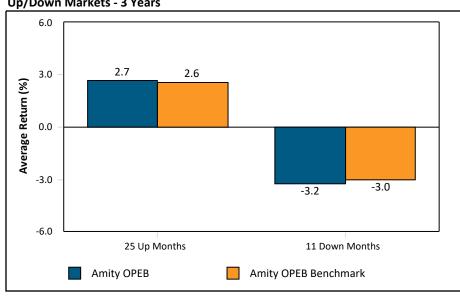
	Return	Standard Deviation	Downside Risk	Sharpe Ratio	Information Ratio	Tracking Error	R-Squared	Beta	Alpha	Inception Date
Amity OPEB	7.35	9.10	5.76	0.75	0.18	3.98	0.85	0.82	1.97	12/01/2007
Amity OPEB Benchmark	6.47	10.29	7.08	0.60	N/A	0.00	1.00	1.00	0.00	12/01/2007
90 Day U.S. Treasury Bill	0.64	0.28	0.01	N/A	-0.60	10.37	0.07	-0.01	0.69	12/01/2007

## **Market Capture Report**

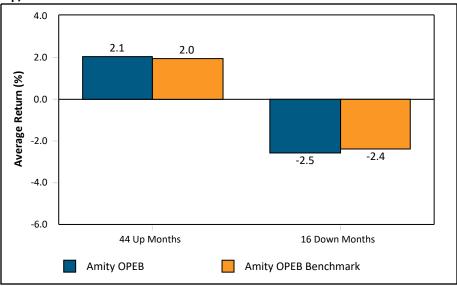
## **Amity OPEB**

## As of September 30, 2021

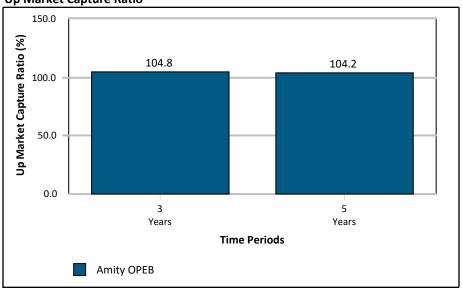
Up/Down Markets - 3 Years



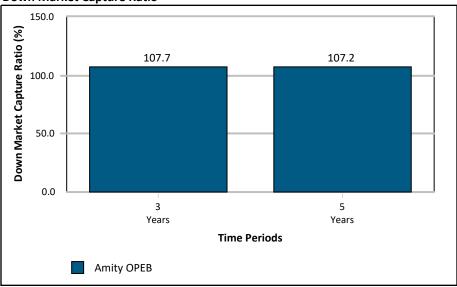




### **Up Market Capture Ratio**



### **Down Market Capture Ratio**



# **Estimated Fee Analysis**

## As of September 30, 2021

Manager	Current Target %	Fee Schedule
Vanguard Short Term Inflation Protection Adm	10.0%	0.06%
Vanguard Total Bond Market Index Adm	10.0%	0.05%
BlackRock Strategic Income Opportunities K	20.0%	0.76%
Vanguard 500 Index Adm	30.0%	0.04%
Vanguard Small Cap Index Adm	10.0%	0.05%
Vanguard Developed Markets Index Fund Adm	20.0%	0.07%
Weighted Average Investment Management Fee		0.19%

DISCLOSURE: The figures on this page have been obtained from sources we deem to be reliable, including Morningstar. Fiducient Advisors has not independently verified this information.

## **Asset Allocation**

## Amity Sick & Severance As of September 30, 2021

	Asset Allocation (\$)	Asset Allocation (%)	Target Allocation (%)	Differences (%)
Amity Sick & Severence	805,792	100.0	100.0	0.0
Short Term Liquidity	20,187	2.5	0.0	2.5
Wells Fargo Government Money Market Fund I	20,187	2.5	0.0	2.5
Fixed Income	397,500	49.3	50.0	-0.7
Vanguard Short-Term Government Bond Index Adm	177,377	22.0	22.5	-0.5
Vanguard Short Term Inflation Protection Adm	40,680	5.0	5.0	0.0
Vanguard Total Bond Market Index Adm	179,443	22.3	22.5	-0.2
Domestic Equity	305,501	37.9	40.0	-2.1
Vanguard Total Stock Market Index Adm	305,501	37.9	40.0	-2.1
International Equity	82,605	10.3	10.0	0.3
Vanguard Developed Markets Adm	82,605	10.3	10.0	0.3

## **Total Portfolio Performance Summary**

# Amity Sick & Severance As of September 30, 2021

**Account Reconciliation** 

QTR	YTD	Since Inception	Inception Date
			01/01/2007
827,856	774,400	897,135	
-21,907	-23,024	-784,736	
-157	54,416	693,394	
805,792	805,792	805,792	
	827,856 -21,907 -157	827,856 774,400 -21,907 -23,024 -157 54,416	827,856 774,400 897,135 -21,907 -23,024 -784,736 -157 54,416 693,394

**Amity Sick & Severance Benchmark Composition** 

Allocation Mandate	Weight (%)
Mar-2014	
Bloomberg U.S. TIPS Index	5.00
Bloomberg 1-3 Year Govt Index	22.50
Blmbg. U.S. Aggregate Index	22.50
CRSP U.S. Total Market TR Index	40.00
FTSE Developed ex US Spliced Index	10.00

**Trailing Performance Summary** 

	QTR	YTD	Jul-2021 To Sep-2021	1 Year	3 Years	5 Years	7 Years	10 Years	Since Inception	Inception Date
Amity Sick & Severence	0.0	7.0	0.0	15.9	9.9	9.4	7.8	8.7	6.6	01/01/2007
Amity Sick & Severance Benchmark	0.0	6.6	0.0	14.9	9.8	9.1	7.7	8.7	6.5	
Difference	0.0	0.4	0.0	1.0	0.1	0.3	0.1	0.0	0.1	

**Calendar Year Performance Summary** 

2020	2019	2018	2017	2016	2015	2014	2013
13.9	17.4	-3.1	12.2	6.1	0.3	6.0	14.5
13.1	17.5	-3.1	11.7	6.4	0.5	6.1	13.9
0.8	-0.1	0.0	0.5	-0.3	-0.2	-0.1	0.6
	<b>13.9</b> 13.1	<b>13.9 17.4</b> 13.1 17.5	<b>13.9 17.4 -3.1</b> 13.1 17.5 -3.1	13.9     17.4     -3.1     12.2       13.1     17.5     -3.1     11.7	13.9     17.4     -3.1     12.2     6.1       13.1     17.5     -3.1     11.7     6.4	13.9     17.4     -3.1     12.2     6.1     0.3       13.1     17.5     -3.1     11.7     6.4     0.5	13.9     17.4     -3.1     12.2     6.1     0.3     6.0       13.1     17.5     -3.1     11.7     6.4     0.5     6.1

# **Manager Performance Overview**

# Amity Sick & Severance As of September 30, 2021

	QTD	YTD	1 Year	3 Years	5 Years	7 Years	10 Years	Since Inception	Inception Date
Short Term Liquidity									
	0.0	0.0	0.0	0.9	0.9	0.7	0.5	0.8	01 /01 /2007
Wells Fargo Government Money Market Fund I	0.0					-			01/01/2007
90 Day U.S. Treasury Bill	0.0	0.0	0.1	1.2	1.2	0.9	0.6	0.9	
Fixed Income	0.2	-0.4	0.1	4.1	2.3	2.3	2.0	2.1	01/01/2009
Fixed Income Composite Benchmark	0.2	-0.4	0.1	4.4	2.5	2.5	2.2	2.4	
Vanguard Short-Term Government Bond Index Adm	0.0 (36)	-0.1 (34)	-0.1 (40)	2.6 (34)	1.6 (35)	1.4 (37)	N/A	1.1 (35)	09/01/2012
Bloomberg 1-3 Year Govt Index	0.1	0.0	0.0	2.7	1.6	1.5	1.2	1.2	
IM U.S. Short Term Treasury/Govt Bonds (MF) Median	0.0	-0.3	-0.2	2.4	1.4	1.3	1.0	1.0	
Vanguard Short Term Inflation Protection Adm	1.3 (86)	4.1 (27)	5.5 (45)	4.5 (91)	3.0 (85)	2.3 (86)	N/A	2.0 (85)	10/01/2013
Bloomberg US TIPS 0-5 Year Index	1.3	4.1	5.5	4.6	3.0	2.4	1.9	2.1	
IM U.S. TIPS (MF) Median	1.6	3.5	5.4	6.6	3.8	3.1	2.5	2.8	
Vanguard Total Bond Market Index Adm	0.1 (30)	-1.6 (73)	-0.9 (84)	5.4 (60)	2.9 (66)	3.2 (53)	N/A	2.8 (57)	08/01/2012
Blmbg. U.S. Aggregate Index	0.1	-1.6	-0.9	5.4	2.9	3.3	3.0	2.7	
IM U.S. Broad Market Core Fixed Income (MF) Median	0.0	-1.2	0.2	5.6	3.2	3.3	3.3	2.9	
Domestic Equity	-0.1	15.2	32.1	16.0	16.9	13.9	16.6	15.5	01/01/2009
Domestic Equity Composite Benchmark	-0.1	15.2	32.1	16.1	16.9	14.0	16.6	15.5	
Vanguard Total Stock Market Index Adm	-0.1 (43)	15.2 (46)	32.1 (40)	16.0 (19)	16.9 (17)	13.9 (8)	N/A	15.3 (14)	09/01/2012
CRSP US Total Market Spliced Index	-0.1	15.2	32.1	16.1	16.9	14.0	16.6	15.4	
IM U.S. Multi-Cap Core Equity (MF) Median	-0.2	15.0	30.9	13.4	14.7	11.7	15.0	13.9	

## **Manager Performance Overview**

# Amity Sick & Severance As of September 30, 2021

	QTD	YTD	1 Year	3 Years	5 Years	7 Years	10 Years	Since Inception	Inception Date
International Equity	-1.6	8.2	26.5	8.2	9.2	6.4	8.7	7.9	01/01/2009
International Equity Composite Benchmark	-1.1	8.6	27.2	8.1	9.1	6.3	8.4	8.1	
Vanguard Developed Markets Adm	-1.6 (54)	8.2 (38)	26.5 (27)	8.2 (29)	9.2 (18)	6.4 (18)	N/A	8.2 (19)	09/01/2012
FTSE Developed ex US Spliced Index	-1.1	8.6	27.2	8.1	9.1	6.3	8.4	8.1	
IM International Multi-Cap Core Equity (MF) Median	-1.4	7.7	24.6	7.2	8.3	5.5	7.9	7.4	

The inception date expressed on the Manager Performance Overview page(s) represents the first day of the first full month following the purchase of the investment. Performance figures shown at the fund level begin on this inception date. Inception dates for asset class composites reflect the start date at which these returns could be calculated using historical and existing system capabilities and may vary from the inception dates of underlying component strategies. Composite performance includes all funds held in the composite since inception.

Returns are net of fees unless otherwise stated. Mutual fund performance stated above may differ slightly from the current share class's historical performance due to share class exchanges.

# Manager Investment Gain/Loss Summary Amity Sick & Severance

	Market Value As of 07/01/2021	Net Flows	Return On Investment	Market Value As of 09/30/2021
Short Term Liquidity				
Wells Fargo Government Money Market Fund I	2,093	18,093	-	20,187
Total Short Term Liquidity	2,093	18,093	-	20,187
Fixed Income				
Vanguard Short-Term Government Bond Index Adm	177,334	-	42	177,377
Vanguard Short Term Inflation Protection Adm	40,161	-	519	40,680
Vanguard Total Bond Market Index Adm	179,250	-	192	179,443
Total Fixed Income	396,746	-	754	397,500
Domestic Equity				
Vanguard Total Stock Market Index Adm	345,100	-40,000	401	305,501
Total Domestic Equity	345,100	-40,000	401	305,501
nternational Equity				
Vanguard Developed Markets Adm	83,917	-	-1,312	82,605
Total International Equity	83,917	-	-1,312	82,605
Amity Sick & Severence	827,856	-21,907	-157	805,792

## **Market Value and Flows Summary**

Amity Sick & Severance

Since Inception Ending September 30, 2021

Periods Ending	Beginning Market Value (\$)	Net Cash Flow (\$)	Gain/Loss (\$)	Ending Market Value (\$)	% Return
Dec-2006	-	-	-	897,135	N/A
Mar-2007	897,135	-85,176	16,277	828,236	1.8
Jun-2007	828,236	85,103	22,664	936,003	2.7
Sep-2007	936,003	-1,250	25,016	959,769	2.7
Dec-2007	959,769	-1,250	1,696	960,215	0.2
Mar-2008	960,215	-1,250	-21,379	937,586	-2.2
Jun-2008	937,586	-24,586	-17,358	895,642	-1.9
Sep-2008	895,642	-1,260	-33,357	861,025	-3.7
Dec-2008	861,025	-1,250	-55,768	804,007	-6.5
Mar-2009	804,007	-1,250	-36,625	766,132	-4.6
Jun-2009	766,132	-190,578	33,279	608,833	4.5
Sep-2009	608,833	3,629	55,104	667,566	9.0
Dec-2009	667,566	-1,250	15,810	682,125	2.4
Mar-2010	682,125	-1,250	20,801	701,676	3.1
Jun-2010	701,676	-1,250	-36,542	663,884	-5.2
Sep-2010	663,884	41,888	46,933	752,706	6.9
Dec-2010	752,706	-1,250	37,200	788,655	4.9
Mar-2011	788,655	-1,156	24,415	811,914	3.1
Jun-2011	811,914	-225,111	394	587,197	1.1
Sep-2011	587,197	-4,138	-36,623	546,437	-6.3
Dec-2011	546,437	-1,250	26,614	571,801	4.9
Mar-2012	571,801	-584	31,420	602,636	5.5
Jun-2012	602,636	-584	-6,460	595,592	-1.1
Sep-2012	595,592	129,342	27,908	752,842	3.8
Dec-2012	752,842	-587	6,519	758,775	0.9
Mar-2013	758,775	-585	37,075	795,264	4.9
Jun-2013	795,264	-584	1,787	796,467	0.2
Sep-2013	796,467	-1,939	32,608	827,136	4.1
Dec-2013	827,136	-665	38,196	864,667	4.6
Mar-2014	864,667	-600	11,711	875,778	1.4

## **Market Value and Flows Summary**

Amity Sick & Severance

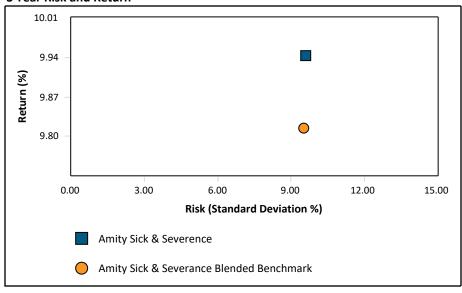
Since Inception Ending September 30, 2021

Periods Ending	Beginning Market Value (\$)	Net Cash Flow (\$)	Gain/Loss (\$)	Ending Market Value (\$)	% Return
Jun-2014	875,778	-194,883	26,184	707,080	3.1
Sep-2014	707,080	-654	-4,645	701,781	-0.7
Dec-2014	701,781	-593	14,622	715,810	2.1
Mar-2015	715,810	-593	12,324	727,541	1.7
Jun-2015	727,541	-592	-1,599	725,350	-0.2
Sep-2015	725,350	-603	-26,050	698,697	-3.6
Dec-2015	698,697	-585	17,450	715,562	2.5
Mar-2016	715,562	-586	8,114	723,090	1.1
lun-2016	723,090	-584	12,663	735,169	1.8
Sep-2016	735,169	-583	17,552	752,138	2.4
Dec-2016	752,138	-576	5,593	757,155	0.7
Mar-2017	757,155	-575	25,898	782,478	3.4
lun-2017	782,478	-573	17,197	799,101	2.2
Sep-2017	799,101	-565	21,789	820,325	2.7
Dec-2017	820,325	-564	27,233	846,994	3.3
Mar-2018	846,994	-562	-5,958	840,474	-0.7
lun-2018	840,474	-60,984	14,708	794,199	1.8
Sep-2018	794,199	-574	25,681	819,305	3.2
Dec-2018	819,305	-555	-58,183	760,568	-7.1
Mar-2019	760,568	-556	58,395	818,407	7.7
un-2019	818,407	-85,706	22,024	754,726	3.0
Sep-2019	754,726	-11,828	8,217	751,115	1.1
Dec-2019	751,115	-543	35,220	785,792	4.7
Mar-2020	785,792	-104,974	-63,097	617,722	-9.4
un-2020	617,722	-587	67,286	684,421	10.9
Sep-2020	684,421	-533	31,673	715,561	4.6
Dec-2020	715,561	-531	59,370	774,400	8.3
Mar-2021	774,400	-598	19,574	793,376	2.5
lun-2021	793,376	-519	34,999	827,856	4.4
Sep-2021	827,856	-21,907	-157	805,792	0.0

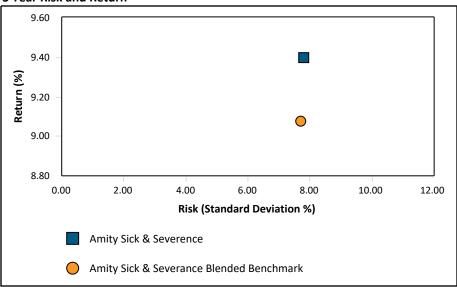
## Risk vs. Return

## Amity Sick & Severence As of September 30, 2021

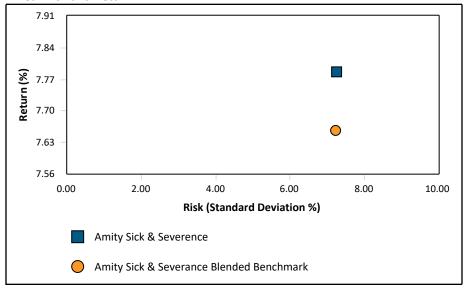
### 3 Year Risk and Return



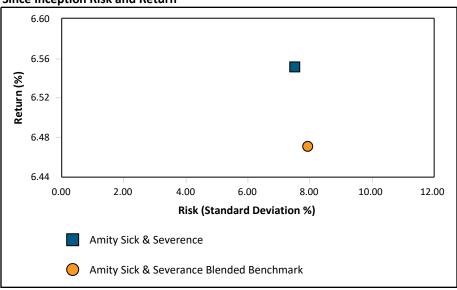
#### 5 Year Risk and Return



### 7 Year Risk and Return



### **Since Inception Risk and Return**



## **MPT Statistics**

## Amity Sick & Severence As of September 30, 2021

### **3 Year Historical MPT Statistics**

	Return	Standard Deviation	Downside Risk	Sharpe Ratio	Information Ratio	Tracking Error	R-Squared	Beta	Alpha
Amity Sick & Severence	9.94	9.61	5.97	0.90	0.19	0.66	1.00	1.01	0.06
Amity Sick & Severance Blended Benchmark	9.81	9.52	5.92	0.90	N/A	0.00	1.00	1.00	0.00
90 Day U.S. Treasury Bill	1.18	0.33	0.00	N/A	-0.90	9.64	0.12	-0.01	1.30

## **5 Year Historical MPT Statistics**

	Return	Standard Deviation	Downside Risk	Sharpe Ratio	Information Ratio	Tracking Error	R-Squared	Beta	Alpha
Amity Sick & Severence	9.40	7.80	4.80	1.04	0.52	0.58	0.99	1.01	0.19
Amity Sick & Severance Blended Benchmark	9.08	7.69	4.74	1.01	N/A	0.00	1.00	1.00	0.00
90 Day U.S. Treasury Bill	1.15	0.28	0.00	N/A	-1.01	7.77	0.09	-0.01	1.25
30 20, 0.0	2.25	0.20	0.00		2.02		0.03	0.01	2.20

### 7 Year Historical MPT Statistics

4.41						
4.41	0.95	0.23	0.54	0.99	1.00	0.10
4.37	0.94	N/A	0.00	1.00	1.00	0.00
0.01	N/A	-0.94	7.27	0.03	-0.01	0.91
			·	·	·	·

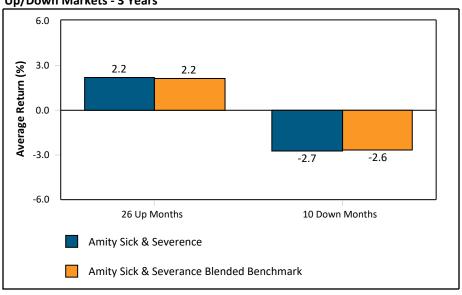
## **Since Inception Historical MPT Statistics**

	Return	Standard Deviation	Downside Risk	Sharpe Ratio	Information Ratio	Tracking Error	R-Squared	Beta	Alpha	Inception Date
Amity Sick & Severence	6.55	7.50	4.87	0.76	0.04	1.12	0.98	0.94	0.46	01/01/2007
Amity Sick & Severance Blended Benchmark	6.47	7.94	5.25	0.71	N/A	0.00	1.00	1.00	0.00	01/01/2007
90 Day U.S. Treasury Bill	0.91	0.41	0.01	N/A	-0.71	8.01	0.02	-0.01	0.96	01/01/2007
30 Buy 6.5. Treasury Bill	0.51	0.11	0.01	14//1	0.71	0.01	0.02	0.01	0.50	01/01/20

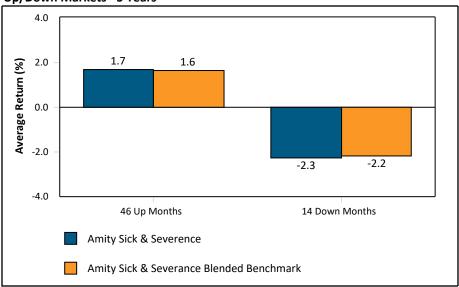
## **Market Capture Report**

## Amity Sick & Severence As of September 30, 2021

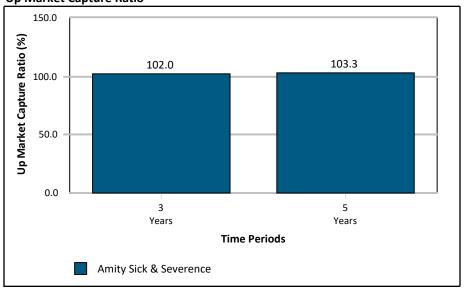




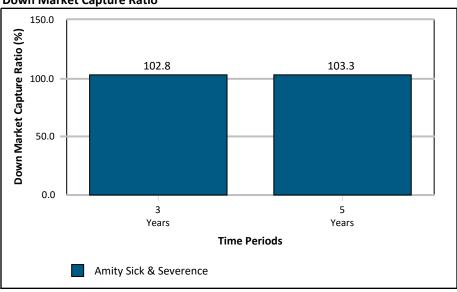
## **Up/Down Markets - 5 Years**



### **Up Market Capture Ratio**



### **Down Market Capture Ratio**



# **Estimated Fee Analysis**

## As of September 30, 2021

Manager	Current Target %	Fee Schedule
Vanguard Short-Term Government Bond Index Adm	22.5%	0.07%
Vanguard Total Bond Market Index Adm	22.5%	0.05%
Vanguard Short Term Inflation Protection Adm	5.0%	0.06%
Vanguard Total Stock Market Index Adm	40.0%	0.04%
Vanguard Developed Markets Adm	10.0%	0.07%
Weighted Average Investment Management Fee		0.05%

DISCLOSURE: The figures on this page have been obtained from sources we deem to be reliable, including Morningstar. Fiducient Advisors has not independently verified this information.

Section 4 Appendix

# AMITY REGIONAL HIGH SCHOOL DISTRICT No. 5

## **Pension Plan**

## COMPOSITE INVESTMENT POLICY STATEMENT AND ASSET ALLOCATION

November 10, 2015

### **INTRODUCTION & PURPOSE**

The AMITY REGIONAL HIGH SCHOOL DISTRICT No. 5 PENSION Plan for non-certified employees has been established to provide retirement benefits for current and former employees. The purpose of this Investment Policy Statement is to clearly articulate the Amity Board of Education's views on the Plan's investment objectives and risk tolerance. This Statement will also establish a target asset allocation and performance benchmark that will be used to monitor performance. This statement does not constitute a contract or a statement of mandatory requirements, but is instead an explanation of the general principles established for overseeing the Plan. The Amity Board of Education will determine the weighting to be given to each of these principles and may consider factors in addition to those described in these guidelines.

### ASSIGNMENT OF RESPONSIBILITIES

**Board of Education** - The Amity Board of Education is charged with the responsibility for the management of the assets of the Plan. The Amity Board of Education shall discharge its duties solely in the interest of Plan participants, with the care, skill, prudence and diligence under the circumstances then prevailing.

**Investment Manager**(s) - Each Investment Manager will have full discretion to make all investments placed under its jurisdiction, while observing and operating within all policies, guidelines, and constraints as detailed in the attached Appendix, consisting of individual manager investment policy statements or mutual fund prospectuses, as applicable. Specific responsibilities of each Investment Manager include reporting, on a timely basis, quarterly investment performance results, and informing the Amity Board of Education regarding any qualitative change to investment management organization, i.e. changes in portfolio management personnel, ownership changes, investment philosophy, etc.

*Investment Consultant* - The Investment Consultant's role is that of a non-discretionary advisor to the Amity Board of Education and the Plan. The Investment Consultant will assist in the development and periodic review of an Investment Policy Statement, conducting manager searches, monitoring the performance of the Investment Managers, communicating matters of policy, manager research, and manager performance.

Custodian - The Custodian shall be responsible for the safekeeping and custody of assets. The Custodian will physically (or through agreement with a sub-custodian) maintain possession of securities owned by the Plan, collect dividends and interest payments, redeem maturing securities, and effect receipt and delivery following purchases and sales. The Custodian may also perform regular accounting of all assets owned, purchased, or sold, as well as movement of assets into and out of the Plan accounts.

### **INVESTMENT OBJECTIVES**

The objectives of the Plan have been established after a comprehensive review of current and projected financial requirements, market returns, and risks and any special requirements of the AMITY REGIONAL HIGH SCHOOL DISTRICT No. 5 PENSION Plan. The Amity Board of Education will address these objectives in periodic reviews of the Plan's performance.

The Plans have both absolute and relative investment objectives.

### Absolute objectives:

- A long-term objective is to achieve growth in the principal value of assets while maintaining a level of stability and liquidity sufficient to ensure the timely payment of the plans' obligations.
- Achieve the target rate of return as defined by the actuarial rate of return, over a full market cycle, defined as approximately 5 to 7 years.

### Relative Objectives

- Perform in line with the target asset mix.
- Exceed the 50<sup>th</sup> percentile return of a universe comprised of funds or managers with similar objectives and/or styles over time.

Consistent with the diversification objectives of the portfolio, the Investment Policy is based on the assumption that the volatility of the portfolios will be similar to that of the target policy.

The investment goals above are the objectives of the aggregate Plan, and are not meant to be imposed on each investment manager. Each individual investment manager shall be subject to either a specific investment policy statement for separate account mandates, or the prospectus for mutual funds. These individual investment policy statements and/or prospectus are attached in the Appendix.

### ASSET ALLOCATION

The asset allocation target ranges set forth below represent a long-term view. Short-term market volatility may cause the asset mix to fall outside the targeted range. The target allocation may change should the Amity Board of Education, at its discretion, decide to change the mix of invested assets.

Target Asset Allocation Table						
Asset Class	Min. Weight	Target Weight	Max. Weight	Benchmark		
Fixed Income	20%	35%	50%	Barclays Aggregate Index		
Domestic Equity (Broad)	5%	10%	15%	S&P 500		
Domestic Equity (Large Value)	10%	15%	20%	CRSP US LCV TR Index		
Domestic Equity (Large Growth)	10%	15%	20%	CRSP US LCG TR Index		
Domestic Equity (Mid Cap)	0%	5%	10%	CRSP US MC TR Index		
Domestic Equity (Small Cap)	0%	5%	10%	CRSP US SM TR Index		
International Equity	5%	15%	25%	FTSE Developed ex NA Spliced Index		

The Plan's target policy benchmark shall be a weighted composite of market indices of the target allocation stated above.

Given the volatility of the capital markets, strategic adjustments in various asset classes may be required to rebalance asset allocation back to its target policy. Such adjustments should be executed so as to minimize excessive turnover and transaction costs. The Amity Board of Education will review actual asset allocation versus target asset allocation periodically to assess the need for portfolio rebalancing.

### **EVALUATION & REVIEW**

The Amity Board of Education will review performance on a periodic basis. The goal is for each individual investment manager to outperform an appropriate benchmark index and be in the top 50% of their style specific peer group over a full market cycle. Performance review will not only include the examination of investment returns, but the risk assumed to achieve those returns. At its discretion, the Amity Board of Education may replace managers for performance or other reasons other than performance (e.g. change in management or philosophy) that, in its estimation, hinders the firms ability to meet its investment objectives.

### **ADOPTION**

This Investment Policy Statement is made effective by the Amity Board of Education on November 10, 2015.

# AMITY REGIONAL SCHOOL DISTRICT No. 5 GASB 45 – OPEB

## COMPOSITE INVESTMENT POLICY STATEMENT AND ASSET ALLOCATION

**November 10, 2015** 

### **INTRODUCTION & PURPOSE**

The AMITY REGIONAL SCHOOL DISTRICT NO. 5 OPEB Plan has been established to provide post-retirement benefits for those individuals eligible to receive them. The purpose of this Investment Policy Statement is to clearly articulate the Amity Board of Education's views on the Plan's investment objectives and risk tolerance. This Statement will also establish a target asset allocation and performance benchmark that will be used to monitor performance. This statement does not constitute a contract or a statement of mandatory requirements, but is instead an explanation of the general principles established for overseeing the Plan. The Amity Board of Education will determine the weighting to be given to each of these principles and may consider factors in addition to those described in these guidelines.

### ASSIGNMENT OF RESPONSIBILITIES

**Board of Education** - The Amity Board of Education is charged with the responsibility for the management of the assets of the Plan. The Amity Board of Education shall discharge its duties solely in the interest of Plan participants, with the care, skill, prudence and diligence under the circumstances then prevailing.

**Investment Manager**(s) - Each Investment Manager will have full discretion to make all investments placed under its jurisdiction, while observing and operating within all policies, guidelines, and constraints as detailed in the attached Appendix, consisting of individual manager investment policy statements or mutual fund prospectuses, as applicable. Specific responsibilities of each Investment Manager include reporting, on a timely basis, quarterly investment performance results, and informing the Amity Board of Education regarding any qualitative change to investment management organization, i.e. changes in portfolio management personnel, ownership changes, investment philosophy, etc.

*Investment Consultant* - The Investment Consultant's role is that of a non-discretionary advisor to the Amity Board of Education and the Plan. The Investment Consultant will assist in the development and periodic review of an Investment Policy Statement, conducting manager searches, monitoring the performance of the Investment Managers, communicating matters of policy, manager research, and manager performance.

Custodian - The Custodian shall be responsible for the safekeeping and custody of assets. The Custodian will physically (or through agreement with a sub-custodian) maintain possession of securities owned by the Plan, collect dividends and interest payments, redeem maturing securities, and effect receipt and delivery following purchases and sales. The Custodian may also perform regular accounting of all assets owned, purchased, or sold, as well as movement of assets into and out of the Plan accounts.

### **INVESTMENT OBJECTIVES**

The objectives of the Plan have been established after a comprehensive review of current and projected financial requirements, market returns, and risks and any special requirements of the AMITY REGIONAL SCHOOL DISTRICT NO. 5 OPEB Plan. The Amity Board of Education will address these objectives in periodic reviews of the Plan's performance.

The Plans have both absolute and relative investment objectives.

### Absolute objectives:

- A long-term objective is to achieve growth in the principal value of assets while maintaining
  a level of stability and liquidity sufficient to ensure the timely payment of the plans'
  obligations.
- Achieve the target rate of return as defined by the actuarial rate of return, over a full market cycle, defined as approximately 5 to 7 years.

### Relative Objectives

- Perform in line with the target asset mix.
- Exceed the 50<sup>th</sup> percentile return of a universe comprised of funds or managers with similar objectives and/or styles over time.

Consistent with the diversification objectives of the portfolio, the Investment Policy is based on the assumption that the volatility of the portfolios will be similar to that of the target policy.

The investment goals above are the objectives of the aggregate Plan, and are not meant to be imposed on each investment manager. Each individual investment manager shall be subject to either a specific investment policy statement for separate account mandates, or the prospectus for mutual funds. These individual investment policy statements and/or prospectus are attached in the Appendix.

### ASSET ALLOCATION

The asset allocation target ranges set forth below represent a long-term view. Short-term market volatility may cause the asset mix to fall outside the targeted range. The target allocation may change should the Amity Board of Education, at its discretion, decide to change the mix of invested assets.

Target Asset Allocation Table						
Asset Class	Min. Weight	Target Weight	Max. Weight	Benchmark		
Fixed Income	10%	20%	30%	Barclays Aggregate Index		
Inflation Protection	10%	20%	30%	Barclays US Treasury US		
Fixed Income				TIPS Index		
Domestic Equity Large	30%	30%	60%	S&P 500		
Domestic Equity Small	0%	10%	20%	CRSP US Small Cap TR		
				Index		
International Equity	5%	20%	40%	FTSE Developed ex NA		
				Spliced Index		

The Plan's target policy benchmark shall be a weighted composite of market indices of the target allocation stated above.

Given the volatility of the capital markets, strategic adjustments in various asset classes may be required to rebalance asset allocation back to its target policy. Such adjustments should be executed so as to minimize excessive turnover and transaction costs. The Amity Board of Education will review actual asset allocation versus target asset allocation periodically to assess the need for portfolio rebalancing.

### **EVALUATION & REVIEW**

The Amity Board of Education will review performance on a periodic basis. The goal is for each individual investment manager to outperform an appropriate benchmark index and be in the top 50% of their style specific peer group over a full market cycle. Performance review will not only include the examination of investment returns, but the risk assumed to achieve those returns. At its discretion, the Amity Board of Education may replace managers for performance or other reasons other than performance (e.g. change in management or philosophy) that, in its estimation, hinders the firms ability to meet its investment objectives.

### **ADOPTION**

This Investment Policy Statement is made effective by the Amity Board of Education on November 10, 2015.

## AMITY REGIONAL SCHOOL DISTRICT No. 5 SICK & SEVERANCE

### COMPOSITE INVESTMENT POLICY STATEMENT AND ASSET ALLOCATION

**November 10, 2015** 

#### **INTRODUCTION & PURPOSE**

The AMITY REGIONAL SCHOOL DISTRICT NO. 5 SICK & SEVERANCE Plan has been established to provide retirement benefits for current and former employees. The purpose of this Investment Policy Statement is to clearly articulate the Amity Board of Education's views on the Plan's investment objectives and risk tolerance. This Statement will also establish a target asset allocation and performance benchmark that will be used to monitor performance. This statement does not constitute a contract or a statement of mandatory requirements, but is instead an explanation of the general principles established for overseeing the Plan. The Amity Board of Education will determine the weighting to be given to each of these principles and may consider factors in addition to those described in these guidelines.

