

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, August 15, 2022, 6:30 pm
25 Newton Road, Woodbridge, CT

- 1. CALL TO ORDER**
- 2. PLEDGE OF ALLEGIANCE**
- 3. BOARD MEMBER RECOGNITION**
- 4. ELECTION OF CHAIRPERSON**
- 5. APPROVAL OF MINUTES**
 - a. District Meeting on the Budget – June 13, 2022 *Page 4*
 - b. Regular Meeting – June 13, 2022 *Page 5*
- 6. DISCUSSION ON STADIUM FIELD CORRESPONDENCE (Executive Session)**
- 7. POSSIBLE ACTION ON STADIUM FIELD CORRESPONDENCE**
- 8. PUBLIC COMMENT**
- 9. SUPERINTENDENT’S REPORT**
 - a. Personnel Report *Page 14*
 - b. Superintendent Report *Page 18*
 - c. COVID-19 School Operations Update 2022-2023
- 10. DISCUSSION AND POSSIBLE ACTION ON THE ADOPTION OF THE AMITY PORTRAIT OF THE GRADUATE**
- 11. DISCUSSION AND POSSIBLE ACTION ON 2022-2023 DISTRICT CALENDAR *Page 22***
- 12. CORRESPONDENCE**
- 13. CHAIRMAN’S REPORT**
 - a. Committee Reports
 1. ACES
 2. CABE
 3. Communications
 4. Curriculum
 5. District Health and Safety
 6. Diversity, Equity, and Inclusion Executive Committee
 7. District Technology
 8. Facilities
 - a. Monthly Report *Page 23*
 9. Finance
 - a. Presentation of 2023-2024 Budget Calendar *Page 25*
 - b. Presentation of Annual Report on Reserve Fund for Capital and Non-Recurring Expenditures *Page 28*
 - c. Discussion and Possible Action to Appropriate Funds to Capital and Non-recurring *Page 30*

- d. Discussion and Possible Action on Contracts over \$35,000
 - 1. Music Instruments *Page 32*
- e. Discussion of Monthly Financial Statements
 - 1. Fiscal Year 2021-2022 *Page 35*
 - 2. Fiscal Year 2022-2023 *Page 49*
- f. Director of Finance and Administration Approved Transfers EOY – FY22 *Page 79*
- g. Other
- 10. Policy
 - a. First Read
 - 1. Policy 6144 Controversial Topics *Page 85*
 - b. Second Read
 - 1. Policy 5000 Concepts and Roles in Student Policies *Page 88*
 - 2. Policy 5010 Goals and Objectives *Page 89*
 - 3. Policy 5111.1 Foreign Exchange Students *Page 90*
 - 4. Policy 5112 Ages of Attendance *Page 91*
 - 5. Policy 5113.2 Attendance *Page 93*
 - 6. Policy 5144.1 Restraint, Seclusion, and Exclusionary Time-Out *Page 102*
 - 7. Policy 4148 Employee Protection *Page 109*
 - 8. Policy 6141.5 Advanced College Opportunity *Page 111*
 - 9. Policy 6141.51 Advanced Courses or Programs, Eligibility Criteria for Enrollment *Page 112*
 - 10. Policy 6141.52 Challenging Curriculum Policy *Page 115*
 - 11. Personnel
 - 14. **NEW BUSINESS**
 - 15. **ITEMS FOR THE NEXT AGENDA** – Due to Chairperson by August 31, 2022
 - a. Request to discuss CABE services to complete the Board of Education self-evaluation, a Board of Education Roles & Responsibilities training, and a training on Parliamentary procedure
 - 16. **ADJOURNMENT**



Jennifer P. Byars, Ed.D.
Superintendent of Schools

pc: Town Clerks Bethany, Orange, Woodbridge

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

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

AMITY REGIONAL SCHOOL DISTRICT NO. 5
BOARD OF EDUCATION
Bethany Orange Woodbridge



NORMS

BE RESPECTFUL

- Model civil discourse and discussion, respecting all viewpoints, welcoming ideas, and disagreeing with courtesy.
- Collaborate as a team.
- Listen actively and refrain from interruptions or side conversations.
- Respect each others' time by brevity of comment.
- Be fully present and mindful of the distractions caused by electronic devices.
- Grow and learn from each other.