#### ASSIGNMENT OF RESPONSIBILITIES

**Board of Education** - The Amity Board of Education is charged with the responsibility for the management of the assets of the Plan. The Amity Board of Education shall discharge its duties solely in the interest of Plan participants, with the care, skill, prudence and diligence under the circumstances then prevailing.

**Investment Manager**(s) - Each Investment Manager will have full discretion to make all investments placed under its jurisdiction, while observing and operating within all policies, guidelines, and constraints as detailed in the attached Appendix, consisting of individual manager investment policy statements or mutual fund prospectuses, as applicable. Specific responsibilities of each Investment Manager include reporting, on a timely basis, quarterly investment performance results, and informing the Amity Board of Education regarding any qualitative change to investment management organization, i.e. changes in portfolio management personnel, ownership changes, investment philosophy, etc.

*Investment Consultant* - The Investment Consultant's role is that of a non-discretionary advisor to the Amity Board of Education and the Plan. The Investment Consultant will assist in the development and periodic review of an Investment Policy Statement, conducting manager searches, monitoring the performance of the Investment Managers, communicating matters of policy, manager research, and manager performance.

Custodian - The Custodian shall be responsible for the safekeeping and custody of assets. The Custodian will physically (or through agreement with a sub-custodian) maintain possession of securities owned by the Plan, collect dividends and interest payments, redeem maturing securities, and effect receipt and delivery following purchases and sales. The Custodian may also perform regular accounting of all assets owned, purchased, or sold, as well as movement of assets into and out of the Plan accounts.

#### **INVESTMENT OBJECTIVES**

The objectives of the Plan have been established after a comprehensive review of current and projected financial requirements, market returns, and risks and any special requirements of the AMITY REGIONAL SCHOOL DISTRICT NO. 5 SICK & SEVERANCE Plan. The Amity Board of Education will address these objectives in periodic reviews of the Plan's performance.

The Plans have both absolute and relative investment objectives.

#### Absolute objectives:

- A long-term objective is to achieve growth in the principal value of assets while maintaining
  a level of stability and liquidity sufficient to ensure the timely payment of the plans'
  obligations.
- Achieve the target rate of return as defined by the actuarial rate of return, over a full market cycle, defined as approximately 5 to 7 years.

#### Relative Objectives

- Perform in line with the target asset mix.
- Exceed the 50<sup>th</sup> percentile return of a universe comprised of funds or managers with similar objectives and/or styles over time.

Consistent with the diversification objectives of the portfolio, the Investment Policy is based on the assumption that the volatility of the portfolios will be similar to that of the target policy.

The investment goals above are the objectives of the aggregate Plan, and are not meant to be imposed on each investment manager. Each individual investment manager shall be subject to either a specific investment policy statement for separate account mandates, or the prospectus for mutual funds. These individual investment policy statements and/or prospectus are attached in the Appendix.

#### ASSET ALLOCATION

The asset allocation target ranges set forth below represent a long-term view. Short-term market volatility may cause the asset mix to fall outside the targeted range. The target allocation may change should the Amity Board of Education, at its discretion, decide to change the mix of invested assets.

Target Asset Allocation Table				
Asset Class	Min. Weight	Target Weight	Max. Weight	Benchmark
Inflation Protection	0%	5%	10%	Barclays US Treasury US
Fixed Income				TIPS Index
Short-Term Gov't Bond	10%	22.5%	30%	Barclays 1-3 Govt
Fixed Income	10%	22.5%	30%	Barclays Aggregate Index
Domestic Equity	30%	40%	60%	CRSP US Total Market TR
				Index
International Equity	5%	10%	40%	FTSE Developed ex NA
				Spliced Index

The Plan's target policy benchmark shall be a weighted composite of market indices of the target allocation stated above.

Given the volatility of the capital markets, strategic adjustments in various asset classes may be required to rebalance asset allocation back to its target policy. Such adjustments should be executed so as to minimize excessive turnover and transaction costs. The Amity Board of Education will review actual asset allocation versus target asset allocation periodically to assess the need for portfolio rebalancing.

#### **EVALUATION & REVIEW**

The Amity Board of Education will review performance on a periodic basis. The goal is for each individual investment manager to outperform an appropriate benchmark index and be in the top 50% of their style specific peer group over a full market cycle. Performance review will not only include the examination of investment returns, but the risk assumed to achieve those returns. At its discretion, the Amity Board of Education may replace managers for performance or other reasons other than performance (e.g. change in management or philosophy) that, in its estimation, hinders the firms ability to meet its investment objectives.

#### **ADOPTION**

This Investment Policy Statement is made effective by the Amity Board of Education on November 10, 2015.

# Benchmark Composition Amity OPEB Benchmark

## As of September 30, 2021

Allocation Mandate	Weight (%)	Allocation Mandate	Weight (%)
Oct-2017		Mar-1997	
Blmbg. U.S. Aggregate Index	30.0	Blmbg. U.S. Aggregate Index	20.0
Bloomberg US TIPS 0-5 Year Index	10.0	Bloomberg U.S. TIPS Index	20.0
S&P 500 Index	30.0	S&P 500 Index	30.0
CRSP U.S. Small Cap TR Index	10.0	Russell 2000 Index	10.0
FTSE Developed ex US Spliced Index	20.0	MSCI EAFE (Net) Index	20.0
Jan-2014			
Blmbg. U.S. Aggregate Index	20.0		
Bloomberg US TIPS 0-5 Year Index	20.0		
S&P 500 Index	30.0		
CRSP U.S. Small Cap TR Index	10.0		
FTSE Global All Cap ex US Spliced Index	20.0		
Sep-2013			
Blmbg. U.S. Aggregate Index	20.0		
Bloomberg US TIPS 0-5 Year Index	20.0		
S&P 500 Index	30.0		
MSCI US Small Cap 1750	10.0		
FTSE Developed ex US Spliced Index	20.0		
Jun-2013			
Blmbg. U.S. Aggregate Index	20.0		
Bloomberg U.S. TIPS Index	20.0		
S&P 500 Index	30.0		
MSCI US Small Cap 1750	10.0		
FTSE Developed ex US Spliced Index	20.0		
Sep-2012			
Blmbg. U.S. Aggregate Index	20.0		
Bloomberg U.S. TIPS Index	20.0		
S&P 500 Index	30.0		
MSCI US Small Cap 1750	10.0		
FTSE Developed ex US Spliced Index	20.0		

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## Benchmark Composition Amity OPEB Fixed Income Hybrid Composite As of September 30, 2021

Allocation Mandate	Weight (%)
Oct-2017	
Blmbg. U.S. Aggregate Index	75.0
Bloomberg US TIPS 0-5 Year Index	25.0
Sep-2013 Blmbg. U.S. Aggregate Index Bloomberg US TIPS 0-5 Year Index	50.0 50.0
Mar-1997 Blmbg. U.S. Aggregate Index	50.0
Bloomberg U.S. TIPS Index	50.0

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Benchmark Composition
Amity OPEB Domestic Equity Hybrid Composite As of September 30, 2021

Allocation Mandate	Weight (%)
Jan-2014	
S&P 500 Index	75.0
CRSP U.S. Small Cap TR Index	25.0
Sep-2012	
S&P 500 Index	75.0
MSCI US Small Cap 1750	25.0
Jun-1992	
S&P 500 Index	75.0
Russell 2000 Index	25.0

## **Benchmark Composition**

Amity OPEB International Equity Hybrid Composite
As of September 30, 2021

Allocation Mandate	Weight (%)
Oct-2017	
FTSE Developed ex US Spliced Index	100.0
Jan-2014	
FTSE Global All Cap ex US Spliced Index	100.0
Sep-2012	
FTSE Developed ex US Spliced Index	100.0
Jun-1992	
MSCI EAFE (Net) Index	100.0

# Benchmark Composition Amity Pension Benchmark

## As of September 30, 2021

Allocation Mandate	Weight (%)	Allocation Mandate	Weight (%)
Mar-2014		Feb-1978	
Blmbg. U.S. Aggregate Index	35.0	Blmbg. U.S. Aggregate Index	35.0
S&P 500 Index	10.0	S&P 500 Index	10.0
CRSP U.S. Large Cap Value TR Index	15.0	Russell 1000 Value Index	15.0
CRSP U.S. Large Cap Growth TR Index	15.0	Russell 1000 Growth Index	15.0
CRSP U.S. Mid Cap TR Index	5.0	Russell Midcap Index	5.0
CRSP U.S. Small Cap TR Index	5.0	Russell 2000 Index	5.0
FTSE Developed ex US Spliced Index	15.0	MSCI EAFE (Net) Index	15.0
Jun-2013			
Blmbg. U.S. Aggregate Index	35.0		
S&P 500 Index	10.0		
MSCI US Prime Market Value	15.0		
MSCI US Prime Market Growth	15.0		
MSCI US Mid Cap 450 Index	5.0		
MSCI US Small Cap 1750	5.0		
FTSE Developed ex US Spliced Index	15.0		
Sep-2012			
Blmbg. U.S. Aggregate Index	35.0		
S&P 500 Index	10.0		
MSCI US Prime Market Value	15.0		
MSCI US Prime Market Growth	15.0		
MSCI US Mid Cap 450 Index	5.0		
MSCI US Small Cap 1750	5.0		
FTSE Developed ex US Spliced Index	15.0		

## Benchmark Composition Amity Pension Domestic Equity Hybrid History As of September 30, 2021

Allocation Mandate	Weight (%)
Mar-2014	
S&P 500 Index	20.0
CRSP U.S. Large Cap Value TR Index	30.0
CRSP U.S. Large Cap Growth TR Index	30.0
CRSP U.S. Mid Cap TR Index	10.0
CRSP U.S. Small Cap TR Index	10.0
Sep-2012	
S&P 500 Index	20.0
MSCI US Prime Market Value	30.0
MSCI US Prime Market Growth	30.0
MSCI US Mid Cap 450 Index	10.0
MSCI US Small Cap 1750	10.0
Mar-1997	
S&P 500 Index	20.0
Russell 1000 Value Index	30.0
Russell 1000 Growth Index	30.0
Russell Midcap Index	10.0
Russell 2000 Index	10.0

Benchmark Composition

Amity Pension International Equity Hybrid Composite As of September 30, 2021

Allocation Mandate	Weight (%)
Sep-2012	
FTSE Developed ex US Spliced Index	100.0
Mar-1997	
MSCI EAFE (Net) Index	100.0

## Benchmark Composition Amity Sick & Severance Blended Benchmark As of September 30, 2021

Allocation Mandate	Weight (%)
Mar-2014	
Bloomberg U.S. TIPS Index	5.0
Bloomberg 1-3 Year Govt Index	22.5
Blmbg. U.S. Aggregate Index	22.5
CRSP U.S. Total Market TR Index	40.0
FTSE Developed ex US Spliced Index	10.0
Jun-2013	
Bloomberg U.S. TIPS Index	5.0
Bloomberg 1-3 Year Govt Index	22.5
Blmbg. U.S. Aggregate Index	22.5
MSCI US Broad Market Index	40.0
FTSE Developed ex US Spliced Index	10.0
Sep-2012	
Bloomberg U.S. TIPS Index	5.0
Bloomberg 1-3 Year Govt Index	22.5
Blmbg. U.S. Aggregate Index	22.5
MSCI US Broad Market Index	40.0
FTSE Developed ex US Spliced Index	10.0
Nov-2009	
Bloomberg U.S. TIPS Index	5.0
Bloomberg 1-3 Year Govt Index	22.5
Blmbg. U.S. Aggregate Index	22.5
Russell 3000 Index	40.0
MSCI EAFE (Net) Index	10.0
Mar-1997	
Bloomberg 1-3 Year Govt Index	22.5
Blmbg. U.S. Treasury: 7-10 Year	22.5
Bloomberg U.S. TIPS Index	5.0
Russell 3000 Index	40.0
MSCI EAFE (Net) Index	10.0

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Benchmark Composition
Amity S&S Fixed Income Hybrid Composite As of September 30, 2021

Allocation Mandate	Weight (%)
Nov-2009	
Bloomberg U.S. TIPS Index	10.0
Bloomberg 1-3 Year Govt Index	45.0
Blmbg. U.S. Aggregate Index	45.0
Mar-1997	
Bloomberg U.S. TIPS Index	10.0
Bloomberg 1-3 Year Govt Index	45.0
Blmbg. U.S. Treasury: 7-10 Year	45.0

Benchmark Composition

Amity S&S Domestic Equity Hybrid Composite As of September 30, 2021

Allocation Mandate	Weight (%)
Mar-2014 CRSP U.S. Total Market TR Index	100.0
Sep-2012 MSCI US Broad Market Index	100.0
Mar-1997 Russell 3000 Index	100.0

Benchmark Composition

Amity S&S International Equity Hybrid Composite As of September 30, 2021

Allocation Mandate	Weight (%)
Sep-2012	
FTSE Developed ex US Spliced Index	100.0
Mar-1997	
MSCI EAFE (Net) Index	100.0

## **Definitions & Disclosures**

Please note: Due to rounding methodologies of various data providers, certain returns in this report might differ slightly when compared to other sources

#### REGULATORY DISCLOSURES

Offer of ADV Part 2A: Rule 204-3 under the Investment Advisers Act of 1940 requires that we make an annual offer to clients to send them, without charge, a written disclosure statement meeting the requirements of such rule. We will be glad to send a copy of our ADV Part 2A to you upon your written request to compliance@fiducient.com.

#### ASSET CLASS REPRESENTATIONS

All material and information is intended for Fiducient Advisors L.L.C. business only. Any use or public dissemination outside firm business is prohibited. Information is obtained from a variety of sources which are believed though not guaranteed to be accurate. Any forecast represents future expectations and actual returns, volatilities and correlations will differ from forecasts. Past performance does not indicate future performance. This presentation does not represent a specific investment recommendation. Please consult with your advisor, attorney and accountant, as appropriate, regarding specific advice.

When referencing asset class returns or statistics, the following indices are used to represent those asset classes, unless otherwise notes. Each index is unmanaged and investors can not actually invest directly into an index:

TIPS: Bloomberg Barclays Global Inflation-Linked: U.S. TIPS Total Return Index Unhedged

Municipals 5-Year: Bloomberg Barclays Municipal Bond 5 Year (4-6) Total Return Index Unhedged USD

Core Bond: Bloomberg Barclays US Agg Total Return Value Unhedged USD

**High Yield Municipals:** Bloomberg Barclays Muni High Yield Total Return Index Value Unhedged USD **High Yield:** Bloomberg Barclays US Corporate High Yield Total Return Index Value Unhedged USD

Foreign Bond: Bloomberg Barclays Global Aggregate ex-USD Total Return Index Value USD (50/50 blend of hedged and unhedged)

EM Debt (unhedged): J.P. Morgan GBI-EM Global Diversified Composite Unhedged USD

U.S. Large Cap: S&P 500 Total Return Index
U.S. Small Cap: Russell 2000 Total Return Index

International Developed: MSCI EAFE Net Total Return USD Index
Emerging Markets: MSCI Emerging Markets Net Total Return USD Index

World: MSCI ACWI Net Total Return USD Index

U.S. Equity REITs: FTSE Nareit Equity REITs Total Return Index USD

**S&P Real Assets:** S&P Real Assets Total Return Index **Commodities:** Bloomberg Commodity Total Return Index

Hedge Funds: Hedge Fund Research HFRI Fund of Funds Composite Index

Balanced: 3% TIPS, 33% Core Bond, 4% High Yield, 2% Foreign Bond. 2% EM Debt (unhedged), 18% U.S. Large Cap, 6% U.S. Small Cap, 16% International, 8% Emerging Markets, 5% U.S. Equity REITS, 3% Commodities

U.S.: MSCI USA Net Total Return USD Index
China: MSCI CHINA Net Total Return USD Index
Japan: MSCI Japan Net Total Return USD Index
Germany: MSCI Germany Net Total Return USD Index

India: MSCI India Net Total Return USD Index

United Kingdom: MSCI UK Net Total Return USD Index France: MSCI France Net Total Return USD Index Italy: MSCI Italy Net Total Return USD Index Brazil: MSCI Brazil Net Total Return USD Index Canada: MSCI Canada Net Total Return USD Index

#### **INDEX DEFINITIONS**

- Citigroup 3 Month T-Bill measures monthly return equivalents of yield averages that are not marked to market. The Three-Month Treasury Bill Indexes consist of the last three three-month Treasury bill issues.
- Ryan 3 Yr. GIC is an arithmetic mean of market rates of \$1 million Guaranteed Interest Contracts held for three years.
- Bloomberg Barclays Treasury U.S. T-Bills-1-3 Month Index includes aged U.S. Treasury bills, notes and bonds with a remaining maturity from 1 up to (but not including) 3 months. It excludes zero coupon strips.
- Bloomberg Barclays Capital US Treasury Inflation Protected Securities Index consists of Inflation-Protection securities issued by the U.S. Treasury.
- Bloomberg Barclays Muni Index is a rules-based, market-value-weighted index engineered for the long-term tax-exempt bond market. Bonds must be rated investment-grade by at least two ratings agencies.
- Bloomberg Barclays Muni 1 Year Index is the 1-year (1-2) component of the Municipal Bond index.
- Bloomberg Barclays Muni 3 Year Index is the 3-year (2-4) component of the Municipal Bond index.
- Bloomberg Barclays Muni 5 Year Index is the 5-year (4-6) component of the Municipal Bond index.
- Bloomberg Barclays Muni 7 Year Index is the 7-year (6-8) component of the Municipal Bond index.
- Bloombag @atdays Intermediate U.S. Gov't/Credit is the Intermediate component of the U.S. Government/Credit index, which includes securities in the Government and Credit Indices. The Government of the U.S. Government/Credit index, which includes securities in the Government and Credit Indices. The Government of the U.S. corporate and foreign debentures and secured notes that meet specified maturity, liquidity, and quality requirements.

- Bloomberg Barclays U.S. Aggregate Index covers the U.S. investment grade fixed rate bond market, with index components for government and corporate securities, mortgage pass-through securities, and asset-backed securities.
- Bloomberg Barclays Global Aggregate ex. USD Indices represent a broad-based measure of the global investment-grade fixed income markets. The two major components of this index are the Pan-European Aggregate and the Asian-Pacific Aggregate Indices. The index also includes Eurodollar and Euro-Yen corporate bonds and Canadian government, agency and corporate securities.
- Bloomberg Barclays U.S. Corporate High Yield Index covers the universe of fixed rate, non-investment grade debt. Eurobonds and debt issues from countries designated as emerging markets (sovereign rating of Baa1/BBB+/BBB+ and below using the middle of Moody's, S&P, and Fitch) are excluded, but Canadian and global bonds (SEC registered) of issuers in non-EMG countries are included.
- JP Morgan Government Bond Index-Emerging Market (GBI-EM) Index is a comprehensive, global local emerging markets index, and consists of regularly traded, liquid fixed-rate, domestic currency government bonds to which international investors can gain exposure.
- The S&P 500 is a capitalization-weighted index of 500 stocks designed to measure performance of the broad domestic economy through changes in the aggregate market value of 500 stocks representing all major industries.
- The Dow Jones Industrial Index is a price-weighted average of 30 blue-chip stocks that are generally the leaders in their industry.
- The NASDAQ is a broad-based capitalization-weighted index of stocks in all three NASDAQ tiers: Global Select, Global Market and Capital Market.
- Russell 3000 is a market-cap-weighted index which consists of roughly 3,000 of the largest companies in the U.S. as determined by market capitalization. It represents nearly 98% of the investable U.S. equity market.
- Russell 1000 consists of the largest 1000 companies in the Russell 3000 Index.
- Russell 1000 Growth measures the performance of those Russell 1000 companies with higher P/B ratios and higher forecasted growth values.
- Russell 1000 Value measures the performance of those Russell 1000 companies with lower P/B ratios and lower forecasted growth values.
- Russell Mid Cap measures the performance of the 800 smallest companies in the Russell 1000 Index.
- Russell Mid Cap Growth measures the performance of those Russell Mid Cap companies with higher P/B ratios and higher forecasted growth values.
- Russell Mid Cap Value measures the performance of those Russell Mid Cap companies with lower P/B ratios and lower forecasted growth values.
- Russell 2000 consists of the 2,000 smallest U.S. companies in the Russell 3000 index.
- Russell 2000 Growth measures the performance of the Russell 2000 companies with higher P/B ratios and higher forecasted growth values.
- Russell 2000 Value measures the performance of those Russell 2000 companies with lower P/B ratios and lower forecasted growth values.
- Russell 2500 consists of the 2,500 smallest U.S. companies in the Russell 3000 index.
- Russell 2500 Growth measures the performance of the Russell 2500 companies with higher P/B ratios and higher forecasted growth values.
- Russell 2500 Value measures the performance of those Russell 2500 companies with lower P/B ratios and lower forecasted growth values.
- MSCI World captures large and mid-cap representation across 23 Developed Markets countries. With 1,645 constituents, the index covers approximately 85% of the free float-adjusted market capitalization in each country.
- MSCI ACWI (All Country World Index) ex. U.S. Index captures large and mid-cap representation across 22 of 23 Developed Markets countries (excluding the United States) and 23 Emerging Markets countries. With 1,859 constituents, the index covers approximately 85% of the global equity opportunity set outside the US.
- MSCI ACWI (All Country World Index) ex. U.S. Small Cap Index captures small cap representation across 22 of 23 Developed Markets countries (excluding the US) and 23 Emerging Markets countries. With 4,368 constituents, the index covers approximately 14% of the global equity opportunity set outside the US.
- MSCI EAFE is an equity index which captures large and mid-cap representation across Developed Markets countries around the world, excluding the US and Canada. With 930 constituents, the index covers approximately 85% of the free float-adjusted market capitalization in each country.
- MSCI EAFE Value captures large and mid-cap securities exhibiting overall value style characteristics across Developed Markets countries around the world, excluding the US and Canada. The value investment style characteristics for index construction are defined using three variables: book value to price, 12-month forward earnings to price and dividend yield. With 507 constituents, the index targets 50% coverage of the free float- adjusted market capitalization of the MSCI EAFE Index.
- MSCI EAFE Growth captures large and mid-cap securities exhibiting overall growth style characteristics across Developed Markets countries around the world, excluding the US and Canada. The growth investment style characteristics for index construction are defined using five variables: long-term forward EPS growth rate, short-term forward EPS growth rate, current internal growth rate and long-term historical EPS growth trend. With 542 constituents, the index targets 50% coverage of the free float-adjusted market capitalization of the MSCI EAFE Index.
- MSCI Emerging Markets captures large and mid-cap representation across 23 Emerging Markets countries. With 836 constituents, the index covers approximately 85% of the free-float adjusted market capitalization in each country.
- Consumer Price Index is a measure of prices paid by consumers for a market basket of consumer goods and services. The yearly (or monthly) growth rates represent the inflation rate.
- FTSE NAREIT Equity REITs Index contains all Equity REITs not designed as Timber REITs or Infrastructure REITs.
- S&P Developed World Property defines and measures the investable universe of publicly traded property companies domiciled in developed markets. The companies in the index are engaged in real estate related activities, such as property ownership, management, development, rental and investment.
- **S&P Developed World Property x U.S.** defines and measures the investable universe of publicly traded property companies domiciled in developed countries outside of the U.S. The companies included are engaged in real estate related activities, such as property ownership, management, development, rental and investment.
- Fund Specific Broad Real Asset Benchmarks:
  - DWS Real Assets: 30%: Dow Jones Brookfield Infrastructure Index, 30%: FTSE EPRA/NAREIT Developed Index,15%: Bloomberg Commodity Index, 15%: S&P Global Natural Resources Index, 10%: Barclays U.S. Treasury Inflation Notes Total Return Index
  - PIMCO Inflation Response Multi Asset Fund: 45% Barclays U.S. TIPS, 20% Bloomberg Commodity Index, 15% JP Morgan Emerging Local Markets Plus, 10% Dow Jones Select REIT, 10% Bloomberg Gold Subindex Total Return
  - **Principal Diversified Real Assets:** 35% BBgBarc U.S. Treasury TIPS Index, 20% S&P Global Infrastructure Index NTR, 20% S&P Global Natural Resources Index NTR, 15% Bloomberg Commodity Index, and 10% FTSE EPRA/NAREIT Developed Index NTR
  - Wellington Diversified Inflation H: 50% MSCI ACWI Commodity Producers Index, 25% Bloomberg Commodity Index, and 25% Bloomberg Barclays US TIPS 1 10 Year Index
- Bloomberg Commodity Index is calculated on an excess return basis and reflects commodity futures price movements. The index rebalances annually weighted 2/3 by trading volume and 1/3 by world production and weight-caps are applied at the commodity, sector and group level for diversification.
- HFRI Fund Weighted Composite Index is a global, equal-weighted index of over 2,000 single-manager funds that report to HFR Database. Constituent funds report monthly net of all fees performance in US Dollar and have a minimum of \$50 Million under management or a twelve (12) month track record of active performance. The HFRI Fund Weighted Composite Index does not include Funds of Hedge Funds.
- The Alerian MLP Index is the leading gauge of energy Master Limited Partnerships (MLPs). The float adjusted, capitalization-weighted index, whose constituents represent approximately 85% of total float-adjusted market capitalization, is disseminated real-time on a price-return basis (AMZ) and on a total-return basis.
- The Adjusted Aferian MLP Index is commensurate with 65% of the monthly returns of the Alerian MLP Index to incorporate the effect of deferred tax liabilities incurred by MLP entities.
- Cambridge Associates U.S. Private Equity Index is based on data compiled from more than 1,200 institutional-quality buyout, growth equity, private equity energy, and mezzanine funds formed between 1986 and 2015.

- Cambridge Associates U.S. Venture Capital Index is based on data compiled from over 1,600 institutional-quality venture capital funds formed between 1986 and 2015.
- Vanguard Spliced Bloomberg Barclays US1-5Yr Gov/Cr Flt Adj Index: Bloomberg Barclays U.S. 1–5 Year Government/Credit Bond Index through December 31, 2009; Bloomberg Barclays U.S. 1–5 Year Government/Credit Float Adjusted Index thereafter.
- Vanguard Spliced Bloomberg Barclays US5-10Yr Gov/Cr Flt Adj Index: Bloomberg Barclays U.S. 5–10 Year Government/Credit Bond Index through December 31, 2009; Bloomberg Barclays U.S. 5–10 Year Government/Credit Float Adjusted Index thereafter.
- Vanguard Spliced Bloomberg Barclays US Agg Flt Adj Index: Bloomberg Barclays U.S. Aggregate Bond Index through December 31, 2009; Bloomberg Barclays U.S. Aggregate Float Adjusted Index thereafter.
- Vanguard Spliced Bloomberg Barclays US Long Gov/Cr Flt Adj Index: Bloomberg Barclays U.S. Long Government/Credit Bond Index through December 31, 2009; Bloomberg Barclays U.S. Long Government/Credit Float Adjusted Index thereafter.
- Vanguard Balanced Composite Index: Made up of two unmanaged benchmarks, weighted 60% Dow Jones U.S. Total Stock Market Index (formerly the Dow Jones Wilshire 5000 Index) and 40% Bloomberg Barclays U.S. Aggregate Bond Index through May 31, 2005; 60% MSCI US Broad Market Index and 40% Bloomberg Barclays U.S. Aggregate Bond Index through December 31, 2009; 60% MSCI US Broad Market Index and 40% Bloomberg Barclays U.S. Aggregate Float Adjusted Index through January 14, 2013; and 60% CRSP US Total Market Index and 40% Bloomberg Barclays U.S. Aggregate Float Adjusted Index through January 14, 2013; and 60% CRSP US Total Market Index and 40% Bloomberg Barclays U.S. Aggregate Float Adjusted Index through January 14, 2013; and 60% CRSP US Total Market Index and 40% Bloomberg Barclays U.S. Aggregate Float Adjusted Index through January 14, 2013; and 60% CRSP US Total Market Index and 40% Bloomberg Barclays U.S. Aggregate Float Adjusted Index through January 14, 2013; and 60% CRSP US Total Market Index and 40% Bloomberg Barclays U.S. Aggregate Float Adjusted Index through January 14, 2013; and 60% CRSP US Total Market Index and 40% Bloomberg Barclays U.S. Aggregate Float Adjusted Index through January 14, 2013; and 60% CRSP US Total Market Index and 40% Bloomberg Barclays U.S. Aggregate Float Adjusted Index through January 14, 2013; and 60% CRSP US Total Market Index and 40% Bloomberg Barclays U.S. Aggregate Float Adjusted Index through January 14, 2013; and 60% CRSP US Total Market Index and 40% Bloomberg Barclays U.S. Aggregate Float Adjusted Index through January 14, 2013; and 60% CRSP US Total Market Index and 40% Bloomberg Barclays U.S. Aggregate Float Adjusted Index through January 14, 2013; and 60% CRSP US Total Market Index and 40% Bloomberg Barclays U.S. Aggregate Float Adjusted Index through January 14, 2013; and 60% CRSP US Total Market Index and 40% Bloomberg Barclays U.S. Aggregate Float Adjusted Index through January 14, 2013; and 60% CRSP US Total Market Index and 40% Bloomberg Barclays U.S. Aggregate Flo
- Vanguard Spliced Intermediate-TermTax-Exempt Index: Bloomberg Barclays 1–15 Year Municipal Bond Index.
- Vanguard Spliced Extended Market Index: Dow Jones Wilshire 4500 Index through June 17, 2005; S&P Transitional Completion Index through September 16, 2005; S&P Completion Index thereafter.
- Vanguard Spliced Value Index: S&P 500 Value Index (formerly the S&P 500/Barra Value Index) through May 16, 2003; MSCI US Prime Market Value Index through April 16, 2013; CRSP US Large Cap Value Index thereafter.
- Vanguard Spliced Large Cap Index: Consists of MSCI US Prime Market 750 Index through January 30, 2013, and the CRSP US Large Cap Index thereafter.
- Vanguard Spliced Growth Index: S&P 500 Growth Index (formerly the S&P 500/Barra Growth Index) through May 16, 2003; MSCI US Prime Market Growth Index through April 16, 2013; CRSP US Large Cap Growth Index thereafter.
- Vanguard Spliced Mid Cap Value Index: MSCI US Mid Cap Value Index through April 16, 2013; CRSP US Mid Cap Value Index thereafter.
- Vanguard Spliced Mid Cap Index: S&P MidCap 400 Index through May 16, 2003; the MSCI US Mid Cap 450 Index through January 30, 2013; and the CRSP US Mid Cap Index thereafter.
- Vanguard Spliced Mid Cap Growth Index: MSCI US Mid Cap Growth Index through April 16, 2013; CRSP US Mid Cap Growth Index thereafter.
- Vanguard Spliced Total Stock Market Index: Dow Jones U.S. Total Stock Market Index (formerly known as the Dow Jones Wilshire 5000 Index) through April 22, 2005; MSCI US Broad Market Index through June 2, 2013; and CRSP US Total Market Index thereafter.
- Vanguard Spliced Small Cap Value Index: SmallCap 600 Value Index (formerly the S&P SmallCap 600/Barra Value Index) through May 16, 2003; MSCI US Small Cap Value Index through April 16, 2013; CRSP US Small Cap Value Index thereafter.
- Vanguard Spliced Small Cap Index: Russell 2000 Index through May 16, 2003; the MSCI US Small Cap 1750 Index through January 30, 2013; and the CRSP US Small Cap Index thereafter.
- Vanguard Spliced Small Cap Growth Index: S&P SmallCap 600 Growth Index (formerly the S&P SmallCap 600/Barra Value Index) through May 16, 2003; MSCI US Small Cap Growth Index through April 16, 2013; CRSP US Small Cap Growth Index thereafter.
- Vanguard Spliced Total International Stock Index: Consists of the Total International Composite Index through August 31, 2006; the MSCI EAFE + Emerging Markets Index through December 15, 2010; the MSCI ACWI ex USA IMI Index through June 2, 2013; and FTSE Global All Cap ex US Index thereafter. Benchmark returns are adjusted for withholding taxes.
- Vanguard Spliced Developed Markets Index: MSCI EAFE Index through May 28, 2013; FTSE Developed ex North America Index through December 20, 2015; FTSE Developed All Cap ex US Transition Index through May 31, 2016: FTSE Developed All Cap ex US Index thereafter. Benchmark returns are adjusted for withholding taxes.
- Vanguard Spliced Emerging Markets Index: Select Emerging Markets Index through August 23, 2006; MSCI Emerging Markets Index through January 9, 2013; FTSE Emerging Transition Index through June 27, 2013; FTSE Emerging Index through November 1, 2015; and FTSE Emerging Markets All Cap China A Transition Index thereafter. Benchmark returns are adjusted for withholding taxes.
- Vanguard REIT Spliced Index: MSCI US REIT Index adjusted to include a 2% cash position (Lipper Money Market Average) through April 30, 2009; MSCI US REIT Index through January 31, 2018; MSCI US Investable Market Real Estate 25/50 Transition Index through July 24, 2018; MSCI US Investable Market Real Estate 25/50 Index thereafter.

#### Additional:

- Equity sector returns are calculated by Russell and MSCI for domestic and international markets, respectively. MSCI sector definitions correspond to the MSCI GICS® classification (Global Industry Classification System); Russell uses its own sector and industry classifications.
- MSCI country returns are calculated by MSCI and are free float-adjusted market capitalization indices that are designed to measure equity market performance in each specific country.
- Currency returns are calculated using Bloomberg's historical spot rate indices and are calculated using the U.S. dollar as the base currency.
- The Index of Leading Economic Indicators, calculated by The Conference Board, is used as a barometer of economic activity over a range of three to six months. The index is used to determine the direction and stability of the economy. The composite index of leading indicators, which is derived from 10 leading indicators, helps to signal turning points in the economy and forecast economic cycles. The leading indicators are the following: average weekly hours, average weekly initial claims, manufacturers' new orders, both consumer and non-defense capital goods, vendor performance, building permits, stock prices, money supply (M2), the interestrate spread and the index of consumer expectations.
- S&P Target Date Indexes are constructed using a survey method of current target date investments with \$100 million or more in assets under management. Allocations for each vintage are comprised of exchange-traded-funds that represent respective asset classes used in target date portfolios. The indexes are designed to represent a market consensus glide path.

#### **DEFINITION OF KEY STATISTICS AND TERMS**

- Returns: A percentage figure used when reporting historical average compounded rate of investment return. All returns are annualized if the period for which they are calculated exceeds one year.
- Universe Comparison: The universe compares the fund's returns to a group of other investment portfolios with similar investment strategies. The returns for the fund, the index and the universe percentiles are displayed. A percentile ranking of 1 is the best, while a percentile ranking of 100 is the worst. For example, a ranking of 50 indicates the fund outperformed half of the universe. A ranking of 25 indicates the fund was in the top 25% of the universe, outperforming 75%.
- Returns In Up/Down Markets: This measures how the fund performed in both up and down markets. The methodology is to segregate the performance for each time period into the quarters in which the market, as defined by the index, was positive and negative. Quarters with negative index returns are treated as down markets, and quarters with positive index returns are treated as up markets. Thus, in a 3 year or 12 quarter period, there might be 4 down quarters and 8 up quarters. A simple arithmetic average of returns is calculated for the fund and the index based on the up quarters. A simple arithmetic average of returns is calculated for the fund and the index based on the down quarters. The up market capture ratio is the ratio of the fund's return in up markets to the index. The down market capture ratio is the ratio of the fund's return in down market to the index. Ideally, the fund would have a greater up market capture ratio than down market capture ratio.

- Standard Deviation: Standard deviation is a statistical measure of the range of performance within which the total returns of a fund fall. When a fund has a high standard deviation, the range of performance is very wide, meaning there is a greater volatility. Approximately 68% of the time, the total return of any given fund will differ from the average total return by no more than plus or minus the standard deviation figure. Ninety-five percent of the time, a fund's total return will be within a range of plus or minus two times the standard deviation from the average total return. If the quarterly or monthly returns are all the same the standard deviation will be zero. The more they vary from one another, the higher the standard deviation. Standard deviation can be misleading as a risk indicator for funds with high total returns because large positive deviations will increase the standard deviation without a corresponding increase in the risk of the fund. While positive volatility is welcome, negative is not.
- R-Squared: This reflects the percentage of a fund's movements that are explained by movements in its benchmark index. An R-squared of 100 means that all movements of a fund are completely explained by movements in the index. Conversely, a low R-squared indicates very few of the fund's movements are explained by movements in the benchmark index. R-squared can also be used to ascertain the significance of a particular beta. Generally, a higher R-squared will indicate a more reliable beta figure. If the R-squared is lower, then the beta is less relevant to the fund's performance. A measure of diversification, R-squared indicates the extent to which fluctuations in portfolio returns are explained by market. An R-squared = 0.70 implies that 70% of the fluctuation in a portfolio's return is explained by the fluctuation in the market. In this instance, overweighting or underweighting of industry groups or individual securities is responsible for 30% of the fund's movement.
- **Beta**: This is a measure of a fund's market risk. The beta of the market is 1.00. Accordingly, a fund with a 1.10 beta is expected to perform 10% better than the market in up markets and 10% worse that the market in down markets. It is important to note, however, a low fund beta does not imply the fund has a low level of volatility; rather, a low beta means only that the fund's market-related risk is low. Because beta analyzes the market risk of a fund by showing how responsive the fund is to the market, its usefulness depends on the degree to which the markets determine the fund's total risk (indicated by R-squared).
- Alpha: The Alpha is the nonsystematic return, or the return that can't be attributed to the market. It can be thought of as how the <u>manager</u> performed if the market's return was zero. A <u>positive</u> alpha implies the manager added value to the return of the portfolio over that of the market. A <u>negative</u> alpha implies the manager did not contribute any value over the performance of the market.
- Sharpe Ratio: The Sharpe ratio is the excess return per unit of total risk as measured by standard deviation. Higher numbers are better, indicating more return for the level of risk experienced. The ratio is a fund's return minus the risk-free rate of return (30-day T-Bill rate) divided by the fund's standard deviation. The <a href="higher-the-Sharpe-ratio">higher-the-Sharpe-ratio</a>, the more reward you are receiving per unit of total risk. This measure can be used to rank the performance of mutual funds or other portfolios.
- Treynor Ratio: The Treynor ratio measures returns earned in excess of that which could have been earned on a riskless investment per each unit of market risk. The ratio relates excess return over the risk-free rate to the additional risk taken; however, systematic risk is used instead of total risk. The Treynor ratio is similar to the Sharpe ratio, except in the fact that it uses the beta to evaluate the returns rather than the standard deviation of portfolio returns. High values mean better return for risk taken.
- Tracking Error: Tracking error measures the volatility of the difference in annual returns between the manager and the index. This value is calculated by measuring the standard deviation of the difference between the manager and index returns. For example, a tracking error of +/- 5 would mean there is about a 68% chance (1 standard deviation event) that the manager's returns will fall within +/- 5% of the benchmark's annual return.
- Information Ratio: The information ratio is a measure of the consistency of excess return. This value is determined by taking the annualized excess return over a benchmark (style benchmark by default) and dividing it by the standard deviation of excess return.
- Consistency: Consistency shows the percent of the periods the fund has beaten the index and the percent of the periods the index has beat the fund. A high average for the fund (e.g., over 50) is desirable, indicating the fund has beaten the index frequently.
- **Downside Risk:** Downside risk is a measure similar to standard deviation but focuses only on the negative movements of the return series. It is calculated by taking the standard deviation of the negative quarterly set of returns. The higher the factor, the riskier the product.
- M-Squared: M-squared, or the Modigliani risk-adjusted performance measure is used to characterize how well a portfolio's return rewards an investor for the amount of risk taken, relative to that of some benchmark portfolio and to the risk-free rate.

#### **DEFINITION OF KEY PRIVATE EQUITY TERMS**

- PIC (Paid in Capital): The amount of committed capital that has been transferred from the limited partner to the general partner.
- TVPI (Total Value to Paid in Capital): Money returned to limited partners plus the fund's unrealized investments, divided by money paid-in to the partnership. The TVPI should equal RVPI plus DPI.
- DPI (Distribution to Paid In Capital): Money returned (distributions) to limited partners divided by money paid in to the partnership. Also called cash-on-cash multiple.
- RVPI (Residual Value to Paid In Capital): The value of a fund's unrealized investments divided by money paid-into the partnership.
- Internal rate of return (IRR): This is the most appropriate performance benchmark for private equity investments. It is a time-weighted return expressed as a percentage. IRR uses the present sum of cash drawdowns (money invested), the present value of distributions (money returned from investments) and the current value of unrealized investments and applies a discount.
- Commitment: Every investor in a private equity fund commits to investing a specified sum of money in the fund partnership over a specified period of time. The fund records this as the limited partnership's capital commitment. The sum of capital commitments is equal to the size of the fund.
- Capital Distribution: These are the returns that an investor in a private equity fund receives. It is the income and capital realized from investments less expenses and liabilities. Once a limited partner has had their cost of investment returned, further distributions are actual profit. The partnership agreement determines the timing of distributions to the limited partner. It will also determine how profits are divided among the limited partners and general partner.
- Carried Interest: The share of profits that the fund manager is due once it has returned the cost of investment to investors. Carried interest is normally expressed as a percentage of the total profits of the fund.
- **Co-Investment**: Co-Investments are minority investments made alongside a private equity investor in an LBO, a recapitalization, or an expansion capital transaction. It is a passive, non-controlling investment, as the private equity firm involved will typically exercise control and perform monitoring functions.
- General Partner (GP): This can refer to the top-ranking partners at a private equity firm as well as the firm managing the private equity fund.
- **GP Commitments:** It is normal practice for the GP managing a private equity fund to also make a financial commitment to the fund on the same basis as the LPs in the fund, and this is seen as an important factor driving the alignment of GP and LP interests. The historic benchmark for GP commitments has been 1% of the total fund size, but this is by no means universal, and many GPs commit significantly larger amounts. Furthermore, there has been a marked trend towards GPs making larger commitments to their funds over recent years.
- Leveraged Buy-Out (LBO): The acquisition of a company using debt and equity finance.
- Limited Partner (LP): Institutions or high-net-worth individuals/sophisticated investors that contribute capital to a private equity fund.
- Public Market Equivalent (PME): Performance measure used to evaluate performance relative to the market. It is calculated as the ratio of the discounted value of the LP's inflows divided by the discounted value of outflows, with the discounting performed using realized market returns.
- Primaries: An original investment vehicle that invests directly into a company or asset.

#### VALUATION POLICY

Fiducient Advisors does not engage an independent third-party pricing service to value securities. Our reports are generated using the security prices provided by custodians used by our clients. Our custodial pricing hierarchy is available upon request. If a client holds a security not reported by the first custodian within the hierarchy, the valuation is generated from the next custodian within the hierarchy, and so forth. Each custodian uses pricing services from outside vendors, where the vendors may generate nominally different prices. Therefore, this report can reflect minor valuation differences from those contained in a custodian's report. In rare instances where Fiducient Advisors overrides a custodial price, prices are taken from Bloomberg.

#### REPORTING POLICY

This report is intended for the exclusive use of the client listed within the report. Content is privileged and confidential. Any dissemination or distribution is strictly prohibited. Information has been obtained from a variety of sources believed to be reliable though not independently verified. Any forecast represents median expectations and actual returns, volatilities and correlations will differ from forecasts. Please note each client has customized investment objectives and constraints and the investment strategy for each portfolio is based on a client-specific asset allocation model. Past performance does not indicate future performance and there is a possibility of a loss. Performance calculated net of investment fees. Certain portfolios presented may be gross of Fiducient Advisors' fees and actual performance would be reduced by investment advisory fees. This report does not represent a specific investment recommendation. Please consult with your advisor, attorney, and accountant, as appropriate, regarding specific advice.

Custodian reports are the reports that govern the account. There will be different account values between Fiducient Advisors' reports and the custodian reports based on whether the report utilizes trade date or settlement date to calculate value. Additionally, difference between values contained on reports may be caused by different accrued income values. Any forecasts represent future expectations and actual returns, volatilities and correlations will differ from forecasts. This report does not represent a specific investment recommendation. Please consult with your advisor, attorney, and accountant, as appropriate, regarding specific advice. Past performance does not indicate future performance and there is a possibility of aloss.

Manager performance for mutual funds and ETFs is based on NAV and provided by Lipper. Performance for non-mutual fund or ETF investments is based on the returns provided by managers, calculations based on a manager statement, or calculations based on a statement or data from the client's custodian. Unless specified otherwise, all returns are net of individual manager fees, represent total returns and are annualized for periods greater than one year. The deduction of fees produces a compounding effect that reduces the total rate of return over time. As an example, the effect of investment management fees on the total value of a client's portfolio assuming (a) quarterly fee assessment, (b) \$1,000,000 investment, (c) portfolio return of 8% a year, and (d) 0.50% annual investment advisory fee would be \$5,228 in the first year, and cumulative effects of \$30,342 over five years and \$73,826 over ten years. Additional information on advisory fees charged by Fiducient Advisors are described in Part 2 of the Form ADV.

#### **OTHER**

By regulation, closed-end funds utilizing debt for leverage must report their interest expense, as well as their income tax expense, as part of their total expense ratio. To make for a useful comparison between closed-end funds and both open-end funds and exchange-traded funds, adjusted expense ratios excluding interest and income tax expenses are utilized for closed-end funds within this report. See disclosure on closed-end fund fact sheets for information regarding the total expense ratio of each closed-end fund.

Please advise us of any changes in your objectives or circumstances.

#### **CUSTODIAN STATEMENTS**

Please remember to review the periodic statements you receive from you custodian. If you do not receive periodic statements from your custodian or notice issues with the activity reported in those statements, please contact Fiducient Advisors or your custodian immediately.

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## AMITY REGIONAL HIGH SCHOOL DISTRICT No. 5

#### **Pension Plan**

### COMPOSITE INVESTMENT POLICY STATEMENT AND ASSET ALLOCATION

November 10, 2015

#### INTRODUCTION & PURPOSE

The AMITY REGIONAL HIGH SCHOOL DISTRICT No. 5 PENSION Plan for non-certified employees has been established to provide retirement benefits for current and former employees. The purpose of this Investment Policy Statement is to clearly articulate the Amity Board of Education's views on the Plan's investment objectives and risk tolerance. This Statement will also establish a target asset allocation and performance benchmark that will be used to monitor performance. This statement does not constitute a contract or a statement of mandatory requirements, but is instead an explanation of the general principles established for overseeing the Plan. The Amity Board of Education will determine the weighting to be given to each of these principles and may consider factors in addition to those described in these guidelines.

#### ASSIGNMENT OF RESPONSIBILITIES

**Board of Education** - The Amity Board of Education is charged with the responsibility for the management of the assets of the Plan. The Amity Board of Education shall discharge its duties solely in the interest of Plan participants, with the care, skill, prudence and diligence under the circumstances then prevailing.

**Investment Manager**(s) - Each Investment Manager will have full discretion to make all investments placed under its jurisdiction, while observing and operating within all policies, guidelines, and constraints as detailed in the attached Appendix, consisting of individual manager investment policy statements or mutual fund prospectuses, as applicable. Specific responsibilities of each Investment Manager include reporting, on a timely basis, quarterly investment performance results, and informing the Amity Board of Education regarding any qualitative change to investment management organization, i.e. changes in portfolio management personnel, ownership changes, investment philosophy, etc.

*Investment Consultant* - The Investment Consultant's role is that of a non-discretionary advisor to the Amity Board of Education and the Plan. The Investment Consultant will assist in the development and periodic review of an Investment Policy Statement, conducting manager searches, monitoring the performance of the Investment Managers, communicating matters of policy, manager research, and manager performance.

Custodian - The Custodian shall be responsible for the safekeeping and custody of assets. The Custodian will physically (or through agreement with a sub-custodian) maintain possession of securities owned by the Plan, collect dividends and interest payments, redeem maturing securities, and effect receipt and delivery following purchases and sales. The Custodian may also perform regular accounting of all assets owned, purchased, or sold, as well as movement of assets into and out of the Plan accounts.

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#### **INVESTMENT OBJECTIVES**

The objectives of the Plan have been established after a comprehensive review of current and projected financial requirements, market returns, and risks and any special requirements of the AMITY REGIONAL HIGH SCHOOL DISTRICT No. 5 PENSION Plan. The Amity Board of Education will address these objectives in periodic reviews of the Plan's performance.

The Plans have both absolute and relative investment objectives.

#### Absolute objectives:

- A long-term objective is to achieve growth in the principal value of assets while maintaining a level of stability and liquidity sufficient to ensure the timely payment of the plans' obligations.
- Achieve the target rate of return as defined by the actuarial rate of return, over a full market cycle, defined as approximately 5 to 7 years.

#### Relative Objectives

- Perform in line with the target asset mix.
- Exceed the 50<sup>th</sup> percentile return of a universe comprised of funds or managers with similar objectives and/or styles over time.

Consistent with the diversification objectives of the portfolio, the Investment Policy is based on the assumption that the volatility of the portfolios will be similar to that of the target policy.

The investment goals above are the objectives of the aggregate Plan, and are not meant to be imposed on each investment manager. Each individual investment manager shall be subject to either a specific investment policy statement for separate account mandates, or the prospectus for mutual funds. These individual investment policy statements and/or prospectus are attached in the Appendix.

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#### ASSET ALLOCATION

The asset allocation target ranges set forth below represent a long-term view. Short-term market volatility may cause the asset mix to fall outside the targeted range. The target allocation may change should the Amity Board of Education, at its discretion, decide to change the mix of invested assets.

Target Asset Allocation Table											
Asset Class	Min. Weight	Target Weight	Max. Weight	Benchmark							
Fixed Income	20%	35%	50%	Barclays Aggregate Index							
Domestic Equity (Broad)	5%	10%	15%	S&P 500							
Domestic Equity (Large Value)	10%	15%	20%	CRSP US LCV TR Index							
Domestic Equity (Large Growth)	10%	15%	20%	CRSP US LCG TR Index							
Domestic Equity (Mid Cap)	0%	5%	10%	CRSP US MC TR Index							
Domestic Equity (Small Cap)	0%	5%	10%	CRSP US SM TR Index							
International Equity	5%	15%	25%	FTSE Developed ex NA Spliced Index							

The Plan's target policy benchmark shall be a weighted composite of market indices of the target allocation stated above.

Given the volatility of the capital markets, strategic adjustments in various asset classes may be required to rebalance asset allocation back to its target policy. Such adjustments should be executed so as to minimize excessive turnover and transaction costs. The Amity Board of Education will review actual asset allocation versus target asset allocation periodically to assess the need for portfolio rebalancing.

#### **EVALUATION & REVIEW**

The Amity Board of Education will review performance on a periodic basis. The goal is for each individual investment manager to outperform an appropriate benchmark index and be in the top 50% of their style specific peer group over a full market cycle. Performance review will not only include the examination of investment returns, but the risk assumed to achieve those returns. At its discretion, the Amity Board of Education may replace managers for performance or other reasons other than performance (e.g. change in management or philosophy) that, in its estimation, hinders the firms ability to meet its investment objectives.

#### **ADOPTION**

This Investment Policy Statement is made effective by the Amity Board of Education on November 10, 2015.

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## AMITY REGIONAL SCHOOL DISTRICT No. 5 SICK & SEVERANCE

### COMPOSITE INVESTMENT POLICY STATEMENT AND ASSET ALLOCATION

**November 10, 2015** 

#### INTRODUCTION & PURPOSE

The AMITY REGIONAL SCHOOL DISTRICT NO. 5 SICK & SEVERANCE Plan has been established to provide retirement benefits for current and former employees. The purpose of this Investment Policy Statement is to clearly articulate the Amity Board of Education's views on the Plan's investment objectives and risk tolerance. This Statement will also establish a target asset allocation and performance benchmark that will be used to monitor performance. This statement does not constitute a contract or a statement of mandatory requirements, but is instead an explanation of the general principles established for overseeing the Plan. The Amity Board of Education will determine the weighting to be given to each of these principles and may consider factors in addition to those described in these guidelines.

#### ASSIGNMENT OF RESPONSIBILITIES

**Board of Education** - The Amity Board of Education is charged with the responsibility for the management of the assets of the Plan. The Amity Board of Education shall discharge its duties solely in the interest of Plan participants, with the care, skill, prudence and diligence under the circumstances then prevailing.

**Investment Manager**(s) - Each Investment Manager will have full discretion to make all investments placed under its jurisdiction, while observing and operating within all policies, guidelines, and constraints as detailed in the attached Appendix, consisting of individual manager investment policy statements or mutual fund prospectuses, as applicable. Specific responsibilities of each Investment Manager include reporting, on a timely basis, quarterly investment performance results, and informing the Amity Board of Education regarding any qualitative change to investment management organization, i.e. changes in portfolio management personnel, ownership changes, investment philosophy, etc.

*Investment Consultant* - The Investment Consultant's role is that of a non-discretionary advisor to the Amity Board of Education and the Plan. The Investment Consultant will assist in the development and periodic review of an Investment Policy Statement, conducting manager searches, monitoring the performance of the Investment Managers, communicating matters of policy, manager research, and manager performance.

Custodian - The Custodian shall be responsible for the safekeeping and custody of assets. The Custodian will physically (or through agreement with a sub-custodian) maintain possession of securities owned by the Plan, collect dividends and interest payments, redeem maturing securities, and effect receipt and delivery following purchases and sales. The Custodian may also perform regular accounting of all assets owned, purchased, or sold, as well as movement of assets into and out of the Plan accounts.

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#### **INVESTMENT OBJECTIVES**

The objectives of the Plan have been established after a comprehensive review of current and projected financial requirements, market returns, and risks and any special requirements of the AMITY REGIONAL SCHOOL DISTRICT NO. 5 SICK & SEVERANCE Plan. The Amity Board of Education will address these objectives in periodic reviews of the Plan's performance.

The Plans have both absolute and relative investment objectives.

#### Absolute objectives:

- A long-term objective is to achieve growth in the principal value of assets while maintaining a level of stability and liquidity sufficient to ensure the timely payment of the plans' obligations.
- Achieve the target rate of return as defined by the actuarial rate of return, over a full market cycle, defined as approximately 5 to 7 years.

#### Relative Objectives

- Perform in line with the target asset mix.
- Exceed the 50<sup>th</sup> percentile return of a universe comprised of funds or managers with similar objectives and/or styles over time.

Consistent with the diversification objectives of the portfolio, the Investment Policy is based on the assumption that the volatility of the portfolios will be similar to that of the target policy.

The investment goals above are the objectives of the aggregate Plan, and are not meant to be imposed on each investment manager. Each individual investment manager shall be subject to either a specific investment policy statement for separate account mandates, or the prospectus for mutual funds. These individual investment policy statements and/or prospectus are attached in the Appendix.

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#### ASSET ALLOCATION

The asset allocation target ranges set forth below represent a long-term view. Short-term market volatility may cause the asset mix to fall outside the targeted range. The target allocation may change should the Amity Board of Education, at its discretion, decide to change the mix of invested assets.

Target Asset Allocation Table											
Asset Class	Min. Weight Target Weight		Max. Weight	Benchmark							
Inflation Protection	0%	5%	10%	Barclays US Treasury US							
Fixed Income				TIPS Index							
Short-Term Gov't Bond	10%	22.5%	30%	Barclays 1-3 Govt							
Fixed Income	10%	22.5%	30%	Barclays Aggregate Index							
Domestic Equity	30%	40%	60%	CRSP US Total Market TR							
				Index							
International Equity	5%	10%	40%	FTSE Developed ex NA							
				Spliced Index							

The Plan's target policy benchmark shall be a weighted composite of market indices of the target allocation stated above.

Given the volatility of the capital markets, strategic adjustments in various asset classes may be required to rebalance asset allocation back to its target policy. Such adjustments should be executed so as to minimize excessive turnover and transaction costs. The Amity Board of Education will review actual asset allocation versus target asset allocation periodically to assess the need for portfolio rebalancing.

#### **EVALUATION & REVIEW**

The Amity Board of Education will review performance on a periodic basis. The goal is for each individual investment manager to outperform an appropriate benchmark index and be in the top 50% of their style specific peer group over a full market cycle. Performance review will not only include the examination of investment returns, but the risk assumed to achieve those returns. At its discretion, the Amity Board of Education may replace managers for performance or other reasons other than performance (e.g. change in management or philosophy) that, in its estimation, hinders the firms ability to meet its investment objectives.

#### **ADOPTION**

This Investment Policy Statement is made effective by the Amity Board of Education on November 10, 2015.

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# AMITY REGIONAL SCHOOL DISTRICT No. 5 GASB 45 – OPEB

### COMPOSITE INVESTMENT POLICY STATEMENT AND ASSET ALLOCATION

**November 10, 2015** 

#### INTRODUCTION & PURPOSE

The AMITY REGIONAL SCHOOL DISTRICT NO. 5 OPEB Plan has been established to provide post-retirement benefits for those individuals eligible to receive them. The purpose of this Investment Policy Statement is to clearly articulate the Amity Board of Education's views on the Plan's investment objectives and risk tolerance. This Statement will also establish a target asset allocation and performance benchmark that will be used to monitor performance. This statement does not constitute a contract or a statement of mandatory requirements, but is instead an explanation of the general principles established for overseeing the Plan. The Amity Board of Education will determine the weighting to be given to each of these principles and may consider factors in addition to those described in these guidelines.

#### ASSIGNMENT OF RESPONSIBILITIES

**Board of Education** - The Amity Board of Education is charged with the responsibility for the management of the assets of the Plan. The Amity Board of Education shall discharge its duties solely in the interest of Plan participants, with the care, skill, prudence and diligence under the circumstances then prevailing.

**Investment Manager**(s) - Each Investment Manager will have full discretion to make all investments placed under its jurisdiction, while observing and operating within all policies, guidelines, and constraints as detailed in the attached Appendix, consisting of individual manager investment policy statements or mutual fund prospectuses, as applicable. Specific responsibilities of each Investment Manager include reporting, on a timely basis, quarterly investment performance results, and informing the Amity Board of Education regarding any qualitative change to investment management organization, i.e. changes in portfolio management personnel, ownership changes, investment philosophy, etc.

*Investment Consultant* - The Investment Consultant's role is that of a non-discretionary advisor to the Amity Board of Education and the Plan. The Investment Consultant will assist in the development and periodic review of an Investment Policy Statement, conducting manager searches, monitoring the performance of the Investment Managers, communicating matters of policy, manager research, and manager performance.

Custodian - The Custodian shall be responsible for the safekeeping and custody of assets. The Custodian will physically (or through agreement with a sub-custodian) maintain possession of securities owned by the Plan, collect dividends and interest payments, redeem maturing securities, and effect receipt and delivery following purchases and sales. The Custodian may also perform regular accounting of all assets owned, purchased, or sold, as well as movement of assets into and out of the Plan accounts.

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#### **INVESTMENT OBJECTIVES**

The objectives of the Plan have been established after a comprehensive review of current and projected financial requirements, market returns, and risks and any special requirements of the AMITY REGIONAL SCHOOL DISTRICT NO. 5 OPEB Plan. The Amity Board of Education will address these objectives in periodic reviews of the Plan's performance.

The Plans have both absolute and relative investment objectives.

#### Absolute objectives:

- A long-term objective is to achieve growth in the principal value of assets while maintaining a level of stability and liquidity sufficient to ensure the timely payment of the plans' obligations.
- Achieve the target rate of return as defined by the actuarial rate of return, over a full market cycle, defined as approximately 5 to 7 years.

#### Relative Objectives

- Perform in line with the target asset mix.
- Exceed the 50<sup>th</sup> percentile return of a universe comprised of funds or managers with similar objectives and/or styles over time.

Consistent with the diversification objectives of the portfolio, the Investment Policy is based on the assumption that the volatility of the portfolios will be similar to that of the target policy.

The investment goals above are the objectives of the aggregate Plan, and are not meant to be imposed on each investment manager. Each individual investment manager shall be subject to either a specific investment policy statement for separate account mandates, or the prospectus for mutual funds. These individual investment policy statements and/or prospectus are attached in the Appendix.

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#### ASSET ALLOCATION

The asset allocation target ranges set forth below represent a long-term view. Short-term market volatility may cause the asset mix to fall outside the targeted range. The target allocation may change should the Amity Board of Education, at its discretion, decide to change the mix of invested assets.

Target Asset Allocation Table											
Asset Class	Min. Weight	Target Weight	Max. Weight	Benchmark							
Fixed Income	10%	20%	30%	Barclays Aggregate Index							
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Fixed Income				TIPS Index							
Domestic Equity Large	30%	30%	60%	S&P 500							
Domestic Equity Small	0%	10%	20%	CRSP US Small Cap TR							
				Index							
International Equity	5%	20%	40%	FTSE Developed ex NA							
				Spliced Index							

The Plan's target policy benchmark shall be a weighted composite of market indices of the target allocation stated above.

Given the volatility of the capital markets, strategic adjustments in various asset classes may be required to rebalance asset allocation back to its target policy. Such adjustments should be executed so as to minimize excessive turnover and transaction costs. The Amity Board of Education will review actual asset allocation versus target asset allocation periodically to assess the need for portfolio rebalancing.

#### **EVALUATION & REVIEW**

The Amity Board of Education will review performance on a periodic basis. The goal is for each individual investment manager to outperform an appropriate benchmark index and be in the top 50% of their style specific peer group over a full market cycle. Performance review will not only include the examination of investment returns, but the risk assumed to achieve those returns. At its discretion, the Amity Board of Education may replace managers for performance or other reasons other than performance (e.g. change in management or philosophy) that, in its estimation, hinders the firms ability to meet its investment objectives.

#### **ADOPTION**

This Investment Policy Statement is made effective by the Amity Board of Education on November 10, 2015.

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### AMITY REGIONAL SCHOOL DISTRICT NO. 5

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



phone: (203) 397-4811

fax: (203) 397-4864

Dr. Jennifer P. Byars Superintendent of Schools

#### 2022 BOARD OF EDUCATION REGULAR MEETING SCHEDULE

Regular meetings of the Amity Regional School District No. 5 Board of Education will be held on the second Monday of every month, unless otherwise noted. All meetings, with the exceptions of February and October, will be held in the designated room at Amity Regional High School, 25 Newton Road, Woodbridge, CT 06525. Any meeting location changes will be listed on the meeting notices. Meetings will begin at 6:30 p.m.

Monday January 10, 2022

Monday February 14, 2022

Monday March 14, 2022

Monday April 4, 2022 Exception

First Monday of the month

Monday May 9, 2022

Monday June 13, 2022

Monday August 15, 2022 Exception

Third Monday of the month

Monday September 12, 2022

Monday October 17, 2022 Exception

Third Monday of the month Amity Middle School 190 Luke Hill Road Bethany, CT 06524

Monday November 14, 2022

Monday December 12, 2022 Exception

Amity Middle School 100 Ohman Avenue Orange, CT 06477

Monday January 9, 2023

Respectfully submitted,

Jennifer P. Byars

Superintendent of Schools

SUBMITTED TO BOARD OF EDUCATION FOR APPROVAL OCTOBER 18, 2021



June 7

Last Day of School - Students

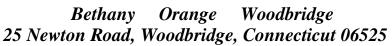
### **Amity Regional School District No. 5** 2022-2023 District Calendar



Date	Event or Holiday	August 2022 (3/3)					September 2022 (20/23)							October 2022 (19/42)									
August 23	Prof. Dev Teachers Only	S	М	Т	W	R	F	S	S	М	Т	W	R	F	S	S	М	Т	W	R	F	S	
August 24	Prof. Dev Teachers Only												1	2	3							1	
August 25	Prof. Dev Teachers Only		1	2	3	4	5	6	4	5	6	7	8	9	10	2	3	4	5	6	7	8	
August 29	First Day of School - Students Early Dismissal	7	8	9	10	11	12	13	11	12	13	14	15	16	17	9	10	11	12	13	14	15	
August 30	Students Early Dismissal	14	15	16	17	18	19	20	18	19	20	21	22	23	24	16	17	18	19	20	21	22	
September 5	Labor Day - No School	21	22	23	24	25	26	27	25	26	27	28	29	30		23	24	25	26	27	28	29	
September 8	Back to School Night - ARHS - Grades 9&12	28	29	30	31											30	31						
September 13	Back to School Night - Middle Schools																						
September 15	Back to School Night - ARHS - Grades 10&11	November 2022 (19/61)				31)	December 2022 (17/78)						January 2023 (21/99)										
September 22	Early Dismissal - Professional Development	S	М	Т	W	R	F	S	S	М	Т	W	R	F	S	S	М	Т	W	R	F	S	
September 26	Rosh Hashana - No School			1	2	3	4	5					1	2	3								
October 5	Yom Kippur - No School	6	7	8	9	10	11	12	4	5	6	7	8	9	10	1	2	3	4	5	6	7	
October 10	Columbus/Indigenous Peoples Day - No School	13	14	15	16	17	18	19	11	12	13	14	15	16	17	8	9	10	11	12	13	14	
October 13	Early Dismissal - Professional Development	20	21	22	23	24	25	26	18	19	20	21	22	23	24	15	16	17	18	19	20	21	
November 8	Prof. Dev Teachers Only	27	28	29	30				25	26	27	28	29	30	31	22	23	24	25	26	27	28	
November 9	Parent Conferences - Middle Schools															29	30	31					
November 10	Parent Conferences - High School																						
November 16	Parent Conferences - High School	Fe	bru	ary	202	3 (1	8/11	<b> 7)</b>	March 2023 (23/140)					))	April 2023 (14/154)								
November 17	Parent Conferences - Middle Schools	S	М	Т	W	R	F	S	S	М	Т	W	R	F	S	S	М	Т	W	R	F	S	
November 23	Early Dismissal				1	2	3	4				1	2	3	4							1	
November 24, 25	Thanksgiving - No School	5	6	7	8	9	10	11	5	6	7	8	9	10	11	2	3	4	5	6	7	8	
December 7	Parent Conferences - MS/HS - Early Dismissal	12	13	14	15	16	17	18	12	13	14	15	16	17	18	9	10	11	12	13	14	15	
December 8	Early Dismissal - Professional Development	19	20	21	22	23	24	25	19	20	21	22	23	24	25	16	17	18	19	20	21	22	
December 23	Early Dismissal	26	27	28					26	27	28	29	30	31		23	24	25	26	27	28	29	
December 26 - 30	Holiday Recess															30							
January 5	Early Dismissal - Professional Development																						
January 16	Martin Luther King, Jr. Day - No School	May 2023 (22/176)					June 2023 (5/181)							July 2023 (0)									
February 8	Parent Conferences - Middle Schools	S	М	Т	W	R	F	S	S	М	Т	W	R	F	S	S	М	Т	W	R	F	S	
February 9	Early Dismissal - Professional Development												1	2	3							1	
February 15	Parent Conferences - High School		1	2	3	4	5	6	4	5	6	7	8	9	10	2	3	4	5	6	7	8	
February 16	Parent Conferences - Middle Schools	7	8	9	10	11	12	13	11	12	13	14	15	16	17	9	10	11	12	13	14	15	
February 20, 21	Winter Recess	14	15	16	17	18	19	20	18	19	20	21	22	23	24	16	17	18	19	20	21	22	
March 16	Early Dismissal - Professional Development	21	22	23	24	25	26	27	25	26	27	28	29	30		23	24	25	26	27	28	29	
April 7 - April 14	Spring Recess	28	29	30	31											30	31						
April 27	Early Dismissal - Professional Development	If emergency closings extend beyond June 30, 2023, any additional days will be taken from Spring Research beginning												nina									
May 29	Memorial Day - No School	If emergency closings extend beyond June 30, 2023, any additional days will be taken from Spring Recess, beginnin with April 10, 2023. Amity Regional High School Graduation is traditionally held on the actual last day of school for																					

oring Recess, beginning with April 10, 2023. Amity Regional High School Graduation is traditionally held on the actual last day of school for students. Total Days For Students = 181; Total Days For Teachers = 185

### AMITY REGIONAL SCHOOL DISTRICT NO. 5





Dr. Jennifer P. Byars Superintendent of Schools jennifer.byars@amityregion5.org 203.392.2106

#### October 18, 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:

*Erin Angelucci* – F/T Biology Teacher - Erin brings to Amity a wealth of experience as a Biology Teacher. She served in that capacity for 17 years in the Norwalk Public School District before joining the Amity team. Erin earned her Bachelor's Degree in Animal Science from the University of Connecticut and her Master's Degree in Science Education from Southern Connecticut State University.

- Amity Regional Middle School Bethany: NONE
- <u>Amity Regional Middle School Orange:</u> **NONE**

### NEW HIRES-BENCH/LONG TERM SUBSTITUTES:

William Bronson – Bench Substitute Teacher – Amity Regional High School

#### **♣** New Hires-Non-Certified:

*John Crandall* – Math Interventionist – Amity Middle School – Bethany *Benjamin Wisnewski* – Part Time Paraprofessional – Amity Transition Academy

#### NEW HIRES-COACHES:

Kassie Ryan – Co-Ed Cross Country Co-Coach - 2021 Fall Season – Amity Middle School - Bethany Marissa Nall – Co-Ed Cross Country Co-Coach - 2021 Fall Season – Amity Middle School - Bethany Jennifer Ford – Co-Ed Cross Country Coach - 2021 Fall Season – Amity Middle School - Orange Sarah Rainey – Girls Volleyball Coach – 2021 Fall Season – Amity Middle School - Orange Thomas Norton – Girls Soccer Coach – 2021 Fall Season – Amity Middle School – Bethany Amanda Acampora – Head Softball Coach – 2022 Spring Season – Amity Regional High School

### **TRANSFERS:**

*David Maus* – Full Time Security Guard at Amity Regional High School to the position of .8 Evening Security Guard at Amity Regional High School, effective October 25, 2021.