HONOR THE POSITION

- Work within the Board's statutory and policy duties.
- Prepare for Board & Committee meetings by reading the packet prior to the meeting.
- Treat each student, parent, and stakeholder respectfully and assist them in following the designated chain of command.
- Be reflective, including conducting an annual Board self-evaluation.

REPRESENT THE BOARD WITH UNITY AND PRIDE

- Make decisions based on what is best for the collective student body of Amity Regional School District No. 5.
- Respect the professional expertise of the staff.
- Be flexible in response to challenges.
- Collaboratively engage in discussions and actions and once voted on, provide undivided support of Board decisions in both public and private.

AMITY REGIONAL SCHOOL DISTRICT NO. 5 BOARD OF EDUCATION
DISTRICT MEETING MINUTES
JUNE 13, 2022, 5:30 P.M.
25 Newton Road, Woodbridge, CT

BOARD MEMBERS PRESENT

John Belfonti, Christopher Browe, Paul Davis, Carla Eichler, Sean Hartshorn, Andrea Hubbard, Christina Levere-D'Addio, Dr. Jennifer Turner (arrived 6:17 p.m.)

BOARD MEMBERS ABSENT

Shannan Carlson, Dr. Carol Oladele, Patrick Reed, Dr. K. Sudhir, Donna Schuster

STAFF MEMBERS PRESENT

Dr. Jennifer Byars, Theresa Lumas, Kathy Burke, Kathy Kovalik, Jill LaPlante

Chairperson Belfonti called the meeting to order at 6:15 p.m.

MOTION by Sean Hartshorn, SECOND by Andrea Hubbard, to nominate Christopher Browe as moderator to conduct the District Meeting

VOTES IN FAVOR, 7 (unanimous)

MOTION CARRIED

MOTION by Christopher Browe, SECOND by Sean Hartshorn, to close nominations for moderator to conduct the District Meeting

VOTES IN FAVOR, 7 (unanimous)

MOTION CARRIED

Christopher Browe read the Call of the Meeting (Legal Notice)

Christopher Browe turned the meeting over to Board of Education Chairperson, John Belfonti

MOTION by Christopher Browe, SECOND by Sean Hartshorn, to adjourn to a machine/ballot vote to be held in the towns of Bethany, Orange, and Woodbridge on Tuesday, May 24, 2022, from 6:00 a.m. to 8:00 p.m.

VOTES IN FAVOR, 8 (unanimous)

MOTION CARRIED

MOTION by Carla Eichler, SECOND by Dr. Turner, to adjourn meeting

VOTES IN FAVOR, 8 (unanimous)

MOTION CARRIED

Meeting adjourned at 6:25 p.m.

Respectfully submitted,

Pamela Pero

Pamela Pero

Recording Secretary

AMITY REGIONAL SCHOOL DISTRICT NO. 5 BOARD OF EDUCATION
JUNE 13, 2022 REGULAR MEETING MINUTES
6:30 P.M., 25 NEWTON ROAD, WOODBRIDGE, CT

BOARD MEMBERS PRESENT

John Belfonti, Christopher Browe, Paul Davis, Carla Eichler, Sean Hartshorn, Andrea Hubbard, Dr. Carol Oladele, Patrick Reed, Donna Schuster, Dr. Jennifer Turner, Christina Levere-D'Addio (departed 9:38 p.m.)

BOARD MEMBERS ABSENT

Shannan Carlson, Dr. K. Sudhir

STUDENT BOARD MEMBERS PRESENT

Alison Bowler, Marin Korenaga

STAFF MEMBERS PRESENT

Dr. Jennifer Byars, Theresa Lumas, Kathy Burke, Stefan Ciceron, Shaun DeRosa, Peter Downhour, Kathleen Kovalik, Jill LaPlante, Anna Mahon, Dr. Jason Tracy

1. CALL TO ORDER

Chairperson Belfonti called the meeting to order at 6:32 p.m.

2. PLEDGE OF ALLEGIANCE

Recited by those present

3. APPROVAL OF MINUTES

a. Regular Meeting - May 9, 2022

*MOTION by Paul Davis, SECOND by Sean Hartshorn, to approve minutes as submitted
VOTES IN FAVOR, 10 (Belfonti, Browe, Davis, Eichler, Hartshorn, Levere-D'Addio, Oladele, Reed,
Schuster, Turner)
ABSTAINED, 1 (Hubbard)
MOTION CARRIED*

b. District Meeting on the Budget - May 23, 2022

*MOTION by Sean Hartshorn, SECOND by Carla Eichler, to approve minutes as submitted
VOTES IN FAVOR, 5 (Belfonti, Browe, Eichler, Hartshorn, Reed)
ABSTAINED, 6 (Davis, Hubbard, Levere-D'Addio, Oladele, Schuster, Turner)
MOTION CARRIED*

c. Special Meeting - May 31, 2022

*MOTION by Christina Levere-D'Addio, SECOND by Patrick Reed, to approve minutes as
submitted
VOTES IN FAVOR, 11 (unanimous)
MOTION CARRIED*

4. STUDENT REPORT

a. Monthly Report

Chairperson Belfonti publicly thanked Alison Bowler for her service as Board of Education student representative and welcomed the new Board of Education student representative, Samuel Bae.

5. ONE BOOK, ONE AMITY PRESENTATION

6. PUBLIC COMMENT

One resident spoke about the student protest and policies.
One resident spoke about the DEI Coach position.

7. SUPERINTENDENT'S REPORT

a. Personnel Report

Dr. Byars publicly thanked Dr. Mahon for her service to Amity Regional High School and congratulated her on her new position.

b. Superintendent Report

8. CORRESPONDENCE

Summarized by Carla Eichler

9. STUDENT DISCIPLINARY DISCUSSION (Due to confidentiality of individual student records, anticipated in Executive Session)

MOTION by Patrick Reed, SECOND by Sean Hartshorn, to enter Executive Session for Student Disciplinary Discussion and invite Dr. Byars, Kathy Burke, Dr. Mahon, and Dr. Tracy

VOTES IN FAVOR, 11 (unanimous)

MOTION CARRIED

Entered Executive Session at 7:19 p.m.

Exited Executive Session at 9:21 p.m.

10. CHAIRMAN'S REPORT

Chairperson Belfonti publicly thanked Dr. Mahon on behalf of the Board of Education for her guidance and leadership as principal of Amity Regional High School

a. Committee Reports

1. ACES

2. CABE

3. Communications

4. Curriculum

5. District Health and Safety

6. Diversity, Equity, and Inclusion Executive Committee

7. District Technology

a. Monthly Report

8. Facilities

a. Monthly Report

9. Finance

a. Discussion and Possible Action on Healthy Food Certification

MOTION by Carla Eichler, SECOND by Sean Hartshorn, to approve the following:

- 1. Pursuant to C.G.S. Section 10-215f, the board of education or governing authority certifies that all food items offered for sale to students in the schools under its jurisdiction, and not exempted from the Connecticut Nutrition Standards published by the Connecticut State Department of Education, will comply with the Connecticut Nutrition Standards during the period of July 1, 2022, through June 30, 2023. This certification shall include all food offered for sale to students separately from reimbursable meals at all times and from all sources, including but not limited to school stores, vending machines, school cafeterias, culinary programs, and any fundraising activities on school premises sponsored by the school or non-school organizations and groups.*
- 2. The board of education or governing authority will allow the sale to students of food items that do not meet the Connecticut Nutrition Standards provided that the following conditions are met: 1) the sale is in connection with an event occurring after the end of the regular school day or on the weekend; 2) the sale is at the location of the event; and 3) the food items are not sold from a vending machine or school store. An "event" is an occurrence that involves more than just a regularly scheduled practice, meeting, or extracurricular activity. For example, soccer games, school plays, and interscholastic debates are events but soccer practices, play rehearsals, and debate team meetings are not. The "regular school day" is the period from midnight before to 30 minutes after the end of the official school day. "Location" means where the event is being held and must be the same place as the food sales.*
- 3. The board of education or governing authority will allow the sale to students of beverages not listed in Section 10-221q of the Connecticut General Statutes provided that the following conditions are met: 1) the sale is in connection with an event occurring after the end of the regular school day or on the weekend; 2) the sale is at the location of the event; and 3) the beverages are not sold from a vending machine or school store. An "event" is an occurrence that involves more than just a regularly*

scheduled practice, meeting, or extracurricular activity. The “school day” is the period from midnight before to 30 minutes after the end of the official school day. “Location” means where the event is being held and must be the same place as the beverage sales.