*Anthony Kacprzyski* – .8 Evening Security Guard at Amity Regional High School to the position of Full Time Security Guard at Amity Regional High School, effective October 25, 2021.

#### **RESIGNATIONS:**

Alexander DeBrizzi – Long Term Science Substitute Teacher ~ Amity Regional High School, eff. 10/01/2021

Lorraine Milano – FT Security Guard ~ Amity Middle School - Orange, eff. 10/06/2021

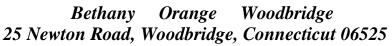
Maura Regan – Girls Ski Racing Coach ~ Amity Regional High School, eff. 10/07/2021

Jade Blair – Asst. Softball Coach ~ Amity Regional High School, eff. 10/07/2021

Cassidy Kirby – Asst. Boys Volleyball Coach ~ Amity Regional High School, eff. 10/08/2021

Joy Shane – Health Teacher ~ Amity Regional High School, eff. 10/15/2021

## AMITY REGIONAL SCHOOL DISTRICT NO. 5





Dr. Jennifer P. Byars Superintendent of Schools jennifer.byars@amityregion5.org 203.392.2106

#### **November 8, 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:

Taylor Garry – F/T Health Teacher - Taylor completed her student teaching at Bridgeport Fairchild Wheeler Magnet High School, then continuing on as a long term substitute teacher the following fall. She also served as a long term substitute teacher at Achievement First Bridgeport Middle School. Taylor earned her Bachelor's Degree in Health Education from Western Connecticut State University and is pursuing her Master's Degree from Emporia State University through which she will earn her dual Physical Education Certification.

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

#### New Hires-Bench/Long Term Substitutes:

Sharon Hale – Bench Substitute Teacher – Amity Regional High School

Adrie Kornasiewicz – Long Term Substitute Chemistry Teacher – Amity Regional High School

#### New Hires-Non-Certified:

Victor Fuentes - School Security Officer (SSO) - Amity Middle School-Orange

#### **♣** NEW HIRES-COACHES:

Shelby Mendillo – Interim Girls Ski Racing Coach - 2021 Winter Season – Amity Regional High School Tyshawn Cannon – Girls Basketball Coach - 2021 Winter Season – Amity Middle School – Bethany Amanda Acampora – Head Softball Coach - 2022 Spring Season – Amity Regional High School Kate Hoffman – Asst. Softball Coach - 2022 Spring Season – Amity Regional High School

- **TRANSFERS:** NONE
- **RESIGNATIONS: NONE**

#### RETIREMENTS:

Beth Moffat – Administrative Assistant-Cat. IV, Amity District Offices, eff. 02/05/2022

#### 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 – October 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

**OBOA Day of Dialogue:** On Thursday, October 14, 2021, students attended various workshops during the second half of the academic day focused around various themes of activism and social justice. Over 30 workshops were presented by student groups, faculty, staff, and outside presenters. This is the 5<sup>th</sup> year ARHS has held a workshop program.

**U.S. News and World Report Rankings:** Congratulations to AMSB for being recognized as the 7<sup>th</sup> Best Middle School in Connecticut and to AMSO for being ranked 10<sup>th</sup> Best in the state. Amity Region 5 is the only district with 2 middle schools in the top 10.

**Portrait of the Graduate Pilot:** ARHS Teachers will unpack and reflect on the recently-released BOWA Portrait of the Graduate through ongoing discussions in Interdisciplinary PLC. The second semester will be focused on a small group project, conceived by each individual PLC group that focuses around the Portrait of the Graduate.

Readers Workshop Launch: The Readers Workshop (RW) launch in both middle schools continues to be very successful. Students have a broad array of titles to choose from in their first unit of study. The launch unit oriented students to the RW model. In this program, our students will be reading many more books per year, as they read texts that are connected to a mentor text and explore authors from different cultures, genders, and backgrounds. Teachers continue to work on curriculum planning with Andrea Drewry, MS Literacy Coach. Plans are being made for teachers to attend a four-day Teachers College Summer Institute for Readers Workshop. It has not yet been decided as to whether the summer institutes will be in-person or virtual.

**PSAT Administration:** On Wednesday, October 13, 2021, all 11<sup>th</sup> grade students sat for the annual administration of the PSAT, the qualifying exam for the National Merit Scholar Competition. In a shift from previous years, 10<sup>th</sup> grade students did not take Pre-ACTs on the same day. Rather, they will sit for that exam on the same day that the annual SAT is given to juniors in March, which will allow for 10<sup>th</sup> grade students to cover more material throughout their sophomore year prior to taking the practice exam.

Work on the AMSO Mural Continues: Art students resumed work on the Blue Green Story mural that was started two years ago. The mural showcases the Long Island Sound, its commerce, wildlife, and key landmarks of our New Haven Harbor. This year students are continuing to research and explore this complex eco system and add another dimension to the mural. This mural represents a wonderful blending of art, science, and local community resources to express student learning in a meaningful way.

**Hispanic Heritage Month at AMSO:** In recognition of Hispanic Heritage month, the AMSO news recognized a Hispanic artist throughout the month. Culturally relevant songs were also added to the broadcast throughout the month.

**High School Options for 8**<sup>th</sup> **Grade Students:** School choice presentations were provided to students in both AMSO and AMSB last month. These presentations included visits from Trumbull Vocational/Agricultural High School, Nonnewaug High School, and Platt Technical High School. The presentations were well attended.

Curriculum Committees and District Meetings: Curriculum articulation meetings held included High School Reading, Social Studies/History, and World Language. District meetings held included Professional Development and Evaluation Committee, Wellness Committee, and District Steering. The BOWA STEAM Committee met and would like to plan for STEAM Day during the 2022-2023 academic year.

**ATA Expansion to UNH-Orange:** On September 20, 2021 Amity Transition Academy expanded to a second classroom at the University of New Haven-Orange Campus. We are grateful to our partners at the University of New Haven and look forward to our on-going collaboration and partnership with the University in the coming years.

**Pupil Services Professional Learning:** The State of Connecticut has started the process of training school districts in writing high quality IEPs related to the new IEP being introduced July 1, 2022. Amity has registered a team of teachers, related service providers, and administrators to attend the training starting in January. Dr. Michael Regan from Fairfield University provided two days of training to our new special education teachers on test administration, interpretation, and report writing. We were able to offer this training to our teachers through the CSDE Special Education Stipend that was awarded to the district.

#### Resources

**Professional Learning 2021-2022:** Both the full-day sessions and the minimum day afternoon sessions will focus on the theme *Inclusive and Supportive Environment*: Trauma-Informed Classrooms, Diversity, Inclusion and Equity, Anti-Bias Education, and Transgender and other Diverse Groups Education. Elena Serapiglia, ARHS Dept. Chair for World Language, created an Infographic of the 2021-22 Professional Learning that was shared with all teachers and administrators.

CES Partners for Curriculum Audit: Dr. Lori Elliott, CES Consultant for Diversity, Equity, and Inclusion, will provide training in conducting a Curriculum Equity Audit. Identified departments will work with Dr. Elliott to examine curriculum through the lens of Diversity, Equity, and Inclusion. Additionally, participating teachers will examine books and supplemental materials for curriculum with focus on diversity, inclusion, and equity. English 9-12 and Social Studies/History 7-12 will begin the process in November and continue through this year. A Library Media Specialist will work with each grade along with the MS Literacy Coach. Other content areas will be reviewed in subsequent school years. Dr. Elliott will provide the Board of Education and the District Steering Committee a presentation describing the process and rationale for using the Curriculum Equity Audit.

**Donations from Smoothie King:** One Thursday afternoon, October 14, 2021, a local business donated smoothies to the faculty and staff of ARHS as a thank you for their hard work displayed every day.

**TEAM Mentor Program:** The Teacher Education and Mentoring (TEAM) Program held a 2021-2022 kickoff meeting for all new teachers. New teachers were introduced to the TEAM Dashboard login and expectations for the 2021-2022.

**Amity Represented on ConnCase:** Mr. Thomas Brant, Director of Pupil Personnel Services, was recently appointed the Related Services Representative to the Connecticut Council of Special Education Administrators (ConnCase) Executive Board.

#### Climate

**No Place for Hate:** Nineteen AMSO and AMSB students participated in leadership training from the ADL. The training focused on preparing students to lead the school wide initiative to achieve a No Place for Hate designation. Students learned more about their commitment, shared ideas, and aligned programing for this school year. AMSB held their first No Place for Hate Committee meeting last week, and it was the most well attended meeting in years. A large number of students, staff, and parents participated, speaking to the commitment of our staff, students, and community to examine and strengthen our school climate, and continue to make AMSB a safe place for all students. An introduction to No Place for Hate was one of the workshops students could choose to attend during the Day of Dialogue at ARHS.

ARHS Club Day, 2021: For the first time in 2 years the ARHS Club Day event was held in-person, on campus on September 30<sup>th</sup>, where over 60 student-run clubs set up tables for all students of ARHS to peruse. Club meetings began the following week after school and activities, such as trips and fundraisers, have already begun to be planned.

**2021 AMSB Color Run**: The AMSB Annual Color Run is scheduled for October 23, 2021, starting at 9:00 am. This event is one of the main fund-raising activities for our PTSO and is a wonderful way to come together as an AMSB family. The event takes place on the AMSB campus and is always well attended. Family teams are encouraged to join and come have a fun day of music, exercise, and community.

**Unified Programs:** Unified Sports has resumed at ARHS. Students are preparing for their interscholastic event at the end of the month. Practices are held every Tuesday during the month of October for our student athletes. Unified Theater will be resuming on October 21, 2021. Students will meet every other Thursday in preparation for their production in early March. Unified Sports on the Collegiate level at Albertus Magnus College and the University of New Haven has resumed. The athletes will be participating in an interscholastic event on Friday, October 22, 2021 at Albertus Magnus College.

**District Crisis Team:** The District Crisis Team chaired by Mr. Brant and Mrs. LaPlante had their first meeting of the year on September 30, 2021. This committee will support building level crisis teams through the creation of procedures and protocols to support best practices in Crisis Management. Members of the district crisis team will receive training in the NASP School Safety and Crisis Preparedness Training (PREPaRE) to further support their work.



Infographic of the 2021-2022 Professional Learning, Created by Elena Serapiglia

### 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 – November 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

November Professional Learning: A full-day Professional Learning Day was successfully held on November 2, 2021. The morning session included a panel discussion led by ARHS English Teacher, Tasia Kimball, and AMSB Principal, Jason Tracy. Our staff welcomed a panel of 5 current and former ARHS students to discuss inclusion and support of non-binary students within the school setting. The presentation and panel discussion was similar to a professional development workshop presented over 10 years ago called "Safe Spaces Training." The panel discussion was followed by an hour of Wellness offerings and included sessions focused on, but not limited to, Guided Meditation, Pet Portraits, Cricut, Crafts, Book Talks and Restorative Yoga. Todd Savage, PhD. from the University of Wisconsin-River Falls and past NASP President, presented to School Psychologists, School Social Workers, and School Counselors from Amity and School Psychologists from New Fairfield Public Schools. Dr. Savage presented on Advanced Counseling Techniques with Gender Diverse Students. The entire district was provided lunch prepared by Chartwells. Afternoon sessions included a variety of facilitated EdCamps. Teachers selected two sessions of choice and everyone participated in a third session for Restorative Practice.

**Spartan Seminar Emergency Vocabulary Review:** On Wednesday, November 3<sup>rd</sup>, the entire ARHS community reviewed vocabulary for emergency situations and had a chance to debrief and discuss recent emergency situations at ARHS. This discussion was aimed at helping to restore a sense of security at the high school and to begin to get all members of our immediate school community to share a common vocabulary and set of behavioral expectations for when the unforeseen occurs.

**Parent/Teacher Conferences:** The first round of parent/teacher conferences are scheduled for next week. To accommodate different parent/guardian schedules and preferences, parent/teacher conferences will be offered both virtually and in-person during this school year. Registration information was sent via email.

**Visit from Dr. Henry Lee:** On Friday, October 29<sup>th</sup>, renowned forensic scientist (and former ARHS parent) Dr. Henry Lee visited the high school to share his advice, wisdom, and experience with many of our students. Students enrolled in the elective science forensic class were invited to attend, along with students from Science Research Program, the It's the Law CTE elective, and those enrolled in the True Crime English elective. Dr. Lee's witty and humorous approach to presenting held students' attention while they learned about real-world crime scene and forensic investigation. A HUGE thank you to Nick Shamp, from the ARHS Science Department, for arranging the presentation/visit.

**Peer Tutoring Program at AMSO:** The AMSO Peer Tutoring program started on November 1, 2021. Fifteen 8<sup>th</sup> grade students were trained to be tutors and mentors to 7<sup>th</sup> grade students. In addition to supporting academic achievement, the program seeks to promote collaboration and strengthen the school community across the grade levels.

**AMSO Explores Spanish Culture:** AMSO students celebrate the Day of the Dead. Eighth grade students explored Spanish culture and history as they participated in a variety of activities throughout the day.

**District Committee and Curriculum Meetings:** Curriculum Articulation meetings held included World Language and Math. District meetings scheduled during November included District Technology, District Steering, and SRBI/RTI (Scientifically Research-Based Instruction/Response to Intervention). Dr. Elliott provided the District Steering Committee a presentation describing the process and rationale for using the Curriculum Equity Audit during the last week of October.

#### Resources

**English and Social Studies Begin DEI Curriculum Audit:** Dr. Lori Elliott, CES Consultant for Diversity, Equity, and Inclusion, will provide training in conducting a Curriculum Equity Audit the first week of November. Identified departments will work with Dr. Elliott to examine curriculum through the lens of Diversity, Equity, and Inclusion. Additionally, participating teachers will examine books and supplemental materials for curriculum with a focus on Diversity, Inclusion, and Equity. English 9-12 and Social Studies/History 7-12 will begin the process in November and continue through this year. A Library Media Specialist will work with each grade, along with the MS Literacy Coach.

**Free Dr. Lee Presentation:** Even though Dr. Henry Lee is a world-renowned presenter, the presentation he gave for ARHS students was pro-bono...all he asked for were a few pumpkins, which Mr. Shamp stenciled for him to acknowledge his connection to Amity.

Amity Supports BOWA Reading PL: On November 2nd, Identified Special Education and Reading Teachers from Amity along with more than 30 colleagues from Bethany, Woodbridge, and Orange Public Schools attended professional development focused on consistent approaches to structured literacy across the BOWA. The presentation was facilitated by Jule McCombes-Tolis, Ph.D., Director of Reading and Language Development at Fairfield University.

#### Climate

**High School & Collegiate Unified Sports:** Amity Transition Academy hosted a successful Collegiate Unified Sports Event at Albertus Magnus College. Schools from Hamden Transition Academy, Milford, Southington, and North Branford were invited to participate. On Thursday, October 28<sup>th</sup>, ARHS Unified Sports hosted the annual soccer tournament on the all-weather field. With support from the ARHS Football Team, the tournament was the first opportunity for in-person competition in 2 years. Multiple area schools participated and the event was a huge success!

**AMSO Spirit Week:** AMSO students and staff enjoyed Spirit Week October 25-29, 2021. Students participated in daily raffles to encourage participation and school spirit. As a culminating activity students and staff were thrilled to wear their Halloween costumes to school.

**No Place for Hate:** AMSO students were introduced to the No Place for Hate pledge during advisory. Students were invited to sign the pledge as a symbol of unity and support to strive to promote a kinder, more inclusive school community. AMSB students will introduce the pledge through Advisory in the coming weeks.

<u>AMSB Student Activities</u>: The students and staff all participated in a pep rally and Halloween celebration on October 29, 2021. It was great to get classes together in the gym to celebrate hard work,

play some games, and have fun. Students had a costume contest by team and staff enjoyed their time with the students. The PTSO and WYS provided support and treats! It was fun to see our kids being kids!

**AMSB Kindness Garden:** Work has begun on the AMSB Kindness Garden this week. Students began painting rocks and creating unique pieces of art, with messages of kindness and hope. The rocks will be placed in our courtyard garden and the work will be viewable from the main hall throughout the year.

**Winter Sports Registration:** Winter sports registration has begun. Please check out the Amity Athletics webpage for information on how to register and also how to attend the Winter Sports Night.

**National School Psychology Week:** During the week of November 8-12, 2021 Amity will celebrate National School Psychology Week (NSPW) to highlight the important work school psychologists and other educators do to help all students thrive. This year's theme is "Let's Get in Gear." The theme's acronym provides a challenge to grow both personally and professionally. It encourages us to engage in best practices and advocate for children's access to mental health and learning supports. To rise implies resilience and renewal despite the challenges of the past.



*ARHS Staff Welcomes Dr. Henry Lee – all for the price of a pumpkin* 

October, 2021

# Sep. Ticket Summary

Tickets addressed and closed: NA

Tickets open: 0

# HS Student Help Desk

Students helped: NA

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:**

- Preparing for replacement of Photography lab computers
  - New lab computers were ordered, delivered, and are currently being imaged.
  - Installation of the new computers is expected before the new calendar year. We are allowing the staff to get comfortable with them before full replacement.
- Security camera upgrades completed so far:
  - Cameras capable of reading and recording license plates on school property
  - Cameras for coverage of the new stadium
- Posted for student help desk workers
  - Interviewed students for Student-led help desk position
  - Offered 8 initial open slots to student candidates; additional openings may become available as we develop the work flow or when schedules change for second semester
- New phone system is installed and operational.

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

- Pulling wires and installing infrastructure for additional security cameras inside and outside of all three buildings; ongoing
- Supporting the exchange of Xerox machines around the District as they come in
- Supporting the Technology Committee as they explore possible Learning Management System (LMS) solutions
- Preparing technology budget requests and updating the technology budget to reflect the full 1:1 environment post-Covid



November, 2021

# Oct. Ticket Summary

Tickets addressed and closed: 135

Tickets open: 8

# HS Student Help Desk

Students helped: 334

Amity Regional School District No. 5

25 Newton Road

Woodbridge, CT 06525 Phone: 203-397-4817

Fax: 203-397-4864

# AMITY

# Amity Regional School District No. 5

# **Technology Department Monthly Report**

### **Completed Projects:**

- Preparing for replacement of Photography lab computers
  - New lab computers were ordered, delivered, and are imaged.
  - Installation of the new computers is expected before the new calendar year;
     we are allowing the staff to get comfortable with them before full replacement
- Security camera upgrades completed so far
  - Replaced two failed outdoor cameras: one at the stadium and one on the HS.
- Posted for student help desk workers
  - Hired 7 students who are actively working the student help desk on a daily basis.

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

- Pulling wires and installing infrastructure for additional security cameras inside and outside of all three buildings; ongoing.
- Supporting the exchange of Xerox machines around the District as they come in.
- Supporting the Technology Committee as they explore possible Learning Management System (LMS) solutions.
- Preparing technology budget requests and updating the technology budget to reflect the full 1:1 environment post-Covid.
- Computers in digital media lab 164 at the HS are going to be re-imaged next week in an effort to refresh and clean up the lab.
- A classroom audio system solution has been ordered and will be installed and tested upon arrival to determine if it will be a viable large scale solution to the lower sound level issues caused by moving classroom desktop computers to laptops.
- The SwipeK12 classroom attendance system continues to receive major updates based on our requests as we continue to customize it to fit our specific needs. The latest update was rolled out over the weekend of Oct. 30-31.

October, 2021 Volume 12, Issue 1

### Amity Regional School District #5



# 2020/2021 FACILITIES REPORT

# Amity Regional High School (ARHS) Summer Project Wrap-up

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It was a busy year at ARHS with numerous projects underway. Listed below are some of the improvements that staff and students will realize for this school year:

- The completion of the long awaited stadium project at ARHS
- The final phase of paving the upper parking lot.
- The final phase of the air handler replacement project.
- The completion of the new student help desk entry doors.
- A New scoreboard, bleachers and ADA walkway on Athletic Field #3
- Roof Restoration

 Replacement of the underground heating return pipe





New track and field three bleachers



Relocated heating return piping



Ready for paving

# Other Improvements at ARHS

Our custodians repainted the offices in the guidance suite and other areas throughout the school. Our building maintainers added two ductless mini split units to the new data center closet, replaced many of the older cabinet unit heaters in the stairwells and vestibules,

and the parking lot lines were repainted in the district all in addition to their regular routine and preventative maintenance schedules throughout the summer. The custodial and maintenance staffed worked hard behind the scenes to make the first ever Amity outdoor musi-

cal and proms happen. The staff along with our grounds maintenance staff worked together to clean up the stadium grounds.





In December of 2020 an early morning fire started in one of the light fixtures in the gym forcing the students and staff out of the building. AMSB staff did a great job getting the students back onto the busses and keeping all staff and students safe. Semyon our head custodian did a tremendous job on handling the situation and working with staff and fire officials on securing the area and helping with smoke removal. In the end AMSB gym received a completely refinished floor, new stage curtains, and cleaned ductwork. After the investigation was done, a decision was made to replace the light fixtures as a precaution with new LED high bay fixtures. Our in house building electrician and building maintainer shifted their schedule to meet the needs of the school and replaced all fixtures.

Throughout the school year the staff did a great job in being flexible with the ever changing COVID rules, keeping the building clean and safe even with the return to lunches inside. Over the summer the Bethany staff did a tremendous job of cleaning and readying the building for the new school year.



# Orange Recap

In April of 2021 AMSO saw the demolition of the old long standing modular building. It was being used for storage but was rapidly deteriorating and becoming unsafe. The custodial and maintenance staff worked to clean it out and prep for demolition and a contractor was hired for the removal. Late summer also saw the athletic field at AMSO get a much needed overhaul to improve the drainage.

Throughout the school year the custodial staff did an amazing job keeping up with the cleaning and sanitizing as well as handling the return to lunches. Like Bethany, since the same fixtures were used in the Orange gym, the decision was made to replace those as well. Behind the scenes our in house HVAC tech worked on replacing actuator valves on the air handler units, controller upgrades, and other pm work on the HVAC systems. Over the summer the crew did an outstanding job cleaning and prepping the building for return and all classrooms were repainted.









Before and after AMSO modular demolition





Concrete track surface and new artificial turf

"The entire Amity Custodial staff went above and beyond this school year working with ever changing cleaning guidelines to follow, schedule changes, classroom layouts, picnic table assembly, whatever came their way they handled with pride and professionalism. The Amity maintenance staff too worked tirelessly on dividers, curtains, barricades, HVAC requirements, whatever it took to not only get these buildings open, but to be flexible and creative in working to keep up the changes and demands that the COVID era brought us. They were able to keep up with all of this and still find time for normal preventative maintenance schedules, routine scheduled cleaning, a rough winter and the day to day emergencies that pop up.

"I cannot say enough about how proud I am to work with such an amazing group of people.."

Steve Martoni

Director of Facilities



# Amity Regional School District #5

Facilities Department

25 Newton Road Woodbridge, CT. 06525 Phone: 203 397-4818

email: steve.martoni@amityregion5.org





# Safety and Security Highlights

Throughout the year, enhancements were made to the safety and security of the Amity schools. These include additional card readers, camera improvements and additional safety film installed on windows.



New door access readers

Window film upgrades



October 2021

# CLEAN

### **SAFE**

#### **HEALTHY**

#### **SCHOOLS**

# Amity Regional School District No. 5

# **Facilities Department Monthly Report**

### **Completed Projects:**

- The air handler/guidance office fit-out project was completed.
- The cooling tower piping at ARHS was completed.

#### Projects in process:

- The ARHS Track and Field project is close to completion; there are a few punch list items to be addressed.
- Reviewing the District's storage needs and options for the modular building at AMSB.
- Roof restoration and repair at ARHS is wrapping up. There was a delay in materials for the capstones; but all roof work was completed.
- The acoustic panel project bid was awarded and is in the scheduling process.
- Security fencing is being installed along the road at AMSB.
- PM maintenance on the boiler plant is scheduled for all three schools.
- Snow removal equipment is being serviced for the upcoming season.

### Outstanding issues to be addressed:

Amity Regional School District No. 5

25 Newton Road

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		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2020-2021	2021-2022	SEPT 21	CHANGE	OCT 21	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
1	MEMBER TOWN ALLOCATIONS	49,760,789	50,495,237	50,495,237	0	50,495,237	0	FAV
2	OTHER REVENUE	155,137	136,871	127,076	(2,000)	125,076	(11,795)	UNF
3	OTHER STATE GRANTS	1,081,353	1,025,301	774,404	279	774,683	(250,618)	UNF
4	MISCELLANEOUS INCOME	23,374	40,798	40,798	0	40,798	0	FAV
5	BUILDING RENOVATION GRANTS	0	0	0	0	0	0	FAV
6	TOTAL REVENUES	51,020,653	51,698,207	51,437,515	(1,721)	51,435,794	(262,413)	UNF
7	SALARIES	26,973,879	28,036,821	27,765,716	14,351	27,780,067	(256,754)	FAV
8	BENEFITS	4,801,671	5,597,784	5,538,501	(323)	5,538,178	(59,606)	FAV
9	PURCHASED SERVICES	8,483,699	9,758,800	9,493,559	(54,990)	9,438,569	(320,231)	FAV
10	DEBT SERVICE	4,453,835	4,453,835	4,453,835	0	4,453,835	0	FAV
11	SUPPLIES (INCLUDING UTILITIES)	2,583,319	3,218,072	3,244,072	0	3,244,072	26,000	UNF
12	EQUIPMENT	320,427	54,348	54,348	0	54,348	0	FAV
13	IMPROVEMENTS / CONTINGENCY	331,379	404,500	378,500	0	378,500	(26,000)	FAV
14	DUES AND FEES	80,852	174,047	174,047	0	174,047	0	FAV
15	TRANSFER ACCOUNT	507,844	0	0	0	0	0	FAV
16	TOTAL EXPENDITURES	48,536,905	51,698,207	51,102,578	(40,962)	51,061,616	(636,591)	FAV
17	SUBTOTAL	2,483,748	0	334,937	39,241	374,178	374,178	FAV
18	PLUS: CANCELLATION OF PRIOR YEAR'S ENCUMBRANCES	352,364	0	0	0	0	0	FAV
19	DESIGNATED FOR SUBSEQUENT YEAR'S BUDGET:	0	0	0	0	0	0	FAV
20	NET BALANCE / (DEFICIT)	2,836,112	0	334,937	39,241	374,178	374,178	FAV

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2020-2021	2021-2022	SEPT 21	CHANGE	OCT 21	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
1	BETHANY ALLOCATION	9,000,731	8,983,608	8,983,608	0	8,983,608	0	FAV
2	ORANGE ALLOCATION	25,003,802	25,236,005	25,236,005	0	25,236,005	0	FAV
3	WOODBRIDGE ALLOCATION	15,756,256	16,275,624	16,275,624	0	16,275,624	0	FAV
4	MEMBER TOWN ALLOCATIONS	49,760,789	50,495,237	50,495,237	0	50,495,237	0	FAV
5	ADULT EDUCATION	4,286	3,042	3,042	0	3,042	0	FAV
6	PARKING INCOME	25,045	32,000	32,000	(2,000)	30,000	(2,000)	UNF
7	INVESTMENT INCOME	3,338	7,500	3,500	0	3,500	(4,000)	UNF
8	ATHLETICS	0	25,000	25,000	0	25,000	0	FAV
9	TUITION REVENUE	102,968	43,329	44,034	0	44,034	705	FAV
10	TRANSPORTATION INCOME	19,500	26,000	19,500	0	19,500	(6,500)	UNF
11	TRANSPORTATION BOWA AGREEMENT	0	0	0	0	0	0	FAV
12	OTHER REVENUE	155,137	136,871	127,076	(2,000)	125,076	(11,795)	UNF
13	OTHER STATE GRANT	0	0	0	0	0	0	FAV
14	SPECIAL EDUCATION GRANTS	1,081,353	1,025,301	774,404	279	774,683	(250,618)	UNF
15	OTHER STATE GRANTS	1,081,353	1,025,301	774,404	279	774,683	(250,618)	UNF
16	RENTAL INCOME	25	18,000	18,000	0	18,000	0	FAV
17	INTERGOVERNMENTAL REVENUE	4,797	4,798	4,798	0	4,798	0	FAV
18	OTHER REVENUE	18,552	18,000	18,000	0	18,000	0	FAV
19	TRANSFER IN	0	0	0	0	0	0	FAV
20	MISCELLANEOUS INCOME	23,374	40,798	40,798	0	40,798	0	FAV
21	BUILDING RENOVATION GRANTS	0	0	0	0	0	0	FAV
22	TOTAL REVENUES	51,020,653	51,698,207	51,437,515	(1,721)	51,435,794	(262,413)	UNF

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2020-2021	2021-2022	SEPT 21	CHANGE	OCT 21	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
1	5111-CERTIFIED SALARIES	22,041,070	22,915,344	22,670,573	11,712	22,682,285	(233,059)	FAV
2	5112-CLASSIFIED SALARIES	4,932,809	5,121,477	5,095,143	2,639	5,097,782	(23,695)	FAV
3	SALARIES	26,973,879	28.036.821	27,765,716	14.351	27.780.067	(256,754)	FAV
			-,,-	, ,	,	, ,	, , ,	
4	5200-MEDICARE - ER	369,840	407,811	407,811	0	407,811	0	FAV
5	5210-FICA - ER	300,649	311,405	311,405	0	311,405	0	FAV
6	5220-WORKERS' COMPENSATION	205,308	214,297	152,164	0	152,164	(62,133)	FAV
7	5255-MEDICAL & DENTAL INSURANCE	2,913,911	3,675,704	3,675,704	0	3,675,704	0	FAV
8	5860-OPEB TRUST	31,678	0	0	0	0	0	FAV
9	5260-LIFE INSURANCE	44,550	49,918	52,200	0	52,200	2,282	UNF
10	5275-DISABILITY INSURANCE	10,765	11,136	11,704	(323)	11,381	245	UNF
11	5280-PENSION PLAN - CLASSIFIED	790,234	764,395	764,395	0	764,395	0	FAV
12	5281-DEFINED CONTRIBUTION RETIREMENT PLAN	121,217	148,418	148,418	0	148,418	0	FAV
12	5282-RETIREMENT SICK LEAVE - CERT	0	0	0	0	0	0	FAV
13	5283-RETIREMENT SICK LEAVE - CLASS	0	0	0	0	0	0	FAV
14	5284-SEVERANCE PAY - CERTIFIED	0	0	0	0	0	0	FAV
15	5290-UNEMPLOYMENT COMPENSATION	12,131	12,500	12,500	0	12,500	0	FAV
16	5291-CLOTHING ALLOWANCE	1,388	2,200	2,200	0	2.200	0	FAV
17	BENEFITS	4,801,671	5,597,784	5,538,501	(323)	5,538,178	(59,606)	FAV
18	5322-INSTRUCTIONAL PROG IMPROVEMENT	37.973	26.600	26.600	0	26.600	0	FAV
19	5327-DATA PROCESSING	99.936	114.785	114.785	0	114,785	0	FAV
20	5330-OTHER PROFESSIONAL & TECHNICAL SRVC	1,657,059	1,749,530	1,749,530	0	1,749,530	0	FAV
21	5440-RENTALS - LAND. BLDG. EQUIPMENT	99,809	122.685	122,685	0	122.685	0	FAV
22	5510-PUPIL TRANSPORTATION	2.874.413	3.655.436	3,706,788	(66,455)	3.640.333	(15,103)	FAV
23	5521-GENERAL LIABILITY INSURANCE	255,503	249.650	264,839	0	264,839	15,189	UNF
24	5550-COMMUNICATIONS: TEL. POST. ETC.	88.161	114.356	104,306	0	104,306	(10,050)	FAV
25	5560-TUITION EXPENSE	3,206,118	3,638,655	3,316,923	11,465	3,328,388	(310,267)	FAV
26	5590-OTHER PURCHASED SERVICES	164.727	87.103	87,103	0	87.103	0	FAV
27	PURCHASED SERVICES	8,483,699	9,758,800	9,493,559	(54,990)	9,438,569	(320,231)	FAV

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2020-2021	2021-2022	SEPT 21	CHANGE	OCT 21	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
28	5830-INTEREST	788,835	788,835	788,835	0	788,835	0	FAV
29	5910-REDEMPTION OF PRINCIPAL	3,665,000	3,665,000	3,665,000	0	3,665,000	0	FAV
30	DEBT SERVICE	4,453,835	4,453,835	4,453,835	0	4,453,835	0	FAV
31	5410-UTILITIES, EXCLUDING HEAT	616,751	725,065	725,065	0	725,065	0	FAV
32	5420-REPAIRS, MAINTENANCE & CLEANING	764,059	747,751	773,751	0	773,751	26,000	UNF
33	5611-INSTRUCTIONAL SUPPLIES	244,344	369,883	369,883	0	369,883	0	FAV
34	5613-MAINTENANCE/CUSTODIAL SUPPLIES	159,130	246,698	246,698	0	246,698	0	FAV
35	5620-OIL USED FOR HEATING	49,787	42,500	42,500	0	42,500	0	FAV
36	5621-NATURAL GAS	41,929	68,171	68,171	0	68,171	0	FAV
37	5627-TRANSPORTATION SUPPLIES	93,802	122,016	122,016	0	122,016	0	FAV
38	5641-TEXTS & DIGITAL RESOURCES	68,322	243,902	243,902	0	243,902	0	FAV
39	5642-LIBRARY BOOKS & PERIODICALS	19,390	20,215	20,215	0	20,215	0	FAV
40	5690-OTHER SUPPLIES	525,805	631,871	631,871	0	631,871	0	FAV
41	SUPPLIES (INCLUDING UTILITIES)	2,583,319	3,218,072	3,244,072	0	3,244,072	26,000	UNF
42	5730-EQUIPMENT - NEW	182,811	49,348	54,348	0	54,348	5,000	UNF
43	5731-EQUIPMENT - REPLACEMENT	137,616	5,000	0	0	0	(5,000)	FAV
44	EQUIPMENT	320,427	54,348	54,348	0	54,348	0	FAV
45	5715-IMPROVEMENTS TO BUILDING	326,379	65.000	53,000	0	53,000	(12,000)	FAV
	5715-FACILITIES CONTINGENCY	100,000	100,000	100.000	0	100,000	0	FAV
45b	TRSF. FROM FACILITIES CONTINGENCY	(100,000)	0	(26,000)	0	(26,000)	(26,000)	FAV
	5720-IMPROVEMENTS TO SITES	5,000	89,500	101,500	0	101,500	12,000	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	0	0	0	0	FAV
48	IMPROVEMENTS / CONTINGENCY	331,379	404,500	378,500	0	378,500	(26,000)	FAV
49	5580-STAFF TRAVEL	3,135	23,850	23,850	0	23,850	0	FAV
	5581-TRAVEL - CONFERENCES	14,472	44,800	44,800	0	44,800	0	FAV
	5810-DUES & FEES	63,245	105,397	105,397	0	105,397	0	FAV
52	DUES AND FEES	80,852	174,047	174,047	0	174,047	0	FAV
	5856-TRANSFER ACCOUNT	507,844	0	0	0	0	0	FAV
	ESTIMATED UNSPENT BUDGETS	·	0	0	0	0	0	FAV
		10 700 00-				-		
55	TOTAL EXPENDITURES	48,536,905	51,698,207	51,102,578	(40,962)	51,061,616	(636,591)	FAV

#### AMITY REGIONAL SCHOOL DISTRICT NO. 5 REVENUES & EXPENDITURES BY CATEGORY FINANCIAL ANALYSIS FOR THE FISCAL YEAR 2020-2021



#### OCTOBER 2021

#### **2021-2022 FORECAST**

#### **OVERVIEW**

The projected unspent fund balance for this fiscal year is \$374,178 FAV previously, \$334,937 FAV, which appears on page 1, column 6, and line 20.