VOTES IN FAVOR, 10 (unanimous)

MOTION CARRIED

b. Discussion and Possible Action on Contracts over \$35,000

- 1. Food Service Management**
- 2. Dishwasher**
- 3. Bethany Courtyard**
- 4. Outdoor Structures**
- 5. Site-Based Grounds – corrections from May agenda**
- 6. 1:1 Devices – FY22-23 Budget**

MOTION by Dr. Oladele, SECOND by Sean Hartshorn, to vote on all contracts over \$35,000 at the same time

VOTES IN FAVOR, 10 (unanimous)

MOTION CARRIED

MOTION by Christopher Browe, SECOND by Patrick Reed, to approve the following with the words, “dependent on State approval” added to item #1 below regarding Compass Group, Chartwells:

- 1. Award a 5-year contract to Compass Group, Chartwells for meal services; the management fee is \$89,024 and the administrative fee is \$24,304 in year 1 dependent on State approval.*
- 2. Purchase a commercial grade dishwasher from Warehouse Store Fixture Co for \$55,221.42*
- 3. Award the Bethany Courtyard project to Diversity Construction Group for \$62,000.*
- 4. Approve the construction of two outdoor classrooms, one at each middle school, to O’Brien and Sons at \$330,825.*
- 5. Award the site-based grounds maintenance program for July 1, 2022 to June 30, 2025 to Sports Turf of Orange, Connecticut at the price of \$220,000 (\$221,000 and \$221,500 incorrect prices), \$222,500, and \$225,000 for a three-year contract period. The Board*

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reserves the right to cancel the contract if Sports Turf of Orange, Connecticut fails to perform in a satisfactory manner.

6. *Fiscal Year 2022-2023: Approve the Lenovo Lease Corporation for Whalley Computer for 59,212.49 per year for 3 years for 350 devices.*

VOTES IN FAVOR, 10 (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 Andrea Hubbard, to approve the following:

1. *the following budget transfer for Amity Middle School Bethany courtyard repairs.*

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
03-14-2600-5410	Utilities	\$62,000	
01-14-2600-5420	Repair & Maintenance		\$62,000

2. *the following budget transfer for construction of the outdoor structures at the middle schools.*

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
04-12-6110-5560	Tuition - Public	\$98,299	
05-15-0000-5850	Contingency- General	\$96,526	
01-14-2600-5720	Improvements to Sites		\$158,000
02-14-2600-5720	Improvements to Sites		\$ 36,825

3. *the following budget transfer to Amity Middle School Bethany modular roof restoration.*

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
01-14-2600-5613	Custodial Supplies	\$14,969	
01-14-2600-5715	Improvements to Sites	\$ 1,820	
02-14-2600-5613	Custodial Supplies	\$ 7,171	
01-14-2600-5420	Repair & Maintenance		\$23,960

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4. *the following budget transfer to begin flushing the glycol system at Amity Middle School Orange.*

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
05-14-2600-5715	Contingency - Facilities	\$56,996	
05-15-0000-5850	Contingency- General	\$43,004	
02-14-2600-5420	Repair & Maintenance		\$100,000

5. *the following budget transfer to cover a refrigerator for Consumer Science classroom.*

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
03-14-2219-5611	Instructional Supplies	\$5,474	
03-11-1007-5731	Equipment Replacement		\$ 5,474

6. *the following budget transfer to cover a homebound medical services.*

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
04-12-2151-5330	Professional-Technical	\$12,500	
04-13-2130-5330	Professional-Technical		\$12,500

VOTES IN FAVOR, 9 (Belfonti, Browe, Davis, Eichler, Hubbard, Oladele, Reed, Schuster, Turner)
 ABSTAINED, 1 (Hartshorn)
 MOTION CARRIED

f. Designation of available funds in the Capital Nonrecurring Account

MOTION by Carla Eichler, SECOND by Patrick Reed, to designate \$132,400 from the FY21 CNR transfer to the lecture hall project and designate \$100,000 from the undesignated funds (prior lighting project) toward a new lighting project.