#### **REVENUES BY CATEGORY**

The projected yearend balance of revenues is \$262,413 UNF, previously, \$260,692 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 is to be \$2,000 UNF compared to budget.

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

The budget is based on the expectation that interest rates will remain low and revenue will not meet budget, \$4,000 UNF, previously \$4,000 UNF.

State Treasurer's

		State Heasurer s
<b>Month</b>	<b>Peoples United</b>	<b>Investment Fund</b>
July 2021	.398%	.10%
August	.398%	.10%
September	.398%	.09%
October	.398%	.09%

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

The forecast is based on budget.

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

The budget is based on three tuition students, one at a reduced employee rate. The actual tuition charged is higher (\$574 per year) than budgeted since the rate is set after the budget referendum is past. One tuition student has enrolled in the District since last month. *The projected variance is \$705 FAV*, *previously \$705 FAV*.

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

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The forecast is based on projected State payments and enrollment for magnet school transportation budgeted. *The actual transportation cost is \$19,500 which is \$6,500 UNF*.

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

The current projection is based on budgeted costs for placements and transportation. The budget assumes a 73% reimbursement rate. The end of year report for fiscal year 2021 was filed on September 1, 2021. This data submitted reports the final cost for high cost students. The State made its final payment to the District in May based on the March data. The State will adjust the payment for the current fiscal year based on any variances between the March report and the end of year report. There were significant changes in student placements after March 1<sup>st</sup>. It was noted in the forecast for fiscal year 2021 that we would receive additional funds that would not be "returned" to the State until this year. The additional funds were part of the surplus in the fiscal year 2021 end of year report. The forecast reflects that \$102,419 UNF will be reduced from our current year grant to align with the end of year report. The current reimbursement for students is down \$148,478 UNF based on current student placements. The total for this line is \$250,618 UNF. The budget expenditures will need to be reduced to cover this shortfall.

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

The forecast is based on the budget.

#### **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.

#### **EXPENDITURES BY CATEGORY**

The projected yearend balance of expenditures is \$636,591 FAV, previously \$595,629 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. There were 5 retirements at the end of fiscal year 2020. Fewer retirements were known during the budget process and therefore expected in 2021. Two staff members were budgeted to retire. To date 7 have retired and 7 have resigned. There is a favorable turnover variance of \$216,805 FAV in the forecast. An estimated number of stipend positions for clubs and activities are vacant, \$16,254 FAV, total for the certified salary line is \$233,059 FAV, previously \$244,771 FAV.

#### 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. There are 7 retirements which is unusually high for classified staff. *The forecast is \$23,695 FAV, previously, \$26,334 favorable. Substitutes costs are higher than budgeted due to the higher turnover and vacant positions.* 

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

The forecast is based on the budget.

#### 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 \$23,129 FAV. The renewal policy is \$39,004 FAV less than budgeted. We are provided the maximum premium number during the fiscal year and at the time of renewal, July 1, the final premium is calculated. Total savings YTD \$62,133 FAV, previously \$62,133 FAV.

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

The following charts are included to track how the District actual claims are comparing against the expected claims. How claims are running for the year has always been a common question, so the charts for claims and fees are shown monthly. However, claims are one piece of the medical budget line shown in the Excel file. Fees, employee contributions, grant funding, employer contributions to employee HSA accounts and reserve funding are other factors built into the Medical and Dental Insurance Budget. The claim chart in the Word document will not equal the Excel line since it is only one factor of the data comprising the medical budget. Certainly a significant factor which is why it is given in detail below.

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

#### CLAIMS OF CURRENT EMPLOYEES AND RETIREES

	2	2021-2022		2021-2022			2	2020-2021	2	2019-2020
MONTH	A	ACTUAL	CTUAL BUDGET		VARIANCE		A	ACTUAL	ACTUAL	
JUL	<b>\$</b> \$	530,877	\$	369,954	\$	160,923	\$	256,509	\$	366,182
AUG	\$\$	405,635	\$	426,870	\$	(21,235)	\$	200,490	\$	383,765
SEP	\$	364,327	\$	363,929	\$	398	\$	292,575	\$	317,685
OCT	\$\$	341,109	\$	361,074	\$	(19,965)	\$	293,360	\$	383,369
NOV	\$	464,671	\$	464,671	\$	-	\$	409,279	\$	370,672
DEC	\$	507,134	\$	507,134	\$	-	\$	489,999	\$	403,126
JAN	\$	325,625	\$	325,625	\$	-	\$	253,077	\$	348,820
FEB	\$	312,242	\$	312,242	\$	-	\$	259,775	\$	124,317
MAR	\$	366,860	\$	366,860	\$	-	\$	255,965	\$	276,832
APR	\$	303,014	\$	303,014	\$	-	\$	304,485	\$	196,735
MAY	\$	379,181	\$	379,181	\$	-	\$	235,252	\$	124,900
JUN	\$	318,269	\$	318,269	\$	-	\$	274,741	\$	194,428
TOTALS	\$	4,618,944	\$	4,498,824	\$	120,120	\$	3,525,507	\$	3,490,831

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

2017-2018	TUAL ACTUAL ACTUAL		2020-2021	2021-2022
ACTUAL			ACTUAL	FORECAST
72.1%	92.2%	84.1%	75.8%	102.7%

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

	2			021 2022			2	020 2021	24	010 2020	
2021-2022		20	2021-2022				2020-2021		2019-2020		
MONTH	A	ACTUAL		BUDGET		VARIANCE		ACTUAL		ACTUAL	
JUL	\$	14,068	\$	49,997	<i>\$</i>	(35,929)	\$	53,562	\$	65,692	
AUG	\$	74,642	\$	53,423	\$	21,219	\$	50,187	\$	62,661	
SEP	\$	46,923	\$	45,088	\$	1,835	\$	53,804	\$	46,306	
OCT	\$	47,049	\$	51,048	\$	(3,999)	\$	55,100	\$	70,245	
NOV	\$	42,200	\$	42,200	\$	-	\$	56,242	\$	59,406	
DEC*	\$	39,812	\$	39,812	\$	-	\$	55,608	\$	62,365	
JAN	\$	36,118	\$	36,118	\$	-	\$	11,403	\$	73,157	
FEB	\$	44,037	\$	44,037	\$	-	\$	94,489	\$	57,592	
MAR	\$	38,241	\$	38,241	\$	-	\$	80,240	\$	58,624	
APR	\$	38,834	\$	38,834	\$	-	\$	54,687	\$	57,573	
MAY	\$	40,369	\$	40,369	\$	-	\$	59,398	\$	56,459	
JUN	\$	36,858	\$	36,858	\$	-	\$	50,341	\$	56,502	
TOTALS	\$	499,150	\$	516,024	\$	(16,874)	\$	675,061	\$	726,582	

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

The forecast reflects \$2,282 UNF.

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

The forecast reflects \$245, previously \$568 UNF.

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

The forecast is based on budget.

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

The forecast is based on budget.

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

The forecast is based on budget.

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

The forecast is based on budget.

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

Special Education Transportation is projected to be \$15,103 FAV, previously \$51,352 UNF, based on current student placements.

<u>LINE 23 on Page 3: 5521-GENERAL LIABILITY INSURANCE:</u> Various liability policies, including medical professional, Student Accident insurance and cyberinsurance renewed higher than budgeted-\$15,189 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 \$18,446 FAV. An onboarding software was purchased to digitize hiring forms for \$8,396 UNF. *The account is projected to be \$10,050 FAV*.

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

Tuition is currently forecasted to have a \$310,267 FAV previously \$321,732 FAV variance. The forecast is based on current students and their placements.

Tuition for the vo-ag schools has a projected variance of \$48,303 FAV previously, \$48,303 FAV.

	FY17-18	FY18-19	FY19-20	FY20-21	FY21-22	FY21-22
	ACTUAL	ACTUAL	ACTUAL	ACTUAL	<b>BUDGET</b>	FORECAST
Sound	4	6	6	5	6	3
Trumbull	6	4	4	3	3	1
Nonnewaug	4	6	5	7	7	9(9)
Common						
Ground						
Charter HS	0	0	0	1	1	1
Betsy Ross						
Magnet	0	0	0	0	1	$\theta(\theta)$
King						
Robinson						
Magnet	0	0	0	0	0	0
Engineering						
Science						
Magnet	1	0	0	0	0	0
Highville						
Charter			0	0	0	0
School	1	0				
Totals	16	16	15	16	18	14(14)

ECA is projected variance to be \$11,360 FAV, with two less students enrolled than budgeted.

	FY17-18	FY18-19	FY19-20	FY20-21	FY21-22	FY21-22
	ACTUAL	ACTUAL	ACTUAL	ACTUAL	BUDGET	FORECAST
ECA	19	24	21	16	20	18(18)

Public (ACES) and private out-of-district placements are currently less than anticipated, \$250,604 FAV, previously \$262,069 FAV. There are more outplaced students who recently returned back to District in-house programs or moved out of the District.

	FY17-18 ACTUAL	FY18-19 ACTUAL	FY19-20 ACTUAL	FY20-21 ACTUAL	FY21-22 BUDGET	FY21-22 FORECAST
Public						
SPED	8	11	8	6	14	11(11)
Private SPED	20	22	18	27	25	24(24)

Totals	28	33	26	33	39	35(37)

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

The 2021-2022 budget for electricity assumes the use of 3,189,868 kilowatt hours at an average price of 0.20037 or a cost of \$639,169. Forecast is neutral.

#### **ELECTRICITY (KILOWATT HOURS)**

MONTH	2021-2022 FORECAST	2021-2022 BUDGET	VARIANCE	2020-2021 ACTUAL	2019-2020 ACTUAL
JUL	296,292	253,660	42,632	254,686	306,744
AUG	321,023	287,736	33,287	299,439	298,187
SEP	314,756	303,777	10,979	285,993	255,198
OCT	282,968	282,968	-	248,089	294,827
NOV	262,230	262,230	-	238,583	243,754
DEC	263,699	263,699	-	240,912	250,944
JAN	273,187	273,187	-	249,595	266,227
FEB	268,924	268,924	-	243,774	251,802
MAR	255,252	255,252	-	246,886	217,683
APR	265,084	265,084	-	254,711	232,983
MAY	243,404	243,404	_	244,685	145,568
JUN	229,947	229,947	_	290,054	239,032
Totals	3,276,766	3,189,868	86,898	3,097,407	3,002,949

Note: 2019-2020 Actual Kilowatt Hours during COVID shutdown shown in bold italics.

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

The budget for propane is \$3,546. *The forecast is project to be neutral*.

The budget for water is \$57,350. The forecast is project to be neutral.

Sewer costs are budgeted at \$25,000. The forecast is project to be neutral

#### **DEGREE DAYS**

There are 51 degree days to date compared to 198 last year at this time.

<u>LINE 32 on Page 4: 5420-REPAIRS & MAINTENANCE:</u> The forecast is projected to be \$26,000 UNF, previously neutral. A budget transfer was approved in October to cover an emergency replacement of a failed building control system at Amity Middle School –Orange and to schedule replace for Amity Middle School –Bethany.

#### LINE 35 & 36 on Page 4: 5620 & 5621-OIL & NATURAL GAS:

The budget for natural gas is \$68,171 and the budget for oil is \$41,000. *The forecast is project to be neutral.* 

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

The budget includes a \$100,000 contingency for unplanned, necessary facility expenditures. The forecast assumes these funds will be entirely used. A budget transfer was approved in October to cover an emergency replacement of a failed building control

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system at Amity Middle School –Orange and to schedule replace for Amity Middle School –Bethany. *Current balance is* \$74,000.

#### **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.

#### **COVID ACCOUNTS:**

Year to date, the District has committed \$32,794 which is \$5,599 UNF to purchases related to operating safely during the pandemic. We are once again seeking FEMA funds for the eligible purchases. FEMA has recently changed the eligibility criteria so an application will be submitted soon.

Other grant funding is listed below by fiscal year. Many of these grants required meeting needs that are not budgeted or in response to newly identified needs steming from the pandemic.

GRANT	FY21	FY22	FY23	FY24	TOTAL
ESSER I	\$ 55,040				\$ 55,040
ESSER II		\$ 48,678	\$ 159,307	\$ 36,037	\$ 244,022
ESSER III		\$ 181,212	\$ 361,353		\$ 542,565
Coronavirus Relief					
Funds	\$ 240,120				\$ 240,120
Special Education -					
COVID	\$ 20,000				\$ 20,000
Special Education IDEA-					
ARP (application in					
progress)			\$ 94,631		\$ 94,631
TOTAL	\$ 315,160	\$ 229,890	\$ 615,291	\$ 36,037	\$ 1,196,378

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#### APPENDIX A

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

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

**<u>\$19,268 Cable Advisory Grant:</u>** 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.

**<u>\$49,245 Pegpetia Grant:</u>** 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.

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

**<u>\$7,524 Reduced Trash Pickups:</u>** 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.

**<u>\$300 DMV fees:</u>** The Facitilites staff reviewed motor vehicles fees for registering our vehicles and obtained a waiver as a municipal agency.

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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 <a href="http://www.amityregion5.org/boe/sub-committees/finance-committee2">http://www.amityregion5.org/boe/sub-committees/finance-committee2</a>
- Fiscal Year 2019-2020 \$43,497 <a href="https://www.amityregion5.org/boe/sub-committees/finance-committee">https://www.amityregion5.org/boe/sub-committees/finance-committee</a>
- Fiscal Year 2018-2019 \$52,451 <a href="https://www.amityregion5.org/boe/sub-committees/finance-committee">https://www.amityregion5.org/boe/sub-committees/finance-committee</a>
- Fiscal Year 2017-2018 \$746,688 <a href="https://www.amityregion5.org/boe/sub-committees/finance-committee">https://www.amityregion5.org/boe/sub-committees/finance-committee</a>
- Fiscal Year 2016-2017 \$595,302 <a href="http://www.amityregion5.org/boe/sub-committees/finance-committee">http://www.amityregion5.org/boe/sub-committees/finance-committee</a>
- Fiscal Year 2015-2016 \$125,911 <a href="http://www.amityregion5.org/boe/sub-committees/finance-committee">http://www.amityregion5.org/boe/sub-committees/finance-committee</a>
- Fiscal Year 2014-2015 \$139,721 <a href="http://www.amityregion5.org/boe/sub-committees/finance-committee">http://www.amityregion5.org/boe/sub-committees/finance-committee</a>

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#### APPENDIX B

#### MONTHLY FORECASTS: PURPOSE, METHODOLOGY, HISTORICAL

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

A forecast is a prediction or estimate of future events and trends. <u>It is only as good as the data available and the assumptions used.</u> 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).

The most recent two fiscal years were significantly impacted by the COVID-19 pandemic. School operations were halted or modified and not at 100% for either year. The District staff took many steps to reserve the general operating budget to meet the demands and brace for the unknown costs. Nearly one million dollars was held from accounts to prepare for operations in fiscal year 2021. Grant funding from State and Federal sources became available during the year. These funds were used to offset unexpected costs and plan for the future costs. Some of the funds do not expire until September 2024. The administration is planning to use funds as required by grant guidelines while limiting the impact to future budgets.

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).

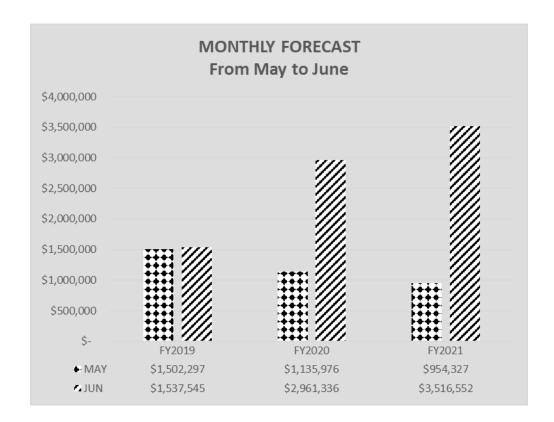
Revenues can be most impacted by decisions made at the State level for Special Education and Transportation grants. We have seen the reimbursement rate change in mid-year.

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.

#### **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 Govenor 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, gradutation 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.

#### FY2021:

The <u>unaudited</u> fund balance for 2020-2021 is \$2,483,748 after designating \$185,600 for items cut from the FY22 budget, \$339,360 for end of year purchases (security and technology) and \$507,844 proposed for capital nonrecurring account. **The change is** \$2,991,592 higher than the prior month's forecast. The major reasons for the significant increase in the yearend fund balance was the continuing unsettled environment of the COVID-19 global pandemic. The changes from one month to the next month are summarized as follows:

- \$609,645: Medical & dental claims were lower and the assumption is it is due to the COVID-19 global pandemic. Routine office visits and medical tests may not have resumed to normal levels. Since we are self-insured, actual claims are not known until the end of the fiscal year.
- \$260,880 Purchased services were lower due to the COVID-19 global pandemic. There were fewer athletic contests, which reduced the annual number of game day staff and officials paid. Less costs were incurred for special education than anticipated.
- \$147,390: Transportation and fuel costs for busses were lower due to the COVID-19 global pandemic. There were no field trips or late runs during the year. As the schools edged toward operating at 100% it was difficult to predicate if transportation needs would increase in May and June. There were also a reduced number of athletic trips. The fuel bills from the member towns are not finalized until mid-July. The final invoices were less than allotted.
- \$111,272: Instructional supplies and maintance 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. Grant funding became available to reimburse \$96,980 of cleaning supplies.

#### APPENDIX C

#### **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.

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

The <u>audited</u> fund balance for 2018-2019 is \$2,034,101 plus \$409,259 designated at yearend 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.

14

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 coshare contributions.

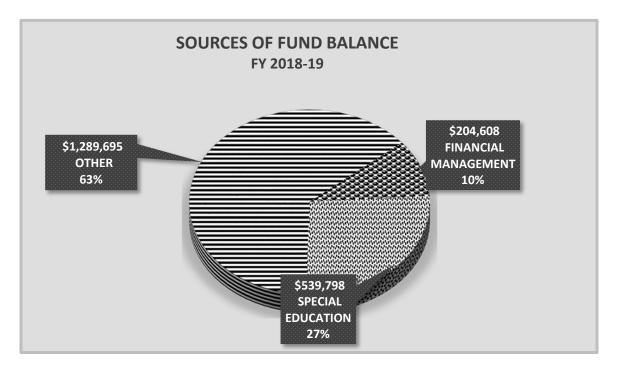
**\$378,012 REVENUE**: The Special Education Grant was higher than budgeted by \$224,297 based on actual special education costs and a higher reimbursement rate. The interest earned on the District's accounts was \$100,966 more than budgeted as interest rates were higher than budgeted. These accounts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

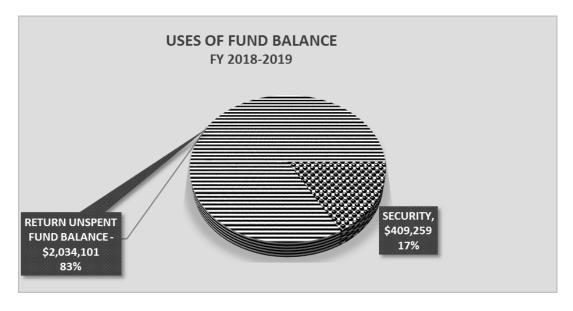
The primary sources of the fund balance are shown graphically below:



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

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

#### APPENDIX D

#### **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.

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

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-existant and only a few conferences were held (via remote features).

#### **FINANCIAL MANAGEMENT:**

\$ 107,610

The turnover factor exceed the budget by \$70,559. Administrators carefully consider salary placement for new hires. Some part-time vacancies were not filled during the shutdown. 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 activites 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.

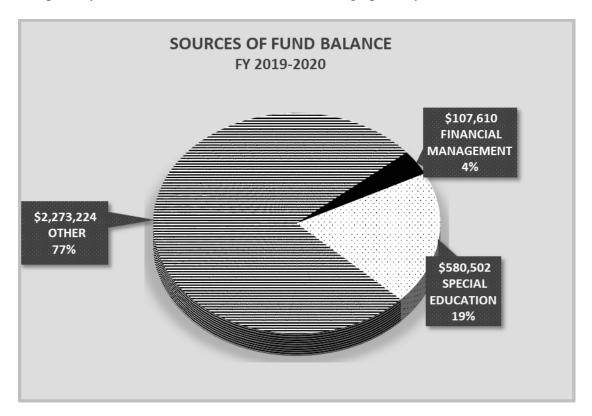
**\$93,339 UTILITIES (OTHER):** A mild winter combined with fuel cell operating properly to supply heat generated savings of \$17,731 FAV. Electricity usage was down due to the reduced occupancy in buildings, \$70,089 FAV.

**\$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 accomodations 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, phototgraphy 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 Approved for Capital Reserve
- 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.

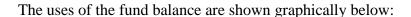
**\$495,482 (1%) CAPITAL AND NONRECURRING ACCOUNT:** The Amity Finance Committee and Board of Education approved moving forward in the process to transfer 1% of the FY20 budget surplus into the Capital and Nonrecurring account.

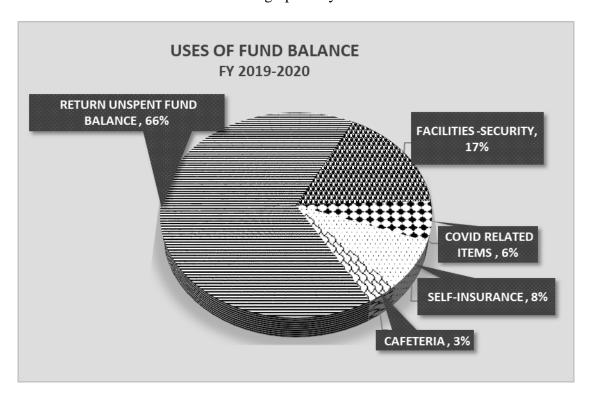
#### \$515,077 END OF YEAR PURCHASES (EOY):

\$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.





## **Return Unspent Fund Balance:**

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

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

#### **APPENDIX E**

## **RECAP OF 2020-2021**

## Return Unspent Fund Balance:

The cancellation of 2019-2020 encumbrances of \$352,364 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. The final quarter of FY20 was a period of shut down making it difficult to determine the need for open orders and there was a substantial amount of unemployment claims in dispute. 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 2020-21, the funds will be returned.

Bethany	\$ <b>64,6</b> 80
Orange	\$179,241
Woodbridge	<i>\$108,444</i>
Total	\$352,364

The <u>unaudited</u> fund balance for 2020-2021 is \$2,483,748 after designating \$185,600 for items cut from the FY22 budget, \$339,360 for end of year purchases (security and technology) and \$507,844 approved for capital nonrecurring account. These source of the available funds are described below.

#### FINANCIAL MANAGEMENT:

\$ 578,763

Our efforts to foster a District culture of finding cost savings and efficiencies has been successful producing savings of \$128,708. Grant money was applied for and awarded to offset the cost of the CEN for savings of \$27,440, \$49,245 Pegpetia Grant for course equipment and supplies, \$28,339 for polycarbonate dividers manufactured in-house. \$968,619 was withheld in general fund accounts in preparation for operating in a pandemic environment. These funds were redistributed as needed and it was difficult to predict all throughout the year how much funds would be needed to keep schools open. The District operating under many scenarios, remote, hybrid, shortened days and full days. All operations were subject to constant change during the year making forecasting difficult.

**\$194,873 SALARIES** (FINANCIAL MANAGEMENT): The administration worked closely with bargaining units to develop options for remote work to keep all staff employed. The administration hired an additional number of bench subs including college students (allowed under executive order) to maintain our own pool of substitutes rather than contracting for more outside services.

**\$255,182 GRANTS AWARDS (FINANCIAL MANAGEMENT):** The administration closely tracked expenses related to the pandemic and applied for funding under various grants. \$255,182 of expenses were credited to the general operation and charged to appropriate grants.

#### **SPECIAL EDUCATION:**

\$1,078,971

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. Transportation budget was \$488,891 FAV and the tuition budget was \$240,380 FAV.

**\$349,700 REVENUE (SPECIAL EDUCATION)**: The Special Education Grant was higher than budgeted by \$349,700 based on actual special education costs and a higher reimbursement rate. The interest earned on the District's accounts was \$31,662 less than budgeted as interest rates were less than budgeted. Building rental and athletics events generated no income due to COVID-19 pandemic and offset the gain in special education revenue.

OTHER: \$ 1,877,084

\$1,315,946 MEDICAL (OTHER): The net balance of the medical account was under budget. Claims and fees were significantly lower than budgeted, \$1,125,718, amounting to only 75.8% of expected claims. The assumption is members were still hesitant to get routine care because of the pandemic. There were some other savings with other components of the account including employer contributions to HSA accounts, retiree payments, and employee co-share contributions.

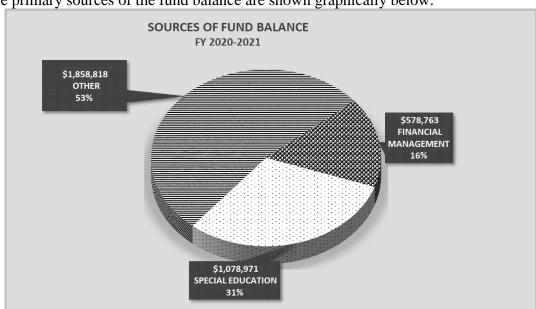
**\$212,213 TRANSPORTATION (OTHER):** Transportation costs including fuel were reduced since no late busses were offered during the year, fewer athletic trips and no field trips requiring bus services were scheduled due to the pandemic.

\$192,377 SUPPLIES: Instructional supplies and maintenance supplies were underbudget. The teaching staff adjusted purchases for remote and hybrid learning. \$96,980 was reimbursed through grants.

**\$111,272 UTILITIES (OTHER):** The buildings did not operate under full capacity for most of the year and there were no building rentals, limited evening activites and many more outside events.

**\$102,300 PROFESSIONAL TECHNICAL SERVICES (OTHER):** Athletic services were reduced for officials and game day workers and special education services were less than budgeted. These savings were offset by higher legal costs.

**\$96,312 STAFF TRAVEL, CONFERENCES AND DUES & FEES (OTHER):** Staff travel was not necessary with remote options and 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 school year. Less entry fees for athletics also reduced fees.

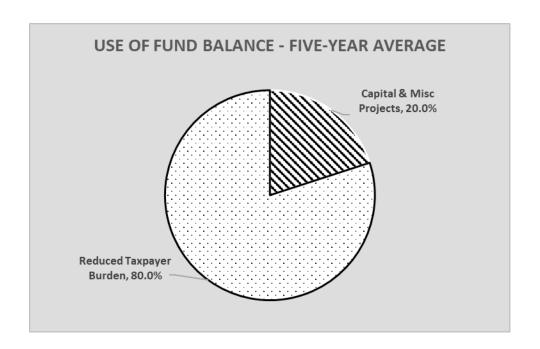


The primary sources of the fund balance are shown graphically below:

The use of the fund balance was designated as follows:

- 1. \$187,600 was designated in items removed from the 21-22 budget
- 2. \$339,360 was designated for security and technology items eligible for grant reimbursement.
- 3. \$507,844 approved for capital nonrecurring projects to offset future budgets.
- 4. \$2,483,748 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 would be returned to the Member Towns, as follows:

Town of Bethany	\$ 449,260
Town of Orange	\$1,248,034
Town of Woodbridge	<i>\$ 786,454</i>
Total	\$2,483,748

#### Amity Regional School District No. 5 - Budget Transfers 2021-2022

MONTH/YR	JNL#	ACCOUNT NUMBER & DESCRIPTION	AMOUNT	DESCRIPTION
JUL				
2022-July	129	05-13-2212-5581 TRAVEL - CONFERENCES	, ,	INCREASE IN STAR TESTING
2022-July	129	05-13-2212-5611 INSTRUCTIONAL SUPPLIES	400.00	INCREASE IN STAR TESTING
AUG				
2022-Aug	91	03-14-2600-5613 MAINTENANCE/CUSTODIAL SUPPLIES		UHAUL TRUCK RENTAL
2022-Aug	91	03-14-2600-5440 RENTALS-LAND,BLDG,EQUIPMENT	133.00	UHAUL TRUCK RENTAL
SEPT				
2022- Sept	11	01-11-1010-5690 OTHER SUPPLIES		add'l classes require keyboard
2022- Sept	11	01-11-1010-5611 INSTRUCTIONAL SUPPLIES		add'l classes require keyboard
2022- Sept	66	05-14-2350-5690 OTHER SUPPLIES		Upgrade SNAP Software
2022- Sept	66	01-13-2130-5690 OTHER SUPPLIES		Upgrade SNAP Software
2022- Sept	66	02-13-2130-5690 OTHER SUPPLIES		Upgrade SNAP Software
2022- Sept	66	03-13-2130-5690 OTHER SUPPLIES		Upgrade SNAP Software
2022- Sept	356	03-11-3202-5420 REPAIRS, MAINTENANCE & CLEANING		Swim Timing Purchase
2022- Sept	356	03-11-3202-5731 EQUIPMENT - REPLACEMENT		Swim Timing Purchase
2022- Sept	360	02-13-2400-5330 OTHER PROFESSIONAL & TECH SRVC		REPLACE WEIGHT ROOM FLOOR
2022- Sept	360	02-13-2400-5590 OTHER PURCHASED SERVICES	,	REPLACE WEIGHT ROOM FLOOR
2022- Sept	360	02-13-2400-5420 REPAIRS,MAINTENANCE & CLEANING	2500.00	REPLACE WEIGHT ROOM FLOOR
OCT				
2022- Oct	77	01-11-1007-5611 INSTRUCTIONAL SUPPLIES	, ,	Health PD Transfer
2022- Oct	77	01-11-1007-5810 DUES & FEES		Health PD Transfer
2022- Oct	119	02-11-1010-5611 INSTRUCTIONAL SUPPLIES	, ,	PURCHASE A KEYBOARD(MUSIC)
2022- Oct	119	02-11-1010-5730 EQUIPMENT - NEW		PURCHASE A KEYBOARD(MUSIC)
2022- Oct	130	05-14-2700-5512 VO-AG/VO-TECH REG ED		TRANSPORTATION NONNEWAUG HS
2022- Oct	130	05-14-2700-5513 IN DISTRICT PRIVATE REG ED	, ,	TRANSPORTATION NONNEWAUG HS
2022- Oct	267	03-13-2400-5581 TRAVEL - CONFERENCES		PowerSchool Wrkshp-F. Barretta
2022- Oct	267	03-13-2400-5580 STAFF TRAVEL	,	PowerSchool Wrkshp-F. Barretta
2022- Oct	329	02-13-2120-5590 OTHER PURCHASED SERVICES		STUDENT RECORD FILE FOLDERS
2022- Oct	329	02-13-2120-5581 TRAVEL - CONFERENCES	,	STUDENT RECORD FILE FOLDERS
2022- Oct	384	01-11-1014-5810 DUES & FEES	,	HISTORY CLASSROOM SUPPLIES
2022- Oct	384	01-11-1014-5611 INSTRUCTIONAL SUPPLIES	100.00	HISTORY CLASSROOM SUPPLIES

<sup>180 of 183</sup> 154 of 222

# 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

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 2021-22

Date: November 2, 2021

# **Operations/Technology:**

The high school administration has requested the purchase of 10 vape sensors. Each sensor is \$1,047.00 and the total is \$10,470.00. This pricing is from the PEPPM consortium bid and meets the purchasing criteria.

The sensors will be placed in the restrooms. These particulars sensors have 12 unique detection sensors that work in conjunction to detect a multitude of measurements with unlimited customization. Built with air flow in mind, the unit's design allows the sensors to pick up harmful chemicals faster to alert the administration when the vaping products are in use. Use of vaping products violates the Student Handbook and Board Policy.