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
17-17-5856	Transfer Account	\$132,400	
00-15-0055-5715	Improvements to Buildings (lecture hall)		\$132,400
00-15-0099-5899	Undesignated	\$100,000	
00-15-0060-5420	Repair & Maintenance		\$100,000

VOTES IN FAVOR, 10 (unanimous)
 MOTION CARRIED

g. Other

1. **Capital Projects Update**
2. **Audit engagement letter**

10. Policy

a. First Read

- 1. Policy 5000 Concepts and Roles in Student Policies**
- 2. Policy 5010 Goals and Objectives**
- 3. Policy 5111.1 Foreign Exchange Students**
- 4. Policy 5112 Ages of Attendance**
- 5. Policy 5113.2 Attendance**
- 6. Policy 6141.51 Advanced Courses or Programs, Eligibility Criteria for Enrollment**
- 7. Policy 6141.52 Challenging Curriculum Policy**
- 8. Policy 6141.5 Advanced College Opportunity**

b. Second Read

- 1. Policy 5144.1 Restraint and Seclusion**
- 2. Policy 4148 Employee Protection**
- 3. Bylaw 9325 Meeting Conduct**

Policy 5144.1 Restraint and Seclusion and Policy 4148 Employee Protection are postponed until after Policy Committee review

*MOTION by Sean Hartson, SECOND by Patrick Reed, to approve Bylaw 9325 Meeting Conduct
VOTES IN FAVOR, 10 (unanimous)
MOTION CARRIED*

11. Personnel

a. Discussion and Possible Action on Non-Union Wages (Executive Session)

MOTION by Patrick Reed, SECOND by Carla Eichler, to enter Executive Session to discuss Non-Union Wages and invite Dr. Byars

VOTES IN FAVOR, 10 (unanimous)

MOTION CARRIED

Entered Executive Session at 10:31 p.m.

Exited Executive Session at 10:39 p.m.

MOTION by Christopher Browe, SECOND by Dr. Turner, to approve Non Union Wages presented to Board of Education by Dr. Byars during Executive Session

VOTES IN FAVOR, 10 (unanimous)

MOTION CARRIED

11. NEW BUSINESS

12. ITEMS FOR THE NEXT AGENDA – Due to Chairperson by July 31, 2022

13. ADJOURNMENT

MOTION by Patrick Reed, SECOND by Donna Schuster, to adjourn meeting

VOTES IN FAVOR, 10 (unanimous)

MOTION CARRIED

Meeting adjourned at 10:42 p.m.

Respectfully submitted,

Pamela Pero

Pamela Pero

Recording Secretary

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



Dr. Jennifer P. Byars
Superintendent of Schools

jennifer.byars@amityregion5.org
203.392.2106

July 28, 2022

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:**

Andre Hauser – Principal – Andre joins the Amity administrative team bringing a wealth of experience as a high school administrator, most recently serving as the Principal of Waterford High School since 2013. His commitment to education is further exhibited by the distinction of serving as President of the Connecticut Association of Schools (CAS), earning the CAS Citation in 2022. He also serves as the State Coordinator for the National Association of Secondary School Principals (NASSP) and is a member of the Connecticut Interscholastic Athletic Conference (CIAC) Board of Control. Andre holds a Bachelor's Degree in Journalism and English from the University of North Carolina at Chapel Hill, a Master's Degree in Education from Sacred Heart University and a 6th Year Certificate in Educational Administration from the University of Connecticut.

Theresa Biagiarelli – F/T Spanish Teacher – Theresa brings 13 years of experience as a Spanish Language Teacher with the majority of that time teaching for Guilford Public Schools. She also applies her language skills working in the education departments of local museums. Theresa earned her Bachelor's Degree in Spanish and Art History from Mount Holyoke College and her Master's Degree in Art History from University of Massachusetts.

Melanie Jaramillo – F/T Special Education Teacher – Melanie completed her student teaching at Aspire Living and Learning Academy. She also served as a Special Education Resident Long Term Substitute at Bassick High School in Bridgeport. Melanie earned her Bachelor's Degree in General Studies and her Master's Degree in Educational Psychology both from the University of Connecticut.

Bridget O'Neill – F/T Social Studies Teacher – Bridget brings 4 years of experience as a Social Studies Teacher coming to us from the Windsor Public School District. During her time in Windsor, Bridget combined her passion for Art and Social Studies designing and implementing a new Art History Curriculum. She earned her Bachelor's Degree in Art from Southern CT. State University and her Master's Degree in Social Studies from the University of Bridgeport.

Rebecca Rivera – F/T School Psychologist – Rebecca brings 4 years of experience as a School Psychologist serving those years in the New Fairfield Public School District. Her experience ranges from Pre-K to Grade 12 in all facets of School Psychology, including crisis intervention and integrating school wide social emotional learning. She also serves as the Secretary for the Connecticut Association of School Psychologists (CASP). Rebecca earned her Bachelor's Degree in Social Work from Western CT. State University and her Master's Degree and 6th Year Certificate, both in School Psychology, from Fairfield University.