#### **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 10 vape sensors at Amity Regional High School.

ACCOUNT			
<b>NUMBER</b>	ACCOUNT NAME	FROM	TO
05-15-0000-5850	Contingency	\$10,470	
05-14-2350-5730	Equipment - New		\$10,470

<sup>181 of 183</sup> 155 of 222

ORG	ORG/PER	ACCOUNT	ACCOUNT DESCRIPTION	Description	ORIGINAL APPROP	TRANFRS/ADJSMTS	REVISE	D BUDGET	YTE	D EXPENDED	ENC	UMBRANCE		AILABLE DGET	VENDOR NAME	COMMENT
	,		IMPROVEMENTS			,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,										
00150047	00150047		TO SITES	Athletics	3,167,960	170,646	ė .	2 220 606	ċ	2,846,292.47	ė	32,615.24	ć	459,698.29		
2021	3				3,107,300	241406		3,338,000	\$	175,500.00	٠,	32,013.24	<del>ب</del>	455,056.25	FIELDTURF	ATHLETIC TURF
2021	4					241400			\$	173,300.00			-		FIELDTURF	ATHLETIC TURF
2021	4					241400			\$	35,199.90			-		FIELDTURF	ATHLETIC TURF
2021	4	103	10/20/2020	AFI		241400	,		٦	33,133.30			-		FIELDTORF	ATTILETIC TORF
			12/04/2020			254445			Ś	500.00					LO MALANIDECADINE	Comice Field 2 Duniont
2021		204	12/04/2020	ADI		251145			-				-		J & M LANDSCAPING	Service - Field 3 Project
2021	9		03/30/2021			241406			\$	434,691.00			-		FIELDTURF	ATHLETIC TURF
2021	11					241406			\$	101,700.00			-		FIELDTURF	ATHLETIC TURF
2021	12					251842			\$	63,673.45	-		-		FIELDTURF	ATHLETIC TURF
2021	12		06/08/2021			241406			\$	909,000.00			-		FIELDTURF	ATHLETIC TURF
2022	2		08/02/2021			241406			\$	483,335.10	-		-		FIELDTURF	ATHLETIC TURF
2022	2					251842			\$	58,500.19			-		FIELDTURF	ATHLETIC TURF
2022	3					241406			\$	379,987.19	-		-		FIELDTURF	APPLICATION 9
2022	3					252036			\$	14,800.64	-		-		FIELDTURF	APPLICATION 9
2022	3			. API		251842	2		\$	16,155.00	-		-		FIELDTURF	APPLICATION 9
			IMPROVEMENTS				١.				١.		١.			
00150048	00150048	0048-5715	TO BUILDINGS	HVAC	1,830,630	171,967	7 \$	2,002,597	\$	1,838,756.85	\$	64,211.00	\$	99,629.15		
															SAV-MOR COOLING &	SERVICE - CONTRACT -
2020	12	79	5/22/2020	API		241814	1		\$	14,725.00					HEATING INC	AMITY HIG
															SAV-MOR COOLING &	SERVICE - CONTRACT -
2021	1	140	07/17/2020	API		241814	1		\$	196,555.00	Υ				HEATING INC	AMITY HIG
															SAV-MOR COOLING &	SERVICE - CONTRACT -
2021	3	184	09/01/2020	API		241814	1		\$	275,321.91	Υ				HEATING INC	AMITY HIG
															SAV-MOR COOLING &	SERVICE - CONTRACT -
2021	3	184	09/01/2020	API		241814	1		\$	50,416.67	Υ				HEATING INC	AMITY HIG
															SAV-MOR COOLING &	SERVICE - CONTRACT -
2021	3	4	09/01/2020	API		241814	1		\$	80,199.00	Υ				HEATING INC	AMITY HIG
															SAV-MOR COOLING &	SERVICE - CONTRACT -
2021	6	298	12/09/2020	API		241814	1		\$	1,662.50	Υ				HEATING INC	AMITY HIG
															SAV-MOR COOLING &	SERVICE - CONTRACT -
2021	7	37	01/07/2021	API		241814	1		\$	33,072.64	Υ				HEATING INC	AMITY HIG
			, , , ,							,-					SAV-MOR COOLING &	SERVICE - CONTRACT -
2021	10		04/30/2021	API		251440	)		\$	21,330.00	Y				HEATING INC	AMITY HIG
2021	11		05/04/2021			250900			Ś	5,699.76	-				VANZELM ENGINEERS	SERVICES HVAC
			03/01/2023	.,,		250500	1		~	3,0330	†		$\vdash$		SAV-MOR COOLING &	SERVICE - CONTRACT -
2021	12	56	06/08/2021	ΔΡΙ		251440	)		Ś	14,665.00	Y				HEATING INC	AMITY HIG
2021	12					250900			\$	2,472.50			$\vdash$		VANZELM ENGINEERS	SERVICES HVAC
			00, 10, 2023	.,,		250500	1		~	2, 2.50	†		$\vdash$		SAV-MOR COOLING &	SERVICE - CONTRACT -
2021	12	338	06/30/2021	ΔΡΙ		251440	)		\$	365,315.00	V				HEATING INC	AMITY HIG
2021	12					250900			\$	847.50	-				VANZELM ENGINEERS	SERVICES HVAC
2021	12	03	00/30/2021	ALI		250500	,		7	047.50	<u> </u>				VANZELM	JERVICES IIVAC
2022	3	155	08/30/2021	ΔΡΙ		251875			\$	980.24					COMMISSIONIN	SERVICE - ADMIN SRVCS
2022		133	08/30/2021	AFI		231073	,		۰	300.24			$\vdash$		VANZELM	SERVICE - ADIVINA SILVES
2022	3	162	08/30/2021	ADI		260544	,		Ś	1,309.76					COMMISSIONIN	SERVICE - ADMIN SRVCS
2022	3	102	00/30/2021	Ari	+	200544	•		ې	1,303.70	-		-		SAV-MOR	CONTRACT - AMITY
2022	3	57	09/09/2021	ADI		251440			Ś	412,185.00					COOLING&HEAT	HIGH AHU
2022	3	57	05/05/2021	Ari	+	231440	,		ې	412,103.00	-		-		SAV-MOR	THOTT AND
2022	-	370	00/00/2024	ADI		354440	,		۲	247 200 00						ADD F
2022	3	278	09/09/2021	. API	+	251440	,		\$	347,280.00	-		-		COOLING&HEAT	APP 5 SERVICE - HVAC RENTAL
2022	-	370	00/20/202	ADI		300077	,		۲	400.03					MODILE AID DOWED SEA	
2022	3	376	09/28/2021	. API	+	260677	<u>'</u>		\$	188.02	-		-		MOBILE AIR POWER REN	
	_		00/00/				_			=						SERVICE - HVAC RENTAL
2022	3	376	09/28/2021	. API		260677	/		\$	76.50	-		-		MOBILE AIR POWER REN	
							_									SERVICE - HVAC RENTAL
2022	3	376	09/28/2021	. API		260677	/		\$	1,921.33			1		MOBILE AIR POWER REN	bala
2022	3	388	09/28/2021	. API		252002	2		\$	5,576.00					MOBILE AIR POWER REN	SERVICE - HVAC RENTAL

ORG	ORG/PER	ACCOUNT	ACCOUNT DESCRIPTION	Description	ORIGINAL APPROP	TRANFRS/ADJSMTS	REVISED BUDGI	т үт	D EXPENDED	ENC	CUMBRANCE		AILABLE DGET	VENDOR NAME	COMMENT
2022	3	388	09/28/2021	A DI		252002		\$	6,337.52					MODILE AID DOWED DEN	SERVICE - HVAC RENTAL
2022			10/15/2021			260544		\$						VANZELM ENGINEERS	SERVICES HVAC
2022			IMPROVEMENTS	ALL		200544		7	020.00					VANZELIVI LIVOINELIUS	SERVICESTIVAC
00150049	00150049		TO BUILDINGS	Chillers	140,000	o	\$ 140,00	0 \$	136,822.00	Ś		\$	3,178.00		
														TRANE BUILDING	
2021	3			API	329846	241572	115945	\$	136,822.00	Υ				SERVICES	SERVICE - Contract HVA
	00450050		IMPROVEMENTS		500.000	50.440							22 525 22		
00150050	00150050	0050-5/15	TO BUILDINGS	Paving	600,000	-59,140	\$ 540,86	0 \$	507,253.80	\$	•	\$	33,606.20	B & W PAVING &	
2021	3	184	09/01/2020	ADI	372188	242291	116171	\$	270 514 90					LANDSCAPING, LLC	SERVICE - PARKING LOT
2021	3	184	09/01/2020	API	3/2188	242291	1161/1	, \$	270,514.80	+		-		LANDSCAPING, LLC	SERVICE - PARKING LOT
2022	1	57	07/15/2021	ADI	372468	260252	\$ 122,53	2 6	60,000.00					H AND L PAVING, LLC	SERVICE - PARKING LOT
2022	1	37	07/13/2021	AFI	372408	200232	7 122,50	ر ۲	00,000.00					IT AND L FAVING, LLC	SERVICE - PARKING LOT
2022	3	388	09/28/2021	ΔΡΙ	372468	252039		\$	132,974.00					H AND L PAVING, LLC	PHAS
2022		300	03/20/2021	ALL	372400	252055		٦ ا	132,374.00					IT AND ET AVING, LLC	SERVICE - PARKING LOT
2022	3	388	09/28/2021	ΔΡΙ	372468	260252		\$	29,815.00					H AND L PAVING, LLC	PHAS
2022		300	03/20/2021	7.11	372400	200252		<b>-</b>   *	25,015.00					117410 21711110, 220	SERVICE - PARKING LOT
2022	3	388	09/28/2021	ΔΡΙ	372468	260251		Ś	13,950.00					H AND L PAVING, LLC	PHAS
2022		300	OTHER	7.11	372400	200251		7	13,330.00					117410 21711110, 220	111/10
		17 -00-15-	PROFESSIONAL &												
00150051	00150051	0051-5330	TECH SRVC	соі	108,018	-39,156	\$ 68,86	2 5	68,862.12	Ś	-	\$	_		
		0002 0000			100,010	03,200	φ σο,στ	-   <del>-</del>	00,002.11	1		1			ANALYTICAL SERVICES
2021	1	72	07/17/2020			250130		\$	15,500.00					S & P RATINGS	WITH U
	_		0.7=.7===					1							PROFESSIONAL SERVICE
2021	1	72	07/17/2020			250133		Ś	21,700.00					DAY PITNEY LLP	BOND
			.,,					<u> </u>	,						FINAL OFFICIAL
2021	1	138	07/17/2020			250139		\$	394.52					TECHNIQUE PRINTERS I	STATEMENT -
			.,,					<u> </u>							FINANCIAL ADVISORY
2021	1	139	07/17/2020			250188		\$	26,000.00					HILLTOPSECURITIES	FEES, D
															CERTIFYING, REGISTRAP
2021	2	10	08/03/2020			250131		\$	4,000.00					US BANK	TRA
															ONLINE LEGAL AD-
2021	3	4	09/01/2020			250454		\$	500.00					ARIZENT	NOTICE OF
															BOND ISSUE 2020
2021	5	68	11/09/2020			250958		\$	767.60					IPREO, LLC	\$6,570,000
		17 -00-15-	IMPROVEMENTS												
00150052	00150052	0052-5715	TO BUILDINGS	Acoustics	245,000	0	\$ 245,00	0 \$	5,850.00	\$	68,745.00	\$	170,405.00		
															SERVICE - PROJECT
2021	4	196	10/07/2020			250798		\$	2,150.00					COTE ACOUSTICAL CONS	
															SERVICE - PROJECT
2022	3					250798		\$	3,700.00					COTE ACOUSTICAL CONS	ACOUSTIC
		17 -00-15-	IMPROVEMENTS												
00150053	00150053	0053-5715	TO BUILDINGS	Contingency	478,392	-244,317	\$ 234,07	5 \$	-	\$	-	\$	234,074.88		
			Total Bond							1.		١.			
			Projects		6,570,000	0	\$ 6,570,00	0   \$	5,403,837.24	\$	165,571.24	\$	1,000,591.52		

<sup>183 of 183</sup> 157 of 222

#### <u>Personnel – Certified</u>

**Tutoring** 

4134

#### Personnel -- Certified

## **Tutoring**

No teacher shall tutor a student in any of his/her classes which will result in a subsequent reimbursement. Any tutoring work involving an Amity student by an Amity teacher in the same school must first have administrative approval. It is also suggested that the original teacher be notified as a courtesy if a student is tutored by another teacher of the same school.

The instruction of students in a teacher's class shall be part of his/her regular duty. These students shall be entitled to all the reasonable amount of time that is needed or can be given to them. No teacher shall teach privately (tutor) students of any school where such teacher has classes. This shall not apply to teachers employed by the Board of Education (Board) who are providing homebound instruction to Amity Regional School District No. 5 (ARSD) students. It is also suggested that the classroom teacher be notified as a courtesy, if a student is tutored by another teacher from within ARSD.

(cf. 61/4 – Summer S	School re: Tutoring)
Legal Reference:	—:Connecticut General Statutes
53-392a - 53-392e Al	l related to academic crimes.
	53-392b — Preparation -of -assignments -for -students -attending -educational institutions prohibited.

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

P	4	13	4

<u> Personnel – Certif</u>	<u>ied</u>	
<b>Tutoring</b>		
Dollary adapted	Amil 10, 2006	AMITY REGIONAL SCHOOL DISTRICT NO
Policy adopted: Woodbridge, Conne	cticut	AWITT REGIONAL SCHOOL DISTRICT NO

# Personnel - Certified/Non-Certified

## **Organizations and Units**

4234

#### Personnel - Certified/Non-Certified

Organizations/Units

## **Staff** Teacher—Administrators—Board of Education Relationships

The Board of Education recognizes the right of employees to join or not join employee organizations under provisions of law, and that such organizations, if formed, may enter into collective negotiations with the Board of Education on topics specified in law. In all other areas, the laws of the State of Connecticut and the policies and regulations of the school system are binding on school system employees. The Board of Education has the final responsibility of establishing policies for the school system. The Superintendent, with Board approval, sets forth the regulations under which the school system functions, and the Superintendent and staff have the responsibility of carrying out the policies and regulations established.

Providing a high quality education for children is the paramount aim of this school system, and good morale in the teaching staff is necessary for the best education of the children. Therefore, the Amity Regional School District (ARSD) Board of Education (Board) encourages participation of staff members in activities of their professional organizations and encourages organizations to exercise their rights and responsibilities clearly established by law:

- 1. The Board of Education, under law, has the final responsibility of establishing policies for the school system.
- 2. The Superintendent and staff have the responsibility of carrying out the policies established.
- 3. The certified teaching personnel have the ultimate responsibility for providing excellent education in the classroom.

## **Attainment of Goals**

Attainment of goals and objectives of the educational program conducted in the <u>ARSD</u> schools requires mutual understanding and cooperation among the Board of Education, the Superintendent and management administrative staff, the certified and personnel, the non-certified personnel, and other citizens of the community. <u>To this end, fF</u>ree and open exchange of views is desirable, proper, and necessary.

Policy adopted: April 10, 2006 — AMITY REGIONAL

SCHOOL DISTRICT NO. 5

## <u>Personnel – Certified/Non-Certified</u>

## **Organizations and Units**

# **Teachers and Teachers' Organization**

Teachers have the right to join, or to refrain from joining, any organization for their professional or economic improvement and for the advancement of public education; but membership in any organization shall not be required as a condition of employment of a teacher in the ARSD.

## **Employee Organizations**

All employees are free to join or not join employee organizations. \_Decisions affecting the individual employee are made without regard to membership or non-membership in such organizations. \_Each employee is entitled to <a href="https://example.com/his/her">his/her</a> individual legal or ethical rights and privileges.

ARSD will not deduct "agency fees" from a non-members wages, nor may a union otherwise collect "agency fees" from a non-member, without the non-member employee's affirmative consent.

Employees shall not be interfered with, intimidated, restrained, coerced, or discriminated against either by the school systemARSD or by employee organizations because of their membership or non-membership in employee organizations. They shall have the right to participate through representatives of their own choosing in the presentation of their views to the Board of Education.

Employee organizations which meet the provisions of the law and the policies of the school system shall have the right to represent their members in matters within the scope of the law.

## **Policy Development and Review**

The Superintendent shall consult with appropriate personnel and employee organizations in suggesting and establishing desired policies and regulations relating to Board of Education-teacher-administrator relationships and in other matters as provided by law.

The Board will annually review policies and will consider suggested revisions or additions, which will improve these relationships and promote the educational welfare of the children attending the ARSD schools.

#### **Agreements**

Policy adopted: April 10, 2006 ——AMITY REGIONAL

SCHOOL DISTRICT NO. 5

## <u>Personnel – Certified/Non-Certified</u>

## **Organizations and Units**

All articles included in negotiated agreements with employees shall have the effect of Board policy. In cases of conflict between negotiated agreements and Board policies or administrative regulations, the agreements shall take precedence.

## **Bargaining Units**

<u>Unit clarification petitions concerning the appropriate composition of an existing bargaining unit</u> shall be filed with the Commissioner of Education.

## Filing of Education Administrative Personnel Contracts

The Board will file, in accordance with the requirement of Section 157 of June Special Session,
Public Act 17-2, a signed copy of any contract for administrative personnel with the Town Clerk
who shall post a copy of such contract on the Town's website. (A regional board of education shall
file a copy of such contract with town clerk in each member town, and town clerk shall post a copy
of the contract on the Town's website.)

"A signed copy of any contract for administrative personnel" is interpreted as referring to: (1) any collective bargaining agreement with administrators and (2) any individual signed employment contracts for administrative personnel.

Legal Reference: <u>Connecticut General Statutes</u>

10 153a Rights concerning professional organization and negotiations.

10 153b Selection of teachers' representatives.

10 153c Disputes as to elections.

10 153e Strikes prohibited. Interference with the exercise of employees'

rights prohibited.

46a 60 Discriminatory employment practices prohibited.

June 2017 Special Session PA 17-2, Section 157

Janus v. AFSCME Council 31.585 U.S. 138 S. Ct. 248 (June 27,

2018)

**Connecticut General Statutes** 

7-467 et. seq. Municipal Employees Relations Act

46a-60 Discriminatory employment practices prohibited

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

Policy adopted: April 10, 2006 — AMITY REGIONAL

SCHOOL DISTRICT NO. 5

Woodbridge, Connecticut

A policy pertaining to non-bargaining unit employees.

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

Compensation and Related Benefits for Non-Bargaining Unit Employees (excluding Superintendent, Assistant Superintendent, and Directors)

The Superintendent and his/her designee will develop guidelines, in the form of administrative regulations, concerning the compensation and benefits of non-bargaining unit employees (excluding the Superintendent, Assistant Superintendent, and Directors). The compensation and benefits of such employees will be reviewed and determined, annually, by the Board prior to the new fiscal year.

## Another version to consider:

Each spring, the Superintendent shall submit to the <u>Amity Regional School District No. 5 (ARSD)</u> Board of Education (<u>Board</u>) recommended salaries of all employees not covered by collective bargaining agreements. \_The recommendations by the Superintendent shall be based on four (4) factors:

- 1. employee performance evaluations;
- 2. prevailing—\_wages—\_and—\_salaries –of –personnel—\_occupying—\_similar –positions—\_<u>m</u>—<u>in</u> the geographical area;
- 3. contractual settlements with various Board of Education bargaining units;
- 4. individual salary adjustments necessary to maintain an appropriate wage or salary spread among personnel.

The Board shall review the Superintendent's recommendations and, based on the four factors listed above, vote on the wages or salary of these employees.

Contract agreements must be executed accordingly and signed by the Board President and employee.

## **Transgender and Gender Non-Conforming Youth**

#### **Purpose**

Federal and state law and Amity Regional School District No. 5 (ARSD) policy require that all programs, activities, and employment practices be free from discrimination based on sex, gender, gender identity, gender expression, and sexual orientation.

This policy sets out guidelines for schools and ARSD staff to address the needs of transgender and gender non-conforming students and clarifies how state law should be implemented in situations where questions may arise about how to protect the legal rights or safety of such students. This policy does not anticipate every situation that might occur with respect to transgender or gender non-conforming students; and the needs of each transgender or gender non-conforming student must be assessed on a case-by-case basis. In all cases the goal is to ensure the safety, comfort, and healthy development of the transgender or gender non-conforming student while maximizing the student's social integration.

#### **Definitions**

The definitions provided here are not intended to label students but rather to assist in understanding this policy and the legal obligations of ARSD staff. It is recognized that students might or might not use these terms to describe themselves.

- "Gender identity" is a person's deeply held sense or psychological knowledge of their own gender, regardless of the gender they were assigned at birth. One's gender identity can be the same or different than the gender assigned at birth. Everyone has a gender identity.
- "Transgender" describes people whose gender identity, expression, or behavior is different from those typically associated with an assigned sex at birth.
- "Gender expression" refers to the manner a person represents or expresses gender to others often through behavior, clothing, hairstyles, activities, or mannerisms.
- "Gender non-conforming" describes people whose gender expression differs from stereotypical expectations, such as "feminine" boys, "masculine" girls, and those who are perceived as androgynous. This includes people who identify outside traditional gender categories or identify both genders.
- "Gender Transition" is the process in which a person changes their gender expression to better reflect their gender identity.

## **Privacy**

All persons including students have a right to privacy. This includes the right to keep private one's transgender status or gender non-conforming presentation at school. Information about a student's transgender status, legal name, or gender assigned at birth also may constitute confidential medical information. School personnel should not disclose information that may reveal a student's transgender status or gender non-conforming presentation to others

## **Transgender and Gender Non-Conforming Youth**

including parents/families/legal guardians and other school personnel, unless legally required to do so or unless the student has authorized such disclosure. Transgender and gender non-conforming students have the right to discuss and express their gender identity and expression openly and to decide when, with whom, and how much to share private information.

When contacting the parent, family member, or legal guardian of a transgender or gender non-conforming student school personnel should use the student's legal name and the pronoun corresponding to the student's gender assigned at birth unless the student, parent, family member, or legal guardian has specified otherwise.

#### Official Records

ARSD is required to maintain a mandatory permanent student record ("official record") that includes a student's legal name and legal gender. However, ARSD is not required to use a student's legal name and gender on other school records or documents. In situations where school staff or administrators are required by law to use or to report a transgender student's legal name or gender, such as for purposes of standardized testing, school staff and administrators shall adopt practices to avoid the inadvertent disclosure of such confidential information.

ARSD recognizes under FERPA that students have the right to request the school to change their name and gender on such student's school records if the student or parent/family member/ legal guardian, if such a student is under 18 years of age, believe the records are incorrect, misleading, or violate a student's privacy. (In general, a school should treat requests to change student records based on transgender status no differently than it would treat any other request for a change to student records.) Upon such a request schools should correct student education records to accurately reflect the student's declared name and gender identity, regardless of whether the student has completed a legal name change.

#### **Confidentiality**

School personnel may not disclose information that may reveal a student's gender identity status, except as allowed by law. Under the Family Education Rights Privacy Act (FERPA) only those school employees with a legitimate educational need may have access to a student's records or the information contained within those records. Disclosing confidential student information to other employees, students, parents/legal guardians, or other third parties may violate privacy laws including, but not limited to, FERPA. Transgender and gender non-conforming students have the ability, as do all students, to discuss and express their gender identity and expression openly and decide when, with whom, and how much of their private information to share with others.

#### **Transgender and Gender Non-Conforming Youth**

## **Student Information Systems**

ARSD shall modify its student information system as necessary to prevent disclosure of confidential information and ensure that school personnel use a student's preferred name and pronouns consistent with the student's gender identity.

#### Names/Pronouns

A student has the right to be addressed by a name and pronoun that corresponds to the student's gender identity. A court-ordered name or gender change is not required, and the student need not change his or her official records.

The intentional or persistent refusal to respect a student's gender identity (for example, intentionally referring to the student by a name or pronoun that does not correspond to the student's gender identity) is a violation of this policy.

# **Gender-Segregated Activities**

To the extent possible schools should reduce or eliminate the practice of segregating students by gender. In situations where students are segregated by gender, such as for selected health education classes, students should be included in the group that corresponds to their gender identity

# **Restroom Accessibility**

Students shall have access to the restroom that corresponds to their gender identity consistently asserted at school. Any student who has a need or desire for increased privacy, regardless of the underlying reason, should be provided access to a single-user restroom. However, no student shall be required to use such a restroom because they are transgender or gender non-conforming.

#### **Locker Room Accessibility**

The use of locker rooms by transgender and gender non-conforming students shall be assessed on a case-by-case basis with the goals of maximizing the student's social integration and equal opportunity to participate in physical education classes and sports, ensuring the student's safety and comfort. In most cases transgender students shall have access to the locker room that corresponds to their gender identity consistently asserted at school like all other students.

Any student, transgender/gender non-conforming or not, who has a need or desire for increased privacy, regardless of the underlying reason, should be provided with a reasonable alternative changing area. Any alternative arrangement should be provided in a way that protects students' ability to keep their gender identity status confidential. In no case shall a transgender or gender non-conforming student be required to use a locker room that conflicts with the student's gender identity.

## **Transgender and Gender Non-Conforming Youth**

## **Physical Education Classes & Intramural Sports**

Transgender and gender non-conforming students shall be permitted to participate in physical education classes and intramural sports in a manner consistent with their gender identity.

## **Interscholastic Competitive Sports Teams**

Transgender and gender non-conforming students shall be permitted to participate in interscholastic athletics in a manner consistent with their gender identity and in compliance with the applicable regulations of the Connecticut Interscholastic Athletic Association (CIAC).

#### **Gender Segregation in Other Areas**

As a general rule in any other circumstances where students are separated by gender in school activities (i.e., overnight field trips) students may be permitted to participate in accordance with their gender identity consistently asserted at school. Activities that may involve the need for accommodations to address student privacy concerns will be addressed on a case-by-case basis.

#### **Dress Codes**

Any student, transgender/gender non-conforming or not, has the right to dress in a manner consistent with their gender identity or gender expression. In general, ARSD schools may not adopt dress codes that restrict students' clothing or appearance on the basis of gender.

#### **Discrimination/Harassment**

It is the responsibility of each school and ARSD to ensure that transgender and gender non-conforming students have a safe school environment. This includes ensuring that any incident of discrimination, harassment, or violence is given immediate attention including investigating the incident, taking appropriate corrective action, and providing students and staff with appropriate resources.

Complaints alleging discrimination or harassment based on a person's actual or perceived transgender status or gender nonconformity are to be handled in the same manner as other discrimination or harassment complaints.

# **Resources for Transgender or Transitioning Students**

If a school staff member observes that a gender identity issue is creating challenges for a student at school or if a student indicates an intention to transition, the staff member shall alert a school counselor and encourage the student to meet with the school counselor if appropriate. School staff shall make every effort to support the student and encourage the support and respect of student peers and staff during school.

## **Transgender and Gender Non-Conforming Youth**

When a student indicates an intention to transition the school counselor, as appropriate, shall offer assistance and provide the student and/or their parents/guardians with information and resources regarding the issues associated with gender identity and expression and/or gender transition. The school counselor shall also provide information regarding gender transition planning at school. The counselor shall coordinate the measures planned and taken at school for supporting the student and creating a sensitive supportive environment at school.

Students who do not want their parents/guardians to know about their gender identity status shall be addressed on a case-by-case basis. The school counselor shall balance the rights of the student needing support and the requirement that parents/guardians be kept informed about their child. In accordance with law parents/guardians and/or the appropriate local officials shall be informed when there is any suspicion of injury or harm to the student or other students.

## **Professional Development**

The Board of Education directs the Superintendent to provide for the training of ARSD staff in transgender sensitivity in what it means to treat all people respectfully and equally. Developmentally age-appropriate training shall also be provided for students.

(cf. 0521 – Affirmative Action Plan/Nondiscrimination)

(cf. 4131 - Staff Development)

(cf. <u>5131</u> - Conduct)

(cf. <u>5131.21</u> – Threats or Acts of Violence)

(cf. 5131.8 – Off-School Grounds Misconduct)

(cf. 5131.91 - Hazing)

(cf. 5131.911 – Bullying and Teen Violence)

(cf. 5145.45 - Nondiscrimination)

(cf. 5145.5 - Sexual and Other Forms of Harassment with Grievance Procedure)

(cf. 6121 - Nondiscrimination)

Legal Reference: Connecticut General Statutes

<u>1</u>-1n "Gender identity or expression" defined.

10-15c Discrimination in public school prohibited. (Amended by P.A.

97-247 to include "sexual orientation" and PA 11-55 to include

"gender identity or expression")

<u>10</u>-222g Prevention and intervention strategy re bullying and teen

dating violence as amended by PA 19-166.

46a-51 Definitions.

<u>46a</u>-58(a) Deprivation of rights. Desecration of property. Placing of

burning cross or noose on property. Penalty.

46a-60 Discriminatory employment practices prohibited Federal Law.

<u>46a</u>-64(a)(1)(2) Discriminatory public accommodations practices

prohibited. Penalty.

10-209 Records not to be public.

# **Transgender and Gender Non-Conforming Youth**

46a-60 Discriminatory employment practices prohibited.

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

Public Act 07-62 An Act Concerning the Deprivation of Rights on Account of Sexual Orientation.

Public Act 11-55 An Act Concerning Discrimination.

Title IX of the Education Amendments of 1972, 20 U.S.C. §1681(a).

Meritor Savings Bank. FSB v. Vinson, 477 U.S. 57 (1986).

Faragher v. City of Boca Raton, No. 97-282 (U.S. Supreme Court, June 26, 1998).

Burlington Industries, Inc. v. Ellerth, No. 97-569, (U.S. Supreme Court, June 26,1998).

Gebbser v. Lago Vista Indiana School District, No. 99-1866, (U.S. Supreme Court, June 26,1998).

Davis v. Monroe County Board of Education, No. 97-843 (U.S. Supreme Court, May 24, 1999).

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

"Guidance on Civil Rights Protections and Supports for Transgender Students," Connecticut State Department of Education, June 2017 Bostock v. Clayton County, Georgia, 140 S.Ct. 1731, 2020 WL3146686 (June 15, 2020)

## Time, Place, and Notification of Meetings

## 1. Regular Meetings

- 2.1. The Board of Education (Board) shall set a calendar of regular meetings for the ensuing year at the first regular meeting in December.
- 3.2. In compliance with the General Statutes of the State of Connecticut, the Chairperson shall file this calendar with the Town Clerk by December 31st, and not later than January 31st.
- 4.3. Normally the Board shall schedule regular meetings on the 2nd Monday of each month of the year.
- 5.4. If at any point in the meeting the Board of Education should not maintain a quorum, then the Chairperson of the Board will adjourn the meeting and declare the time and place of the resumption of the meeting, which shall be reflected in a written order of adjournment. A copy of the written order of adjournment will be posted on or near the door of the place where the meeting was held within twenty—four hours after the time of adjournment.

## **Special Meetings**

- 1. Special meetings may be held when determined by the Board, when so called by the Chairperson, or upon written request of three members of the Board.
- 2. No special meeting shall be held<sub>2</sub>- unless –a –notice –stating- the –time, –place, and purpose of the meeting has been given to each member and to the Town Clerks, twenty-four (24) hours before the time stated for the meeting to convene.
- 3. When a majority of the members agree that an emergency exists, which has made a regular notice impossible, such a meeting may be called at a time or place which may be most convenient. ——In case of such emergency meeting, a copy of the minutes setting forth the nature of the emergency and the proceedings occurring at such meeting shall be filed with the Town Clerk no later than seventy-two (72) hours following the holding of such meeting.
- 4. No other business shall be considered by the Board at that special meeting.

## **Notice of Meetings**

Bylaw adopted: January 9, 2017

Notice of meetings will be mailed to persons filing a written request renewable in January of each year. The Board of Education will charge a fee for these notices based upon cost of the service, as provided by law.

#### Time, Place, and Notification of Meetings

## **Electronic Participation during In-Person Meetings**

Recognizing the inherent responsibility and statutory duties of Board of Education-members, the Board of Education (Board) strongly encourages Board members to attend and participate at meetings of the Board. Though great importance is given to the physical presence of Board members at meetings, the participation of members in an in-person Board meeting by electronic means is authorized whenever physical presence is not practicable. An in-person meeting of the Board-will only be conducted if a quorum of the Board is physically present at the in-person meeting.

Members who participate in an in-person Board meeting through electronic means may notshall be counted in the quorum. Due to security concerns, electronic participation in closed executive sessions will not be permitted. If a Board member electronically joins the meeting after an item of business has been opened, the remotely located member shall not participate until the next item of business is opened.

Any Board member wishing to participate in a meeting electronically will notify the Board Chairperson and Superintendent as early as possible. The Superintendent will arrange for the meeting to take place in a location with the appropriate equipment, so that Board members participating in the meeting electronically may interact and the public may observe or hear the comments made. The Superintendent will take measures to verify the identity of any remotely located participants.

#### **Electronic Meeting of the Board During School District Closures**

Bylaw adopted: January 9, 2017

The Board of Education Board (Board) acknowledges, that during the closure of the Amity Regional School District No. 5 (ARSD) and the ARSD schools, business of the Board may still need to occur. In this event where pressing business of the Board is required such as, but not limited to, personnel issues, budget hearings, approval of bills payments, policies, etc., a meeting through electronic means will be permitted.

- 1. Board of Education members shall make every attempt to participate through a technology portal where they can be viewable, or at a minimum heard, forby each other and members of the public. The Board of Education will accomplish this through use of an electronic videoconferencing program.
- 2. Notice of the Board meeting's virtual location shall be published through the traditional means and outlets as well as being noticed on the DistrictARSD website and in the Board of Education Office no less than 48 hours in advance.
- 3. The DistrictARSD shall post the agenda for the meeting no later than 24 hours in advance for review and reference by members of the public. The agenda will also be posted on the DistrictARSD website.

## Time, Place, and Notification of Meetings

- 4. Members of the public can submit their comments -to -be -added -to -the -public -record-by -emailing- the -Clerk of the Board -of -Education prior to 2:00 pm on the day of the meeting. These comments will be summarized by the Board Chair in the place so designated in the agenda for the meeting. The public may also email the Clerk of the Board by 2:00 pm on the day of the meeting and request to speak during public comment as noted on the agenda. Those members of the public making such request will be provided with the information necessary to join the meeting electronically to provide public comment.
- 5. The DistrictARSD shall provide any member of the public with a physical location and the electronic equipment needed to attend a fully remote meeting in real-time. Members of the public must request this provision by emailing the Clerk of the Board of Education by the close of the last business day before the day of the fully remote meeting.
- 6. Under these circumstances when a Board of Education meeting needs to be held under the circumstances described above, a recording of the meeting with video, in addition to minutes, will be posted in the same way that the audio is posted for traditional, in-person meetings of the Board. These recordings will not stand as the minutes, only the written record as approved will do so.
- 7. The Board shall take the steps necessary for the public to view remote Board meetings and proceedings in real time.
- 8. Executive session will not be conducted during an electronic meeting of the Board.

# Legal Reference: \_\_\_\_\_\_Connecticut General Statutes

1-2001-200 (2) Definitions. "Meeting."

1-2251-206-Denial of access to public records or meetings.

1-225 <u>1-225 Meetings of government agencies to be public, as</u> amended by June 11 Special Session, PA 08-3.

1-226 BBroadcasting or photographing meetings.

1-227 7-Mailing of notice of meetings to persons filing written request.

1-228 1-228 Adjournment of meetings. Notice.

1-229 Continued hearings. Notice.

<u>1-230</u> Regular meetings to be held pursuant to regulation, ordinance or resolution.

1-231 Conduct of meetings.

Bylaw adopted: January 9, 2017

# Time, Place, and Notification of Meetings

Bylaw adopted: January 9, 2017

10-218 Officers. Meetings.
10-238 Petition for hearing by board of education.

## **Community Relations**

## **Communications with the Public**

#### **Parental Involvement**

The Amity Regional District No. 5 (ARSD) Board of Education (Board) recognizes that a child's education is a responsibility shared by the school and family during the entire period the child spends in school. To support the goal of ARSD to educate all students effectively the schools and parents must work as well informed partners.

Although families are diverse in culture, language, and needs, they share ARSD's commitment to the educational success of their students. ARSD and its schools, in collaboration with parents, shall establish programs and practices that enhance parent involvement and reflect the specific needs of students and their families.

To this end ARSD Board supports the development, implementation, and regular evaluation of a parent involvement program in each school that will involve parents at all grade levels in a variety of roles. Such parent involvement policies will include, but not be limited to, the following components:

- Communication and shared information between home and school is regular, two-way, and meaningful.
- Parents are welcome in the school, and their support and assistance are sought.
- Input from parents on significant school-related issues is sought.
- Parents are informed as to how they can assist in their children's learning.
- Community resources are available to strengthen school programs, family practices, and student learning.
- The two required parent-teacher conferences per year, beginning July 1, 2021 and each school year thereafter, can be fulfilled by ARSD offering parents the option of attending any parent-teacher conference by the use of telephonic, video, or other conferencing platforms.
- An additional parent-teacher conference, in addition to the two required conferences, shall be conducted during periods when ARSD provides remote learning for more than three consecutive weeks and one additional parent-teacher conference every six months thereafter for the duration of such period of remote learning.
  - ARSD will request from the parent/guardian of each student the name and contact information of an emergency contact person who may be contacted, if the student's parent/guardian cannot be reached to schedule a parent-teacher conference required when ARSD is providing remote learning for a period of three consecutive weeks or more.
  - o In situations in which the teacher is unable to contact a student's parent/guardian after three attempts to schedule the required parent-teacher conference during a period of remote learning provided by ARSD for three consecutive weeks or more, such teacher is directed to report such inability to the principal, school

## **Community Relations**

# **Communications with the Public**

counselor, or other school administrator designated by the Board. Such principal, counselor, or administrator is to contact the student's emergency contact to determine the student and family's health and safety.

By December 1, 2021 the Board shall utilize the document developed by the State Department of Education that provides information concerning educational, safety, mental health, and food insecurity resources and programs available to students and their families.

#### **Food Service**

# **Charging Policy**

The goal of the food service program is to provide students with nutritious and healthy foods, through the Amity Regional School District No. 5 (ARSD) food services program, that will enhance learning. The school nutrition program is an essential part of the education system; and by providing good tasting and nutritious meals in pleasant surroundings we are helping to teach students the value of good nutrition.

The Board of Education (Board) has an agreement with the Connecticut State Department of Education to participate in one or more school Child Nutrition Programs and accepts full responsibility for adhering to the federal and state guidelines and regulations pertaining to these school Child Nutrition Programs. The Board also accepts full responsibility for providing free or reduced price meals to eligible secondary students enrolled in the ARSD schools. Applicants for such meals are responsible to pay for meals until the application for the free or reduced price meals is completed and approved. All applications for free and reduced price lunch and any related information will be considered strictly confidential and not to be shared outside of the ARSD's finance department and food services program unless as allowed by law. Meals are planned to meet the specified nutrient standards outlined by the United States Department of Agriculture for children based on their age or grade group.

Although not required by law, because of the ARSD's participation in the Child Nutrition Programs the Board approves the establishment of a system to allow a student to charge a meal. The Board realizes that funds from the non-profit school food service account, according to federal regulations, cannot be used to cover the cost of charged meals that have not been paid. Moreover, federal funds are intended to subsidize the meals of children and may not be used to subsidize meals for adults (teachers, staff and visitors). Adults are not allowed to charge meals and shall pay for such meals at the time of service or through pre-paid accounts.

The Board prohibits the public identification or shaming of a child/student for any unpaid charges including, but not limited to, the following:

- Delaying or refusing to serve a meal to such student
- Designating a specific meal option for such student or otherwise taking any disciplinary action against such student

A student needing to charge a meal will be informed of his/her right to purchase a meal, which may exclude a la carte items, for any school breakfast, lunch, or other feeding.

In order to sustain ARSD's food services program, ARSD cannot permit the excessive charging of student meals. Therefore, any charging of meals must be consistent with this policy and any accompanying regulations. The Superintendent or his/her designee shall

Policy approved:

#### **Food Service**

develop regulations designed to effectively and respectfully address family responsibility for unpaid meals.

Any parent/guardian who anticipates a problem with paying for meals is encouraged to contact the Food Services Director and/or the applicable school Principal for assistance. The Board encourages all families who may have a child eligible for free or reduced price lunch to apply.

#### **Definitions**

"Delinquent Debt" are unpaid meal charges, like any other money owed to the non-profit school food service account when payment is overdue, as defined by state or local policies.

"Bad Debt" is when unpaid meal charges are not collected and are considered a loss. Such debt must be written off as an operating loss, which cannot be absorbed by the non-profit school food service account but must be restored using non-federal funds

#### **District-Wide**

- 1. ARSD uses MyPaymentsPlus, an automated prepayment system, which allows parents/guardians to view their child's meal account balance and purchases, receive low-balance notifications, and make deposits to their child's school meal account. Any student whose account has insufficient funds (i.e., is at the charging limit) and does not bring a meal from home may charge any combination of meals up to a negative balance an amount not to exceed the cost of thirty (30) meals. Negative balance status can be avoided by making a payment in the form of cash, check, or by credit card to the MyPaymentsPlus website
- 2. Student shall be allowed up to thirty (30) reimbursable meal charges. All other snacks or a la carte items shall not be charged. After thirty charges the parents/guardians of such child will be referred to ARSD's homeless education liaison.
- 3. Parents are responsible for providing meals or meal money for their student(s). Parents will be notified when charges are incurred. All credited meals must be repaid. Borrowing or charging is only in an emergency. Repayment is expected within 10 business days. Snack and a la carte purchases are cash only. If a student with a negative balance attempts to purchase a-la-carte items with cash, the money must first be applied to the negative balance.

Communications with parents/guardians regarding collection of a student's unpaid meal charges shall include information on local food pantries, application for free or reduced price meals and the Department of Social Services' supplemental nutrition assistance program, and a link to ARSD's website that lists any community services available to town residents.

The Board will accept gifts, donations, or grants from any public or private sources for the purpose

Policy approved:

#### **Food Service**

of paying off any unpaid charges for school meals.

#### **Delinquent Debt and Bad Debt**

ARSD's efforts to recover from households money owed due to the charging of meals must not have a negative impact on the children involved and shall focus primarily on the adults in the household responsible for providing funds for meal purchases. The school food authority is encouraged to consider whether the benefits of potential collections outweigh the costs which would be incurred to achieve those collections.

Money owed because of unpaid meal charges shall be considered "delinquent debt" as defined, as long as it is considered collectible and reasonable efforts are being made to collect it. Such debt must be paid by June 30, effective with the 2017-2018 school year.

After reasonable attempts are made to collect the delinquent debt and it is determined that further collection efforts are useless or too costly the debt must be reclassified as "bad debt." Such debt shall be written off as an operating loss not to be absorbed by the non-profit school food service account but must be restored using non-federal funds. The general operating budget is the funding source for the bad debts.

## **Dissemination of Policy**

This policy shall be provided in writing to all households at the start of each school year and to households transferring to ARSD during the school year.

This policy shall be included in student/parent handbooks, on online portals that households use to access student accounts, placed on the ARSD website, on the website of each school, and published at the beginning of each school year at the time information is distributed regarding free and reduced price meals and again to the household the first time the policy is applied to a specific child.

This policy shall be provided to all school staff and/or school food authority staff responsible for its enforcement. In addition, school social workers, nurses, the homeless liaison, and other staff members assisting children in need or who may be contacted by families with unpaid meal charges also should be informed of this policy.

ARSD's school food authority shall maintain, as required, documentation of the methods used to communicate this policy to households and school or school food authority-level staff responsible for policy enforcement.

#### **Food Service**

(cf. 3542-Food Service) (cf. 3542.31 - Free or Reduced Price Lunch Program)

Legal Reference: Connecticut General Statutes

10-215 Lunches, breakfasts and other feeding programs for public school children and employees. (as amended by PA 21-46).

10-215a Nonpublic school and nonprofit agency participation in feeding programs.

10-215b Duties of State Board of Education re feeding programs. State Board of Education Regulations State of Connecticut, Bureau of Health/Nutrition, Family Services and Adult Education Operational Memorandum No. 4-17, "Guidance on Unpaid Meal Charges and Collection of Delinquent Meal Payments," Nov. 2, 2016.

Operational Memorandum #19-10, State of Connecticut, Bureau of Health/Nutrition, Family Services and Adult Education "Unallowable Charges to No-profit School Food Service Accounts and the Serving of Meals to No-paying Full and Reduced Price Students." National School Lunch Program and School Breakfast Program; Competitive Foods. (7 CFR Parts 210 and 220), Federal Register, Vol 45 No. 20, Tuesday, January 29, 1980, pp 6758-6772 USDA Guidance:

SP 46-2016, "Unpaid Meal Charges: Local Meal Charge Policies" SP 47-2016, "Unpaid Meal Charges: Clarification on Collection of Delinquent Meal Payment"

SP 57-2016 "Unpaid Meal Charges: Guidance and Q and A" SP 58-2016 "2016 Edition: Overcoming the Unpaid Meal Challenge: Proven Strategies from Our Nation's Schools."

#### Personnel – Certified

#### **Staff Development**

"Staff Development" is viewed by the Board of Education (Board) as a continuous systematic effort to improve educational programs in the Amity Regional School District No. 5 (ARSD) through: (1) staff involvement in organized program planning, implementation, and evaluation efforts and (2) activities to upgrade the skills, knowledge, and ability of educators to improve student learning.

Each certified employee shall annually participate in a program of professional development, of not fewer than eighteen hours in length, of which a preponderance is in a small group or individual group settings. The professional development program shall:

- 1. be a comprehensive, sustained, and intensive approach to improving teacher and administrator effectiveness in increasing student knowledge achievement
- 2. focus on refining and improving various effective teaching methods that are shared between and among educators
- 3. foster collective responsibility for improved student performance
- 4. be comprised of professional learning that is aligned with rigorous state student academic achievement standards; conducted at the school among educators and facilitated by principals, coaches, mentors and distinguished educators or other appropriate teachers; occurs frequently on an individual basis or among groups of teachers in a job-embedded process of continuous improvement; and includes a repository of best practices for teaching methods developed by educators within each school that is continuously available to such educators for comment and updating
- 5. include training in culturally responsive pedagogy and practice

The principles and practices of social-emotional learning shall be integrated throughout the components of such program of professional development described in items 1 through 5 above.

Staff development experiences, made available by the Board directly or through a RESC with another Board of Education or through a provider approved by the Commissioner, shall be consistent with any goals identified by the certified employees and the Board.

The Board believes that staff development experience should be comprehensive, sustained, and intensive enough to improve teacher and administrator effectiveness in raising student performance and foster collective responsibility for improved student performance.

Teachers must constantly review curricular content, teaching methods and materials, educational philosophy and goals, social change, and other topics related to education to enhance the capabilities of educators to improve student learning. The Board recognizes that it shares with its certified staff responsibility for the upgrading and updating of teacher performance. The Board supports the principle of continuing training of teachers and the improvement of instruction.

## Personnel - Certified

## **Staff Development**

The Board, in order to determine its professional development program seeking the advice and assistance of teachers, shall establish a professional development and evaluation committee consisting of certified employees including representatives of the exclusive bargaining representative for such employees. Committee membership shall consist of at least one representative from each of the teachers' and administrators' unions and other school personnel the Board deems appropriate. The duties of the committee shall include, but not be limited to, participation in the development of a teacher evaluation and support program for ARSD and the development, evaluation, and annual updating of a comprehensive local professional development plan in fulfillment of the statutes for certified employees of ARSD. Such plan shall: (1) be directly related to the educational goals proposed by the Board pursuant to C.G.S. 10-220(b), (2) be developed in full consideration of the priorities and needs related to student social-emotional learning pursuant to C.G.S. 10-148a as amended and student outcomes as determined by the State Board of Education, and (3) provide for the ongoing and systematic assessment and improvement of both teacher evaluation and professional development of the Board's professional staff members including personnel management and evaluation training or experiences for administrators, shall be related to regular and special student needs, and may include provisions concerning career incentives and parent involvement.

Special effort shall be made to prepare teachers and other school personnel to meet the needs of students of diverse cultural and ethnic backgrounds. Planning and implementation of such programs shall be done cooperatively by administration, teachers, and parent advisory groups. Special effort shall also be given to administrators and/or supervisors in training pursuant to their obligations in the evaluation of the teacher.

Staff development activities should respond directly to the educational needs of the student body. The in-service program shall fulfill all applicable statutory requirements, especially those delineated in CGS 10-220a as amended.

The Board will allow any paraprofessional or non-certified employee of ARSD to participate on a voluntary basis in any in-service training program provided to certified staff on those topics mandated per C.G.S. <u>10</u>-220a, subsection (a).

(cf. 4115 – Evaluation and Support Program)

Legal Reference: Connecticut General Statutes

10-27 Exchange of professional personnel and students.

<u>10</u>-220a In-service training. (amended by PA 04-227, PA 08-160, June 19 Special Session, Public Act No. 09-1, PA 10-91, PA 12-116, PA 13-145, PA 15-215, PA 17-37 and PA 19-100 and PA 21-46)

## Personnel – Certified

## **Staff Development**

10-153b Selection of teachers' representatives

10-226f Coordinator of intergroup relations.

10-226g Intergroup relations training for teachers.

<u>10</u>-145b Teaching certificates (as amended by PA 01-173)

 $\underline{10}$ -148a Professional development (as amended by PA 17-37 and PA 19-100 and PA 21-46)

10-151(b) Employment of teachers. Definitions. Tenure

PA 17-32 An Act Concerning Human Trafficking

PA 17-37 An Act Implementing the Recommendations of the Task Force on Professional Development and In-service Training Requirements for Educators

## Personnel – Certified

## **Staff Development**

## P4131 Appendix

## Connecticut General Statutes 10-220a - In-service Training

## A. Required In-service Topics for Certified Personnel

- 1. Nature and the relationships of drugs and alcohol to health and personality development and procedures for discouraging their abuse.
- 2. Health and mental health risk reduction education including, but not limited to, the prevention of risk-taking behavior by children and the relationship of such behavior to substance abuse, pregnancy, sexually transmitted diseases including HIV-infection and AIDS, violence, teen dating, domestic violence, and child abuse.
- 3. School violence prevention and conflict resolution and the prevention of and response to youth suicide and the identification and prevention of bullying and response to bullying, as defined in 10-222d subsection (a) as amended. (Boards that implement an evidence-based model approach approved by the SDE are not required to provide in-service training on the identification and prevention of and response to prevention of bullying.)
- 4. Cardiopulmonary resuscitation and other emergency life-saving procedures.
- 5. Requirements and obligations of a mandated reporter regarding reporting of child abuse and neglect.
- 6. Training in the detection and recognition of and evidence-based structured literacy interventions for students with dyslexia.
- 7. Training in the awareness of human trafficking issues.
- 8. Culturally responsive pedagogy and practice.
- 9. African American and black studies (required commencing July 1, 2021)
- 10. Puerto Rican and Latino studies (required commencing July 1, 2021)

The principles and practices of social-emotional learning shall be integrated throughout all components of the professional development program, as appropriate.

## **B.** Optional In-Service Topics for Certified Personnel

The State Department of Education, within available appropriates and utilizing available materials, shall make the following subject matter available to boards of education:

- Holocaust and genocide education and awareness
- Native American History

## Personnel – Certified

## **Staff Development**

- Personal Financial Management
- The historical events surrounding the Great Famine in Ireland
- Domestic violence and teen dating violence
- Mental health first aid training
- Trauma-informed practices for the school setting to enable teachers, administrators, and pupil personnel to more adequately respond to students with mental, emotional, or behavioral health needs
- Second language acquisition including, but not limited to, language development and cultural responsive pedagogy
- Topics approved by the State Board of Education upon the request of local or regional boards of education as part of in-service training programs pursuant to CGS <u>10</u>-220a, section 3.

The Board may include any of the items listed above (Section B) in its in-service training program, pursuant to CGS <u>10</u>-220a.

## Personnel - Certified/Non-Certified

## **Travel Reimbursement**

The Board of Education (Board) will reimburse employees of Amity Regional School District No. 5 (ARSD) who incur expenses in carrying out their authorized duties. Authorization for reimbursements must be obtained in writing from the employee's supervisor prior to incurring such expenses. Immediately upon returning from a business trip the individual will prepare and submit for approval by the Supervisor and Business Office a travel expense voucher. Receipts must be submitted for all individual expenditures. Travel expenses will be paid for the employee only.

Reimbursement for mileage shall be at the rate established by the Internal Revenue Service. Other incurred travel expenses shall not exceed the rates established by the Internal Revenue Service.

A traveler on official school business is expected to exercise the same care in incurring expenses that a prudent person would exercise in traveling on personal business.

## Age of Attendance

All children whose parents or legal guardians reside in the towns of Bethany, Orange, or Woodbridge are entitled to a free public education in the middle schools or high school of Amity Regional School District No. 5 (ARSD). Students are legally entitled to attend until they graduate from high school or reach the age of twenty-one, whichever comes sooner. For purposes of establishing the residency of a child of a member of the armed forces, as defined in C.G.S. <u>27</u>-103, and who is seeking enrollment in ARSD, in which such child is not yet a resident, the Board shall accept the military orders directing such member to Connecticut or any other documents from the armed forces indicating the transfer of such member to Connecticut as proof of residency in ARSD.

Parents and those who have the care of children five years of age and older and under eighteen years of age are obligated by Connecticut law to cause any such child to attend public day school or its equivalent, except as otherwise provided by law.

A child who has attained the age of seventeen and who has terminated enrollment with parental consent in ARSD's schools and subsequently seeks readmission may be denied readmission for up to ninety school days from the date of such termination.

A child who has attained the age of nineteen or older may be placed in an alternative school program or other suitable educational program if he/she cannot acquire a sufficient number of credits for graduation by age twenty-one.

The above requirements are not to serve as barriers to immediate enrollment of students designated as homeless or foster children as required by the Every Student succeeds Act (ESSA) and the McKinney-Vento Act as amended by ESSA.

Legal Reference: Connecticut General Statutes

4-176e to 4-180a Agency hearings

4-181a Contested cases, Reconsideration, Modifications 10-15 Towns to

maintain schools

10-15c Discrimination in public schools prohibited; School Attendance by

five-year olds

10-76a-10-76g Re: special education

10-184 Duties of parents (re mandatory schooling for children ages five to

sixteen, inclusive) as amended by PA 98-243, PA 00-157, PA 09-6

(September Special Session), and PA 18-15...

10-186 Duties of towns and regional school districts re school attendance;

Hearings (as amended by PA 19-179 and PA 21-86)

P.A. 21-86 An Act Concerning the Enrollment of Children of Members of the Armed Forces in Public Schools and the Establishment of a Purple Star

# **Age of Attendance**

School Program

PA 19-179 An Act Concerning Homeless Students' Access to Education Appeals to state board. Establishment of hearing board McKinney-Vento Homeless Assistance Act (PL 107-110 Sec. 1032) 42 U.S.C. §11431-11435, as amended by the ESSA, P.L. 114-95 Federal Register: McKinney-Vento Education for Homeless Children &

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

10-233a-10-233f Inclusive re: suspend, expel, removal of pupils 10-233c Suspension of students

10-233d Expulsion of students

State Board of Education Regulations

10-76a-i General Definitions (c) (d) (g) (t)

McKinney Vento Homeless Assistance Act (PL 107-110 sec. 1032) 42

U.S.C. § 11431-11435, as amended by the ESSSA, PL 114-95

Federal Register: McKinney Vento Education for Homeless Children &

Youths Program, Vol. 81 No. 52, 3/17/2016

#### Attendance

The State Board of Education definitions establish two levels of criteria for an absence to be considered an excused absence (see table below).

Level	Total # of Days Absent*	Acceptable Reasons for a Student Absence to be Considered Excused	Documentation Required Within Ten days
1	One through nine	Any reason that the student's parent or guardian approves.	Parent or Guardian note only.
2	Ten and above	Student illness (Note: to be deemed excused, an appropriately licensed medical professional must verify all student illness absences, regardless of the absence's length.)  Student's observance of a religious holiday  Student mental health day (2)  Death in the student's family or other emergency beyond the control of the student's family  Mandated court appearances (additional documentation required)  The lack of transportation that is normally provided by a district other than the one the student attends (parental documentation is not required for this reason)	·

<sup>\*</sup>Note: The total number of days absent includes both excused and unexcused absences.

It is important to note that while the first nine absences in a school year can be deemed excused for any reason the parent or guardian provides, the tenth and each subsequent absence establish a more stringent and specific set of reasons for the absence to qualify as excused. The flow chart (attachment C) offers a visual tool to help determine if an absence is excused or unexcused.

Included in the excused absences are two (2) student mental health days taken during the school year. Such absence is to permit the student to attend to his/her emotional and psychological well being in lieu of attending school. For purposes of school year limitation such absence shall be identified as a "mental health wellness day." A student cannot take these mental health days during consecutive school days.

#### Attendance

A student's engagement in remote classes, remote meetings, activities on time-logged electronic systems, and completion and submission of assignments if such engagement accounts for not less than one-half of the school day during remote learning is excluded from the definitions of "excused absence" and "unexcused absence."

In cases where a student's extended absence crosses levels the rules should be applied as if there were two separate absences: one under Level 1 and the other under Level 2. For example, if a student is absent for five days on a family vacation and those absences represent numbers seven through eleven, absences seven, eight, and nine would fall under Level 1 rules and can be accepted as excused; absences ten and eleven would fall under Level 2 rules and would not be considered excused.

ARSD communicates the different levels of criteria to parents and provides absence information, so parents can track their child's excused and unexcused absences. ARSD informs parents when their child has reached his or her sixth and ninth absences and reminds them of the stricter rules that apply to absence number ten and above.

#### **Documentation**

Parent or guardian notes and other documentation are central to determining whether a student's absence is excused or unexcused. While a note from a parent or guardian will likely be the most common form of documentation, other methods of reporting a student's absence are acceptable. For example, a parent or guardian can report the student's absence in person to an authorized school official, such as an attendance clerk. The table below details the different types of acceptable absence documentation and the required elements for each type:

Parent or Guardian Note	In-Person Explanation from	School Nurse Evaluation
	Parent or Guardian	(either in person or telephone
	to an Authorized School Staff	consultation)
	Member	
Date of absence	Dates of absence	Dates of absence
Reason for absence	Reason for absence parent or	Reason for absence
	guardian reports	
Signature of parent or	Name of parent or guardian	Date and location of the
guardian	reporting the absence	consultation
	Date and location of the report by	Type of consultation (i.e., did
	the parent or guardian	they see the student
		themselves or speak to parent
		about the student?)
	Signature of staff member receiving	Signature of school nurse
	report	

#### Attendance

School staff receive or generate documentation for each incidence of absence. An incidence of absence is a set of consecutive school days absent. If a student is out three consecutive days, that is one incidence of absence; therefore, only one note is needed. If the student is out three days but attended school one day between days two and three, the student has two incidences of absence and needs two notes. ARSD accepts notes covering a series of absences only if the absences share a common cause.

Certain types of absences in Level 2 require additional documentation or verification. Absences due to student illnesses and mandated court appearances require this additional information, once the student has accrued more than nine absences (entered Level 2). For students in Level 1 these additional requirements do not apply. For absences due to student illness, Level 2 students must either provide a signed note from a medical professional who has evaluated the student confirming the absence and giving an expected return date or have his or her school nurse verify the student's absence with the medical professional treating the student. The medical professional who is treating the student can be the school nurse at the student's school.

Mandated court appearances also require additional documentation. Students missing school to make mandated court appearances much provide documentation such as:

- a police summons
- a notice to appear
- a subpoena
- a signed note from a court official

#### **Accommodations for Parents**

With Connecticut's diverse student population most, if not all, schools will likely encounter a student whose parent or guardian is not proficient in writing in English. These parents may or may not be proficient in writing in another language. Schools should make efforts to help these parents report their child's absences. For parents who are proficient in a language other than English ARSD accepts absence notes in the parents' proficient language. For parents who are not proficient in writing in any language ARSD verbally informs them of the attendance requirements and that they may report a student's absence in person at the school.

## **Families without Health Insurance**

Families who lack health insurance and/or those with limited means may find it challenging to meet the Level 2 requirement to obtain a note from a licensed medical professional for absences due to illness. In these cases school nurses can evaluate the ill student either in person or over the telephone and, where appropriate, provide the required documentation for the excused absence.

#### Attendance

School nurses can further assist schools and families by:

- assisting parents with accessing publicly supported health insurance for those children who are uninsured
- gaining permission from parents to communicate with health care providers regarding students' health status
- providing schools with a perspective that validates why students with confirmed diagnoses may be frequently absent from school due to illnesses or for therapies essential to maintaining their health

## **Exceptions to the Documentation Requirement**

Two types of absences do not require documentation:

- 1. Absences that result from a student not receiving transportation from one school district to attend school in another district must be deemed as an excused absence. For example:
  - a. One district provides transportation for students of its town or region to attend schools run by another district and the district providing the transportation shuts down due to inclement weather or other emergency, but the district that the student attends stays open.
  - b. In this situation the student would be absent but would not need a parental note to that effect; such absence would be deemed excused.
- 2. Absences that are the result of disciplinary actions taken by ARSD. These disciplinary absences are neither excused nor unexcused.

## **Emergencies**

One of the acceptable reasons for a Level 2 student to be absent is a death in the family or other emergency beyond the control of the family. For the purposes of the definition of excused absences emergencies are generally significant events that are outside of the control of the student's family. They are normally short absences consisting of a few days at most. Examples of emergencies include:

- family member who is very ill and close to dying
- student's home is lost to fire or eviction
- family's home is being quarantined
- natural disaster
- a student who is a parent and whose child needs to be in the hospital
- a family member's military deployment or return from deployment

#### Attendance

Some unexpected absences will not qualify as an emergency. These include:

- staying home to meet the plumber or other tradesman
- routine childcare of a younger child by the student
- opportunity to work an extra shift at after-school job

Extended absences would be considered an emergency only under extreme circumstances. For example, if an order of the community health department quarantined a family's home for an extended period, such quarantine would be an extended emergency.

Absences due to family emergencies do not require additional documentation. A parental note explaining the emergency received within ten school days is sufficient; but it is essential that the note explain the emergency, so school staff can evaluate if the situation was indeed an emergency.

# **Extraordinary Educational Opportunities**

From time to time students encounter an exceptional opportunity for an experience of an educational nature. While these events may not be part of their school work they provide an excellent chance to further their education. Under certain circumstances the days devoted to these opportunities can count as excused absences for Level 2 students.

To qualify as an extraordinary educational opportunity it must meet the following criteria:

- a) The opportunity must be educational in nature. It must have a learning objective related to the student's course work or plan of study. Not all memorable and/or life experiences would be considered educational and, therefore, would not be available for this exemption.
- b) It must be an opportunity not ordinarily available to the students.
- c) It must be grade and developmentally appropriate.
- d) The content of the experience must be highly relevant to the student. While some opportunities will be relevant to all students others will contain very specific content that would limit their relevance to a smaller group of students. For example, a trumpet lesson from jazz great, Wynton Marsalis, would be very relevant to students who play trumpet but not to others who do not play trumpet.

Note: Criteria c) and d) above may mean that an exceptional educational opportunity exemption may be approved for one family member but not another attending the same event/opportunity.

#### Attendance

Some examples of extraordinary educational opportunities include:

- the opportunity to meet the President of the United States or a foreign head or state
- a behind-the-scenes tour of the Kennedy Space Center.

Some examples of activities that do not qualify as extraordinary educational opportunities include:

- family vacations
- going to a concert of a favorite pop star

# **Best Practices for Extraordinary Educational Opportunities**

It is important that the school, the student, and the student's family all have a common understanding of the opportunity that is being requested and approved.

- a) Requests: All requests for approval of exceptional educational opportunities should be submitted in writing; bear the signature of the student and his/her parent/guardian; outline the learning objective of the opportunity and detail how the objective is linked to the students' coursework or plan of study; include additional documentation (where available); and be submitted prior to the opportunity.
- b) Approvals: All approvals for opportunities should:
  - be in written form
  - detail any requirements placed upon the student as a condition of approval
  - include the specific days approved for the opportunities\*
  - include in the approval the caveat that the administration may withdraw its approval if the opportunity is canceled or the student fails to meet the mutually agreed on requirements of the approval
    - \*For approved opportunities that occur during longer absences (e.g., during a vacation), limit the number of days that are considered excused to reasonable travel time to and from the opportunity and the days of the opportunity.
- c) Requirement to share: ARSD expects students to share their experience with other students and/or staff when they return. This will benefit the larger school community.
- d) <u>Approval not assured</u>: ARSD informs parents that approvals are awarded on a case-by-case basis, are based on a number of factors, and that opportunities approved for one student may not be approved for another.

Legal Reference: Connecticut General Statutes

10-184 Duties of parents (as amended by PA 98-243, PA 00-157 and PA

18-15)

<u>10</u>-185 Penalty

#### Attendance

<u>10</u>-198a Policies and procedures concerning truants (as amended by P.A.11-136, An Act Concerning Minor Revisions to the Education Statutes and PA 14-198, An Act Concerning Excused Absences from School for Children of Service Members, and PA 16-147, An Act Concerning the Recommendations of the Juvenile Justice Policy and Oversight Committee)

<u>10</u>-198b State Board of Education to define "excused absence," "unexcused absence," and "disciplinary absence" (as amended by PA 21-46 Section 19)

<u>10</u>-198d Chronic absenteeism (as amended by PA 17-14 and PA 18-182) <u>45a</u>-8c Truancy clinic. Administration. Policies and procedures. Report. (as amended by PA 15-25)

<u>10</u>-199 through 10-202 Attendance, truancy - in general Action taken by State Board of Education on January 2, 2008, to define "attendance."

Action taken by State Board of Education on June 27, 2012, to define "excused" and "unexcused" absences.

PA 17-14 An Act Implementing the Recommendations of the Department of Education

PA 21-46 An Act Concerning Social Equity and the Health, Safety and Education of Children

## **Bullying and Teen Dating Violence**

#### Safe School Climate Plan

## **Purpose/Priority Statement**

The Amity Regional School District (ARSD) will not tolerate any unlawful or disruptive behavior including any form of bullying, cyberbullying, teen dating violence, or retaliation in our schools or in school-related activities. In addition, ARSD will promptly investigate all reports and complaints of bullying, cyberbullying, teen dating violence, and retaliation and take appropriate, effective action to end that behavior. Most importantly, ARSD will support this commitment in all aspects of its activities including in its curricula, instructional programs, staff development, extracurricular activities, and parent/guardian involvement. The Board of Education (Board) fully understands that it is only through a comprehensive approach with a focus on the development of a positive school climate and the support of students, staff, families, law enforcement agencies, and the community that issues of violence will be prevented and a safe school climate achieved. Lastly, in consultation with these constituencies, the Board has established this District Safe School Climate Plan for preventing, intervening, and responding to incidents of bullying, cyberbullying, teen dating violence, and retaliation.

The Board promotes a safe and secure school climate conducive to teaching and learning that is free from threat, harassment, and any type of bullying behavior or teen dating violence. Therefore, it shall be the policy of the Board that bullying of a student by another student or teen dating violence are prohibited.

# I. Prohibition Against Bullying

The Board prohibits bullying: (a) on school grounds; at a school-sponsored or school-related activity, function, or program whether on or off school grounds; at a school bus stop; on a school bus or other vehicle owned, leased, or used by the Board; or through the use of an electronic device or an electronic mobile device owned, leased, or used by the Board; and (b) outside of the school setting if such bullying: (i) creates a hostile environment at school for the victim, (ii) infringes on the rights of the victim at school, or (iii) substantially disrupts the education process or orderly operation of a school.

# II. Definitions

**"Bullying"** means the repeated use by one or more students of a written, oral, or electronic communication, such as cyberbullying, or a physical act or gesture by one or more students repeatedly directed at or referring to another student attending school in the same school district that:

# **Bullying and Teen Dating Violence**

- 1. causes physical or emotional harm to such student or damage to such student's property
- 2. places such student in reasonable fear of harm to himself or herself or of damage to his or her property
- 3. creates a hostile environment at school for such student
- 4. infringes on the rights of such student at school or
- 5. substantially disrupts the education process or the orderly operation of a school

Bullying shall include, but not be limited to, a written, oral, or electronic communication or physical act or gesture based on any actual or perceived differentiating characteristic such as race; color; religion; ancestry; national origin; gender; sexual orientation; gender identity or expression; socioeconomic status; academic status; physical appearance; or mental, physical, developmental or sensory disability or by association with an individual or group who has or is perceived to have one or more of such characteristics.

(The student against whom the activity is directed must be attending school in the same district as the students engaged in the activity.)

"Cyberbullying" means any act of bullying through the use of the internet, interactive and digital technologies, cellular mobile telephone or other mobile electronic devices, or any electronic communications.

"Teen dating violence" means any act of physical, emotional, or sexual abuse including stalking, harassing, and threatening that occurs between two students who are currently in or who have recently been in a dating relationship.

"Mobile electronic device" means any hand-held or other portable electronic equipment capable of providing data communication between two or more individuals including, but not limited to, a text messaging device, a paging device, a personal digital assistant, a laptop computer, equipment that is capable of playing a video game or a digital video disk, or equipment on which digital images are taken or transmitted.

"Electronic communication" means any transfer of signs, signals, writing, images, sounds, data, or intelligence of any nature transmitted in whole or in part by a wire, radio, electromagnetic, photoelectronic, or photo-optical system.

"Hostile environment" means a situation in which bullying among students is sufficiently severe or pervasive to alter the conditions of the school climate.

"Outside of the school setting" means at a location, activity, or program that is not school-

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related or through the use of an electronic device or a mobile electronic device that is not owned, leased, or used by a local or regional board of education.

"School employee" means: (a) a teacher, substitute teacher, school administrator, school superintendent, guidance counselor, psychologist, social worker, nurse, physician, school paraprofessional, or coach employed by a local or regional Board of Education or working in a public elementary, middle, or high school; or (b) any other individual who, in the performance of his or her duties, has regular contact with students and who provides services to or on behalf of students enrolled in a public elementary, middle, or high school pursuant to a contract with the local or regional Board of Education.

"School climate" means the quality and character of school life with a particular focus on the quality of the relationships within the school community between and among students and adults. (It is based on people's experiences of school and reflects norms, goals, values, interpersonal relationships, teaching and learning practices, and organizational structures.)

# III. Reporting and Responding to Bullying and Teen Dating Violence and Retaliation (Complaint Process)

# A. Publication of the Prohibition against Bullying and Teen Dating Violence and Related Procedures

The prohibition against bullying and teen dating violence shall be publicized by including the following statement in the student handbook of each of the district schools:

Bullying behavior and teen dating violence by any student in the Amity Regional School District is strictly prohibited, and such conduct may result in disciplinary action including suspension and/or expulsion from school. "Bullying" means the repeated use by one or more students of a written, oral, or electronic communication such as cyberbullying directed at or referring to another student attending school in the same school district or a physical act or gesture by one or more students repeatedly directed at another student attending school in the same district that:

- 1. causes physical or emotional harm to such student or damage to such student's property
- 2. places such student in reasonable fear of harm to himself or herself or of damage to his or her property
- 3. creates a hostile environment at school for such student

## **Bullying and Teen Dating Violence**

- 4. infringes on the rights of such student at school or
- 5. substantially disrupts the education process or the orderly operation of a school

Bullying shall include, but not be limited to, a written, verbal, or electronic communication or physical act or gesture based on any actual or perceived differentiating characteristic, such as race; color; religion; ancestry; national origin; gender; sexual orientation; gender identity or expression; socioeconomic status; academic status; physical appearance; gender identity; or physical mental, developmental or sensory disability; or by association with an individual or group who has or is perceived to have one or more of such characteristics.

Students who engage in any act of bullying on school grounds; at a school-sponsored or school-related activity; function, or program whether on or off school grounds; at a school bus stop; on a school bus or other vehicle owned, leased or used by the Board; or through the use of an electronic device or an electronic mobile device owned, leased, or used by the Board and outside of the school setting if such bullying:

- 1. creates a hostile environment at school for the victim
- 2. infringes on the rights of the victim at school or
- 3. substantially disrupts the education process or the orderly operation of a school

"Teen dating violence" means any act of physical, emotional, or sexual abuse including stalking, harassing, and threatening that occurs between two students who are currently in or who have recently been in a dating relationship.

Students and/or parents may file verbal or written complaints concerning suspected bullying behavior or teen dating violence, and students shall be permitted to anonymously report acts of bullying or teen dating violence to school employees. Any report of suspected bullying behavior or teen dating violence will be promptly reviewed. If acts of bullying or teen dating violence are verified, prompt disciplinary action may be taken against the perpetrator consistent with his/her rights of due process. Board policy and regulation (Plan) #5131.911 set forth this prohibition and the related procedures in detail and are available to students and their parents/guardians on the ARSD and individual school websites or by request.

## **B.** Appropriate School Personnel

All school employees are charged with the responsibility of taking reports of bullying and teen dating violence or if witnessing acts of bullying or teen dating violence to notify the Safe School Climate Specialist or another administrator when the Safe School Climate Specialist is not available. Reports shall be appropriately investigated by the Safe School Climate Specialist or

# **Bullying and Teen Dating Violence**

another administrator when the Safe School Climate Specialist is not available.

#### **District Safe School Climate Coordinator**

For the school year commencing July 1, 2012 and each school year thereafter the Superintendent of Schools shall appoint from among existing District staff a District Safe School Climate Coordinator. The Coordinator shall:

- 1. Implement ARSD's safe school climate plan
- Collaborate with safe school climate specialists, the Board, and the Superintendent to prevent, identify, and respond to bullying and teen dating violence in ARSD schools
- 3. Provide data and information derived from the safe school climate assessments in collaboration with the Superintendent to the Department of Education
- 4. Meet with the safe school climate specialists at least twice during the school year to discuss bullying and teen dating violence issues in ARSD and make recommended changes to ARSD's safe school climate plan

# **Safe School Climate Specialist**

For the school year commencing July 1, 2012 and each school year thereafter each school Principal shall serve or designate someone to serve as the Safe School Climate Specialist for the school. The Specialist in each school shall:

- 1. Investigate or supervise the investigation of reported acts of bullying and teen dating violence in the school in accordance with ARSD's Safe School Climate Plan
- 2. Collect and maintain records of reports and investigations of bullying and teen dating violence in the school
- 3. Act as the primary school official responsible for preventing, identifying, and responding to bullying and dating violence reports in the school

## C. Annual Notification of the Complaint Process

The process by which students may make formal, informal, and anonymous complaints as set forth below shall be publicized annually in the student handbook of each of ARSD schools. In addition, this Safe School Climate Plan shall be placed on the ARSD website and the website of each school.

## **Bullying and Teen Dating Violence**

## **D. Formal Written Complaints**

Students and/or their parents or guardians may file written reports of conduct that they consider to be bullying or teen dating violence. Such written reports shall be reasonably specific as to the actions giving rise to the suspicion of bullying or teen dating violence including time and place of the conduct alleged, the number of such incidents, the target of such suspected bullying, or teen dating violence and the names of any potential student or staff witnesses. Such reports may be filed with any school employee; and they shall be promptly forwarded to the Safe School Climate Specialist or another school administrator, if the Safe School specialist is unavailable, for review and action in accordance with Section IV below.

## E. Informal/Verbal Complaints by Students

Students may make an informal complaint of conduct that they consider to be bullying by verbal report to the Safe School Climate Specialist or to any school employee as defined or administrator. Such informal complaints shall be reasonably specific as to the actions giving rise to the suspicion of bullying including time and place of the conduct alleged, the number of such incidents, the target of such suspected bullying, and the names of any potential student or staff witnesses. A school employee or administrator or the Safe School Climate Specialist who receives an informal complaint shall promptly reduce the complaint to writing including the information provided. Such written report by the school employee, administrator, if not the Safe School Climate Specialist, shall be promptly forwarded to the Building Principal for review and action in accordance with Section IV below.

## F. Anonymous Complaints

Students who make informal complaints as set forth above may request that their name be maintained in confidence by the school employee who receives the complaint. Should anonymity be requested, the Safe School Climate Specialist, if not the Principal or his/her designee, shall meet with the student to review the request for anonymity and the impact that maintaining anonymity of the complaint may have on the investigation of the complaint and/or possible remedial action. At such meeting the student shall be given the choice as to whether to maintain the anonymity of the complaint. Anonymous complaints shall be reviewed, and reasonable action will be taken to address the situation to the extent such action may be taken that: (1) does not disclose the source of the complaint and (2) is consistent with the due process rights of the student(s) alleged to have committed acts of bullying. No disciplinary action shall be taken solely on the basis of an anonymous report.

# **Bullying and Teen Dating Violence**

# IV. Staff Responsibilities and Intervention Strategies

## A. Teachers and Other School Staff

School employees who witness acts of bullying or teen dating violence as defined above or who receive reports of bullying or teen dating violence shall promptly notify the Safe School Climate Specialist or another school administrator, if the Safe School Climate Specialist is unavailable, not later than one school day after such employee witnesses or receives a report of bullying or teen dating violence. A written report must be filed not later than two school days after making such an oral report concerning the events witnessed or reported.

School employees who receive student or parent reports of suspected bullying or teen dating violence shall promptly notify the Safe School Climate Specialist of such report(s). If the report is a formal written complaint, such complaint shall be forwarded promptly (no later than the next school day) to the Safe School Climate Specialist or another school administrator, if the Safe School Climate Specialist is unavailable.

If the report is an informal complaint by a student that is received by a school employee, he or she shall prepare a succinct written report of the informal complaint, which shall be forwarded promptly (no later than the next school day) to the Safe School Climate Specialist or another school administrator, if the Safe School Climate Specialist is unavailable. If the report is an informal complaint by a student that is received by a school employee, this employee shall verbally report the matter to the Safe School Climate Specialist not later than the next school day.

In addition to addressing both informal and formal complaints, school employees and other professional employees are encouraged to address the issue of bullying and teen dating violence in other interactions with students. Teachers and other professional employees may find opportunities to educate students about bullying and teen dating violence and help eliminate bullying behavior and teen dating violence through class discussions, counseling, and reinforcement of socially appropriate behavior. All school employees including teachers and other professional employees should intervene promptly whenever they observe student conduct that has the purpose or effect of ridiculing, humiliating, or intimidating another student, even if such conduct does not meet the formal definition of "bullying" or teen dating violence.

# **Bullying and Teen Dating Violence**

# B. Responsibilities of the Safe School Climate Specialist

# 1. Investigation

The Safe School Climate Specialist shall be promptly notified of any formal or informal complaint of suspected bullying or teen dating violence received by any school employee. The Safe School Climate Specialist shall investigate or supervise the investigation of reported acts of bullying or teen dating violence in the school in accordance with ARSD's Safe School Climate Plan. All such complaints shall be investigated promptly. The investigation must be completed promptly after the receipt by the Safe School Climate Specialist of any written report. In order to allow ARSD to adequately investigate all formal complaints, the parent of the student suspected of being bullied or victimized by teen dating violence must complete a consent form that allows ARSD to release that student's name to those third parties who ARSD contacts as part of its investigation of that complaint with regard to the investigation of informal complaints. The parent of the student suspected of being bullied or victimized by teen dating violence must complete the above referenced consent form, so long as that student has not requested anonymity. A written report of the investigation shall be prepared when the investigation is complete. Such report shall include findings of fact, a determination of whether acts of bullying or teen dating violence were verified, and when acts of bullying or teen dating violence are verified a recommendation for intervention including disciplinary action. Where appropriate written witness statements shall be attached to the report.

The school shall notify parents or guardians of all students involved in a verified act of bullying or teen dating violence not later than forty-eight (48) hours after the completion of the investigation. The notice shall be simultaneously mailed to the parent/guardian with whom the student primarily resides and in the case of a divorced/split situation to the other parent/guardian if requested.

The notice must describe the school's response, measures being taken by the school to ensure the safety of the students against whom such act was directed, and any consequences that may result from further acts of bullying or teen dating violence.

Notwithstanding the foregoing, when a student making an informal complaint has requested anonymity the investigation of such complaint shall be limited as is appropriate in view of the anonymity of the complainant. Such limitation of investigation may include restricting action to a simple review of the complaint (with or without discussing it with the alleged perpetrator) subject to receipt of further information and/or the withdrawal by the complaining student of the condition that his/her report be anonymous.

# **Bullying and Teen Dating Violence**

#### 2. Remedial Actions

Verified acts of bullying or teen dating violence shall result in intervention by the Building Principal or his/her designee that is intended to address the acts of the perpetrator and the needs of the victim and to assure that the prohibition against bullying behavior and teen dating violence is enforced with the goal that any such bullying behavior or teen dating violence will end as a result. Bullying behavior and teen dating violence can take many forms and can vary dramatically in how serious it is and what impact it has on the victim and other students. Accordingly, there is no one prescribed response to verified acts of bullying or teen dating violence. While conduct that rises to the level of "bullying" or "teen dating violence" as defined above will generally warrant disciplinary action against the perpetrator of such bullying or teen dating violence, whether and to what extent to impose disciplinary action (detention, in-school suspension; suspension or expulsion) is a matter for the professional discretion of the Building Principal (or responsible program administrator or his/her designee). The following sets forth possible interventions for building principals to enforce the Board's prohibition against bullying and teen dating violence. No disciplinary action may be taken solely on the basis of an anonymous complaint.

The following sets forth permissible interventions for building principals (or other responsible program administrators) to enforce the Board's prohibition against bullying and teen dating violence.

## a. Non-disciplinary Interventions

When verified acts of bullying or teen dating violence are identified early and/or when such verified acts of bullying or teen dating violence do not reasonably require a disciplinary response students may be counseled as to the definition of bullying and teen dating violence and their prohibition and students' duty to avoid any conduct that could be considered bullying or teen dating violence.

If a complaint arises out of conflict between students or groups of students, peer mediation may be considered. Special care, however, is warranted in referring such cases to peer mediation. A power imbalance may make the process intimidating for the victim and, therefore, inappropriate. In such cases the victim should be given additional support. Alternatively, peer mediation may be deemed inappropriate to address the concern.

In any instance in which bullying or teen dating violence are verified the building Principal (or

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other responsible program administrator) shall invite the parents/guardians of the student against whom such act was directed and the parents/guardians of a student who commits any verified act of bullying or teen dating violence to a meeting to communicate to such parents or guardians the measures being taken by the school to ensure the student's safety and to prevent further acts of bullying or teen dating violence.

In the discretion of the building Principal or other responsible program administrator the meeting(s) described in this section may be held jointly or separately. (The SDE recommends such meetings to be separate.)

## **b.** Disciplinary Interventions

When acts of bullying or teen dating violence are verified and a disciplinary response is warranted students are subject to the full range of disciplinary consequences. Anonymous complaints that are not otherwise verified, however, shall not be the basis for disciplinary action. In-school suspension and suspension may be imposed only after informing the accused perpetrator of the reasons for the proposed suspension and giving him/her an opportunity to explain the situation, in accordance with the Board's Student Discipline policy.

Expulsion may be imposed only after a hearing before the Board, a committee of the Board, or an impartial hearing officer designated by the Board in accordance with Board policy. This consequence shall be reserved for serious incidents of bullying or teen dating violence and/or when past interventions have not been successful in eliminating bullying behavior or teen dating violence.

# c. Interventions for Students Bullied or Victimized by Teen Dating Violence

The Safe School Climate Specialist/Building Principal (or other responsible program administrator) or his/her designee shall intervene in order to address repeated incidents of bullying or teen dating violence against a single individual. Intervention strategies for a bullied student or student victimized by teen dating violence may include the following:

- Counseling
- Increased supervision and monitoring of student to observe and intervene in bullying/teen dating violence situations
- Encouragement of student to seek help when victimized or witnessing victimization
- Peer mediation where appropriate

# **Bullying and Teen Dating Violence**

# 3. General Prevention and Intervention Strategies

In addition to the prompt investigation of complaints of bullying or teen dating violence and direct intervention when acts of bullying or teen dating violence are verified, other ARSD actions may ameliorate any potential problem with bullying or teen dating violence in school or at school-sponsored activities. A focus will be placed on ARSD and school efforts to improve school climate based upon the National School Climate Standards.

While no specific action is required and school needs for such interventions may vary from time to time, the following list of potential intervention strategies shall serve as a resource for administrators, teachers, and other professional staff members in each school:

- a. Implementation of a positive behavioral interventions and supports process or another evidence-based model approach for safe school climate or for the prevention of bullying and teen dating violence including any such program identified by the Department of Education
- b. A safe school climate assessment on or after July 1, 2012 and biennially thereafter to determine the prevalence of bullying and teen dating violence; such assessments may include, in addition to those approved and disseminated by the State Department of Education in collaboration with CAS, the National School climate Standards Self-Assessment Tool and the Connecticut State Department of Education's "Improving School Climate Team Rubric;
- c. Establishment by the school Principal of a Safe School Climate Committee in each ARSD school or the designation of an existing committee that is responsible for fostering a safe school climate and addressing issues related to bullying and teen dating violence in the school. Beginning July 1, 2021 and each school year thereafter such committee shall also include: (a) school personnel including, but not limited to, at least one teacher selected by the exclusive bargaining unit representative for certified employees, (b) medical and mental health personnel assigned to such school, and (c) at the high school level at least one student enrolled at the school. The student is to be selected by the students in a manner determined by the school Principal. The Safe School Climate Committee shall:
  - 1. Receive copies of completed reports following investigations of bullying and teen dating violence
  - 2. Identify and address patterns of bullying and teen dating violence among students in the school
  - 3. Review and amend school policies relating to bullying and teen dating violence
  - 4. Review and make recommendation to the ARSD Safe School Climate Coordinator

# **Bullying and Teen Dating Violence**

- regarding the ARSD's Safe Climate Plan based on issues and experiences specific to the school
- 5. Educate students, school employees, and parents/guardians of students on issues relating to bullying and teen dating violence
- 6. Collaborate with the ARSD Safe School Climate Coordinator in the collection of data regarding bullying and teen dating violence
- 7. Perform any other duties as determined by the School Principal that are related to the prevention, identification, and response to school bullying and school teen dating violence for the school. Parent and student members of the Safe School Climate Committee are excluded from activities #1 and #2 above and from any other committee activities that may compromise student confidentiality.
- d. Adequate adult supervision of outdoor areas, hallways, the lunchroom, and other specific areas where bullying and teen dating violence are likely to occur
- e. Inclusion of grade-appropriate bullying and teen dating violence education and prevention curricula in grades 7-12
- f. Individual interventions with the perpetrator, parents, and school employees and interventions with the bullied student or the student victimized by teen dating violence, parents, and school employee
- g. School-wide training related to safe school climate
- h. Promotion of parent involvement in bullying and teen dating violence prevention through individual or team participation in meetings, trainings, and individual interventions
- i. Respectful responses to bullying and teen dating violence concerns raised by students, parents, or staff
- j. Planned professional development programs addressing bully/victim and perpetrator of teen dating violence/victim problems
- k. Student peer training, education, and support; use of peers to help ameliorate the plight of victims and include them in group activities
- 1. Avoidance of sex-role stereotyping (e.g., males need to be strong and tough)
- m. Continuing awareness and involvement on the part of staff and parents with regards to prevention and intervention strategies
- n. Modeling by all school employees of positive, respectful, and supportive behavior toward students
- o. Creating a school atmosphere of team spirit and collaboration that promotes appropriate social behavior by students in support of others
- p. Employing classroom strategies that instruct students how to work together in a collaborative and supportive atmosphere

## **Bullying and Teen Dating Violence**

# V. Reporting Obligations

## A. Report to the Parent or Guardian of the Perpetrator

If after investigation acts of bullying or teen dating violence by a specific student are verified, not later than forty-eight (48) hours after the completion of the investigation the Building Principal/Safe School Climate Specialist or his/her designee shall notify the parent or guardian of the perpetrator in writing of that finding. If disciplinary consequences are imposed against such student, a description of such discipline shall be included in such notification. In addition, the school shall invite the parent/guardian of a student who commits any verified act of bullying or teen dating violence (after the completion of the investigation) to a meeting to communicate to the parents/guardians measures being taken by the school to ensure the student's safety and to prevent further acts of bullying and teen dating violence. Records will be maintained by the School Principal/Safe School Climate Specialist of the bullying and teen dating violence reports, subsequent investigations, and parental/guardian meetings.

## B. Reports to the Targeted Student and his/her Parent or Guardian

If after investigation acts of bullying or teen dating violence against a specific student are verified, the Building Principal/Safe Climate Specialist or his/her designee shall notify the parent or guardian of the victim of such finding not later than forty-eight (48) hours after the completion of the investigation. In providing such notification, care must be taken to respect the statutory privacy rights of the perpetrator of such bullying or teen dating violence. The specific disciplinary consequences imposed on the perpetrator, as reflected in the student's educational records, shall not be disclosed to the parents/guardians of the victim except as provided by law (e.g., court order/subpoena).

In addition, the school shall invite the parents/guardians of the student against whom the verified act of bullying or teen dating violence was directed after the completion of the investigation to a meeting to communicate to the parents/guardians the measures being taken by the school to ensure the student's safety and to prevent further acts of bullying and teen dating violence . Records will be maintained by the School Principal/Safe School Climate Specialist of the bullying and teen dating violence reports, subsequent investigations, and parental/guardian meetings.

Notices shall be simultaneously mailed to the parent/guardian with whom the student primarily resides and the other parent/guardian if requested. This mailing requirement shall be in effect for as long as the student attends the school in which the original request is made.

## **Bullying and Teen Dating Violence**

# C. List of Verified Acts of Bullying/Teen Dating Violence

The Principal/Safe School Climate Specialist of each school shall establish a procedure to document and maintain records relating to reports and investigations of bullying and teen dating violence in such school and maintain a list of the number of verified acts of bullying and teen dating violence in the school, and this list shall be available for public inspection upon request. The list shall be reported annually to the Department of Education in such manner as prescribed by the Commissioner of Education. Given that any determination of bullying involves repeated acts over time, each report prepared in accordance with Section V (B) (1) above that includes verified acts of bullying shall be tallied as one verified act of bullying, unless the specific actions that are the subject of the report involve separate and distinct acts of bullying. The list shall be limited to the number of such verified acts of bullying in the school, and it shall not set out the particulars of each verified act including, but not limited to, any personally identifiable student information which is confidential information by law.

## VI. Prohibition against Discrimination and Retaliation

# A. Safety

Discrimination and/or retaliation against any person who reports bullying or teen dating violence or provides information during an investigation of an act of bullying or teen dating violence or witnesses or has reliable information about bullying or teen dating violence is prohibited. The continuation and perpetuation of bullying or teen dating violence against a student through the dissemination of hurtful or demeaning material by any other student is prohibited. ARSD will not tolerate any unlawful or disruptive behavior including any form of bullying, cyberbullying, teen dating violence, discrimination, or retaliation in our school buildings, on school grounds, or in school-related activities. All reports and complaints of bullying, cyberbullying, teen dating violence, discrimination, and retaliation will be investigated promptly; and prompt action will be taken to end that behavior and restore the student's against whom such bullying or teen dating violence was directed (target's) sense of safety. This commitment is to be supported in all aspects of the school community including curricula, instructional programs, staff development, extracurricular activities, and parent/guardian involvement. Before formally investigating the allegations of bullying, teen dating violence, discrimination, or retaliation the Principal/Safe School Climate Specialist or designee will take steps to assess the need to restore a sense of safety to the alleged student against whom such bullying or teen dating violence was directed (target) and/or to protect the alleged target from possible further incidents. Responses to promote safety may include, but are not limited to, creating a personal safety plan; pre-

# **Bullying and Teen Dating Violence**

determining seating arrangements for the alleged victim (target) and/or the alleged perpetrator in the classroom, at lunch, or on the bus; identifying a staff member who will act as a "safe person" for the alleged student against whom such bullying or teen dating violence was directed (target); and altering the alleged perpetrator's schedule and access to the alleged target.

The Principal/Safe School Climate Specialist will take additional steps to promote safety during the course of and after the investigation, as necessary.

The Principal/Safe School Climate Specialist will implement appropriate strategies for protecting from bullying, teen dating violence, or retaliation a student who has reported bullying, teen dating violence, or retaliation; a student who has witnessed bullying, teen dating violence, or retaliation; a student who provides information during an investigation; or a student who has reliable information about a reported act of bullying, teen dating violence, or retaliation.

Within a reasonable period of time following the determination and the ordering of remedial and/or disciplinary action the Principal/Safe School climate specialist or designee will contact the victim to determine whether there has been a recurrence of the prohibited conduct and whether additional supportive measures are needed. If determined necessary, the Principal/Safe School Climate Specialist will work with appropriate school staff to implement them immediately.

## **B.** Law Enforcement Notification

The School Principal or his/her designee shall notify the appropriate local law enforcement agency when such Principal or the Principal's designee believes any acts of bullying or teen dating violence constitute criminal conduct.

# VII. Training Requirements for School Staff

- A. Certified staff of ARSD shall be provided in-service training on the prevention, identification, and response to school bullying and teen dating violence and the prevention of and response to youth suicide. (The Board, subject to the approval of the State Department of Education, is not required to offer an in-service program regarding bullying, teen dating violence, or youth suicide prevention and intervention, if it instead implements an evidence-based model approach to this issue.)
- B. Beginning teachers shall satisfactorily complete instructional modules as required by C.G.S. 10-145a which shall include a module in classroom management and climate and which

## **Bullying and Teen Dating Violence**

- shall include training regarding the prevention, identification, and response to school bullying and teen dating violence and the prevention of and response to youth suicide.
- C. Non-certified staff of ARSD will participate in annual training to be provided within available appropriations by the Connecticut State Department of Education. The training may be presented in person by mentors, offered in statewide workshops, or through online courses. Such training may include but is not limited to:
  - i. Developmentally appropriate strategies to prevent bullying and teen dating violence among students in school and outside the school setting
  - ii. Developmentally appropriate strategies for immediate and effective interventions to stop bullying and teen dating violence
  - iii. Information regarding the interaction and relationship between students committing acts of bullying or teen dating violence, students against whom such acts of bullying or teen dating violence are directed, and witnesses of such acts of bullying or teen dating violence
  - iv. Research findings on bullying and teen dating violence such as information about the types of students who have been shown to be at-risk for bullying or teen dating violence in the school setting
  - v. Information about the incidence and nature of cyberbullying as defined in C.G.S. 10-222d
  - vi. Internet safety issues as they relate to cyberbullying

# VIII. Notification Requirements

- A. A copy of ARSD's Safe School Climate Plan shall be provided in written or electronic format to all ARSD employees annually at the beginning of each school year.
- B. The ARSD's Safe School Climate Plan shall be made available on the Board's website and on the website of each individual school with ARSD. Such posting shall occur within thirty (30) days of the approval of such plan by the Board.
- c. ARSD's Safe School Climate Plan shall be included in the ARSD's publication of the rules, procedures, and standards of conduct for schools and in all student handbooks.

## IX. School Climate Assessments

- A. On or after July 1, 2012 and biennially thereafter the Board requires each school within ARSD to complete an assessment using the school climate assessment instruments including surveys approved and disseminated by the State Department of Education.
- B. Completed assessments shall be shared with the Board and then submitted by the Board to the State Department of Education.

# **Bullying and Teen Dating Violence**

# X. Bullying/Teen Dating Violence Through the Use of Technology (Cyberbullying)

An emerging form of bullying and teen dating violence is the use of technology to threaten, intimidate, ridicule, humiliate, insult, or harass. Technology enables aggressive expression toward others and does not rely on physical strength or physical contact. By using a cell phone or the internet a student can quickly and aggressively spread rumors, threats, hate mail, or embarrassing photos through text messages, e-mails, or instant messages. There are a number of social networking sites (MySpace, Facebook, Twitter, etc.) available to our students that can be misused and/or abused for bullying or teen dating violence purposes. Any alleged misuse or abuse must be reported to any staff member or the Safe School Climate Specialist.

ARSD's discipline policy states that misuse on or off campus of electronic devices for threatening/bullying/hazing, harassment, or committing teen dating violence is a violation and can be the basis for discipline on or off campus. When information is received that a student or students are involved in bullying or teen dating violence through the use of technology either as the actor or a member of a group or the victim the following will be considered:

- If it takes place on campus or at a school-sponsored event, disciplinary action will be taken.
- If it takes place off campus, a school may take disciplinary action if the incident poses a likelihood of substantial disruption to the educational process or the day-to-day operations of the school.

# **XI.** Relationship to Other Laws

- A. Consistent with state and federal laws and the policies of ARSD and school rules, no person shall be discriminated against in admission to a public school of any town or in obtaining the advantages, privilege, and courses of study of such public school on account of race, color, gender, religion, national origin, or sexual orientation. Nothing in the "Plan" prevents the school or ARSD from taking action to remediate discrimination or harassment based on a person's membership in a legally protected category under local, state, or federal law or ARSD policies.
- B. In addition, nothing in the "Plan" is designed or intended to limit the authority of the school or ARSD to take disciplinary action under applicable laws or local school or ARSD policies in response to violent, harmful, or disruptive behavior, regardless of whether the "Plan" covers the behavior.

# **Bullying and Teen Dating Violence**

# XII. Immunity for Board of Education, School Employees, Others

Members of the Board and school employees are protected by statute against damage claims in the implementation of a safe school climate plan and in accordance with a school district safe school climate plan, report, investigate, or respond to bullying and teen dating violence. PA 11-232 and PA 14-234 extend this immunity to reports of bullying or teen dating violence incidents by parents, students, and others to a school employee according to a safe school climate plan.

To be immune these parties must act in good faith and, in the case of a school employee or Board of Education, within the scope of their duties. The immunity does not cover gross, wanton, reckless, or willful misconduct.

Legal Reference: Connecticut General Statutes

C.G.S. 10-220a. In-service training. Professional development committees. Institutes for educators. Cooperating teacher program, regulations.

C.G.S. 10-222d. Safe school climate plans. Definitions. School Climate assessments.

C.G. S. 10-222g. Prevention and intervention re bullying.

C.G.S. 10-222j. State-wide safe school climate resource network. C.G.S. 10-222k. District safe school climate coordinator. Safe school climate specialist. Safe school climate committee. (as amended by PA 21-95, Section 14).

C.G.S. 10-2221. Immunity of school employees, students, parents or guardians, individuals and boards of education from liability for certain actions relating to reporting, investigating and responding to school bullying.

## **Student Health Services**

#### School District Medical Advisor

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

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

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

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

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

#### **Health Records**

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

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

## **Regular Health Assessments**

Health assessments shall be required in grade 7 and in grade 10 by a legally qualified practitioner of medicine, an advanced practiced registered nurse licensed pursuant to C.G.S.

## **Student Health Services**

Chapter 378, a physician assistant licensed pursuant to C.G.S. Chapter 370, a school medical advisor or a legally qualified practitioner of medicine, an advanced practice registered nurse, or a physician assistant stationed at any military base prior to school entrance in Connecticut. The purpose of the health assessment is to ascertain whether a student has any physical disability or other health problem. Such health assessments shall include:

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

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

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

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

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

## **Student Health Services**

## **Postural Screening**

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

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

## **Tuberculin Testing**

It is required that students at each mandated health assessment be screened for their risk of exposure to tuberculosis (TB). A child determined to be at risk for exposure to TB should be required to be tested.

## **Immunizations/Vaccinations**

No student will be allowed to enroll in ARSD schools without adequate immunization against the following diseases:

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

All students in grades 7-12 are required to have received 2 doses of measles, mumps, and rubella vaccine or demonstrate serologic proof of immunity. Students entering seventh grade shall show proof of having received 2 doses of varicella vaccine, laboratory confirmation of immunity, or present a written statement signed by a physician, physician assistant, or advanced practice registered nurse indicating the individual has had varicella based on family or medical history.

## **Student Health Services**

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

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

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

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

- 1. They present a certificate from a physician, physician assistant, advanced practice registered nurse, or local health agency stating that initial immunizations have been given and additional immunizations are in process under guidelines and schedules specified by the Commissioner of Health Services or
- 2. They present a certificate from a physician, physician assistant, or advanced practice registered nurse stating that in the opinion of such medical provider, immunization is medically contraindicated because of the physical condition of such child. Such certification shall be provided on the medical exemption certificate form developed by the Department of Public Health and available on its website or
- 3. They present a written statement from their parents/guardians that such immunization would be contrary to the religious beliefs of such child or his/her parents/guardians; such statement to be officially acknowledged by a notary public or a judge, a court clerk/deputy clerk, a town clerk, a justice of the peace, a Connecticut attorney, or a school nurse, and such religious exemption was granted prior to April 28, 2021 (by midnight April 27, 2021). Such student retains this exemption through grade twelve, even if the student transfers to another school in Connecticut or in the case of measles, mumps, or rubella present a certificate from a physician, physician assistant, or advanced practice registered nurse or from the Director of Health in such child's present or previous town of residence, stating that the child has had a confirmed case of such disease or
- 4. In the case of hemophilus influenza type B has passed his or her fifth birthday or
- 5. In the case of diphtheria, tetanus, and pertussis has a medical exemption confirmed in writing by a physician, physician assistant or advanced practice registered nurse (per C.G.S. 19a-7f).

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

## **Student Health Services**

## **Health Assessments/Interscholastic Sports Programs**

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

## **Student Medical Care at School**

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

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

(cf. 5142 - Student Safety)

(cf. 5141.4 - Child Abuse and Neglect)

(cf. 5141.5 - Suicide Prevention)

(cf. 6145.2 - Interscholastic/Intramural Athletics)

(cf. 6171 - Special Education)

Legal Reference: Connecticut General Statutes

10-203 03 Sanitation

10-204 Required immunizations (as amended by PA 15-174, PA 15-242,

and PA 21-6)

## **Student Health Services**

10-204 04cImmunity from liability

10-205 Appointment of school medical advisors

10-206 Health assessments, as amended by PA 07-58 and PA 11-179 and PA 18-168

10-206 Free health assessments

10-207 07 Duties of medical advisers, (as amended by P.A. 12-198)

10-208 Exemption from examination or treatment

10-208 08a Physical activity of student restricted; boards to honor notice

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

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

10-212 School nurses and nurse practitioners

10-212a Administration of medicines by school personnel

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

10-214a Eye protective devices

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

10-217a Health services for children in private non-profit schools; payments from the state, towns in which children reside and private non-profit schools

Department of Public Health, Public Health Code  $-\,10\text{-}204\text{a-}2\text{a},\,10\text{-}\,204\text{a-}3\text{a},$  and 10-204a-4

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

# **Student Health Services**

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

PA 18-168 An Act Concerning the Department of Public Health's Recommendations Regarding Various Revisions to the Public Health Statutes Sections 7-9, 539, & 540

# **School Safety**

#### **School Resource Officer**

In order to make schools more orderly, safer, and secure, Amity Regional School District No. 5 (ARSD) may utilize a police officer to deliver services as a School Resource Officer (SRO), as guided by an agreement between the Board of Education (Board) and a law enforcement agency. The agreement shall address daily interactions among students, school personnel, and police officers and shall include a graduated response model for student discipline.

The Superintendent of Schools will develop administrative regulations as necessary to implement this policy. The Board or its designee will work in cooperation with the law enforcement agency in the placement of a School Resource Officer at Amity Regional High School. Any additional ARSD facilities upon approval of the Board may also qualify for placement of an SRO. The Superintendent will make such suggestions to the Board when needed.

It is understood and agreed that the Board and the Police Department officials share the following goals and objectives with regard to the School Resource Officer (SRO) Program in the schools:

- 1. to foster educational programs and activities that will increase student's knowledge of and respect for the law and the function of law enforcement agencies
- 2. to encourage SROs to attend extra-curricular activities held at schools when possible
- 3. to act swiftly and cooperatively when responding to major disruptions and flagrant criminal offenses at school such as: disorderly conduct by trespassers, the possession and/or use of weapons on campus, the sale and/or distribution of controlled substances, and riots
- 4. to report serious crimes that occur on campus and to cooperate with the law enforcement officials in their investigation of crimes that occur at school
- 5. To cooperate with law enforcement officials in their investigations of criminal offenses which occur off campus and
- 6. to be involved in the development of ARSD and school safety/crisis plans

# **School Safety**

Duties include but are not limited to:

- 1. the observation and reporting of any unlawful act
- 2. the prevention of theft or misappropriation of any item of value
- 3. the control of access to premises being protected
- 4. the maintenance of order and safety at public activities
- 5. protection of ARSD property, students, staff, and persons and property on or about ARSD property or while attending ARSD-sponsored activities
- 6. investigating and documenting specific incidents
- 7. assistance in identifying, intervening, and communicating with at-risk students
- 8. provision of crime prevention education
- 9. promotion of a positive student attitude toward law enforcement
- 10. operating as a liaison between the community and ARSD

The Board shall enter into a Memorandum of Understanding (MOU) with the local police department that defines the officer's role and responsibilities. The MOU must address daily interactions among students, school personnel, and police officers and must include a graduated response model for student discipline. Any such MOU entered into, extended, updated, or amended on or after July 1, 2021 shall include a provision requiring all school resource officers to complete while in the performance of their duties as school resource officers and during periods when such officers are assigned to be at the school any separate training specifically related to social-emotional learning and restorative practices provided to ARSD certified employees.

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(cf. 5131 - Student Conduct)
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(cf. 5131.5 - Vandalism)

(cf. 5131.6 - Drugs, Tobacco, Alcohol)

(cf. 5131.7 - Weapons and Dangerous Instruments)

(cf. 5131.8 - Off School Grounds Misconduct)

(cf. 5141.6 - Crisis Management)

(cf. 5142 - Safety)

(cf. 5144.1 - Use of Physical Force)

# **School Safety**

(cf. 5145.11 - Police in Schools) (cf. 5145.12 - Search and Seizure)

Legal Reference: Connecticut General Statutes

4-176e through 4-180a. Contested Cases. Notice. Record.

10-220 Duties of boards of education.

10-233a through 10-233f. Suspension, removal and expulsion of students, as amended by PA 95- 304, PA 96-244, and PA 98-139.

53a-3 Definitions.

53a-217b Possession of Firearms and Deadly Weapons on School Grounds.

GOALS 2000: Educate America Act, Pub. L. 103-227. 18 U.S.C. 921 Definitions.

Title III - Amendments to the Individuals with Disabilities Education Act.

Sec. 314 (Local Control Over Violence)

Elementary and Secondary Act of 1965 as amended by the Gun Free Schools Act of 1994.

P.L. 105-17 The Individuals with Disabilities Act, Amendment of 1997.

Kyle P. Packer PPA Jane Packer v. Thomaston Board of Education.