Elizabeth Scheller – F/T Special Education Teacher – Elizabeth brings to Amity 6 years of experience as a Special Education Teacher, most recently teaching in the Fairfield Public School District. Elizabeth has experience in both the self-contained and resource classrooms. She earned her Bachelor’s Degree in Accounting from Mount Saint Mary’s University and her Master’s Degree in Special Education from Southern Ct. State University.

• **Amity Regional Middle School – Bethany:**

Thomas Newman – F/T Math Teacher – Tom has been a part of the Amity community for several years serving as a math teacher as well as coaching various Amity sports teams. Tom made the decision to accept a teaching position in his hometown of East Granby for the last school year, however, he still remaining an Amity coach despite the long commute and now returns to the position of math teacher for Amity. Tom brings 12 years of experience at both middle and high school levels. He earned his Bachelor’s Degree in Middle Level Education from the University of South Carolina.

Lindsay Galpin – F/T English Teacher – Lindsay brings 9 years of experience as an English Teacher, Most recently from the Waterbury Public School District. Her entire teaching background has been at the middle school level and she completed her student teaching at Amity Regional High School in 2013. Lindsay earned her Bachelor’s Degree in English from Eastern CT. State University and her Master’s Degree in Education from the University of New Haven.

✚ **Amity Regional Middle School – Orange:** NONE

✚ **NEW HIRES-SUBSTITUTES:** NONE

✚ **NEW HIRES-NON-CERTIFIED:**

Alexander McPadden – IT Specialist – Technology Department-Amity Regional High School
Matthew Benton – Paraprofessional - Amity Transition Academy, Univ. of New Haven Campus

✚ **NEW HIRES-COACHES:** NONE

NEW ASSIGNMENT:

Pamela DellaTorre – Category II Administrative Asst – Amity Regional High School eff. 8/15/22

✚ **TRANSFERS:**

Amy Benton – FT English Teacher at Amity Middle School-Bethany to the position of Digital Media Teacher at Amity Middle School-Bethany, effective 2022-2023 school year.

Tyshawn Cannon – FT Paraprofessional at Amity Middle School-Bethany to the position of FT Paraprofessional at Amity Middle School-Orange, effective 2022-2023 school year.

✚ **RESIGNATIONS:**

Mariza Carbone – Spanish Language Teacher – Amity Middle School-Orange, eff. 06/30/2022

Cody Rodrigues – Spanish Language Teacher – Amity Middle School-Orange, eff. 06/30/2022

Noel McNamara – School Psychologist – Amity Middle School-Bethany, eff. 07/11/2022

Julie Kile – Math Teacher – Amity Middle School-Bethany, eff. 07/12/2022

Dameon Kellogg – Math Teacher – Amity Regional High School, eff. 07/13/2022

Theresa Roche – Math Teacher – Amity Regional High School, eff. 07/28/2022

Kristi Bellara – Coordinator of Pupil Services – District, eff. 07/28/2022

John Crandall – Math Interventionist – Amity Middle School-Bethany, eff. 06/30/2022

Nicholas Dottori – Asst. Girls Basketball Coach – Amity Regional High School, eff. 06/27/2022

Mario Yopez – Asst. Boys Soccer Coach – Amity Regional High School, eff. 06/28/2022
Andrew Starrett – Asst. Boys Soccer Coach – Amity Regional High School, eff. 07/6/2022
Michael Brady – Asst. Boys Basketball Coach – Amity Regional High School, eff. 07/8/2022
Andrew Reichbart – Asst. Football Coach – Amity Regional High School, eff. 07/15/2022
Lauren Pitney – Asst. Softball Coach – Amity Regional High School, eff. 07/18/2022

✚ **RETIREMENTS:**

William Dahn – Technology Education Teacher, Amity Middle School-Orange eff. 06/30/2022
Robert Musco – Library Media Specialist, Amity Regional High School eff. 06/30/2022
Theresa Donnelly – Paraprofessional, Amity Middle School-Orange eff. 06/30/2022
George Schumacher – Custodian, Amity Middle School-Bethany eff. 09/09/2022

✚ **Certified Positions Still Pending:**

- **Math Teacher** (3) One per school
- **Library Media Specialist** – Amity Regional High School
- **School Psychologist** – Amity Middle School Bethany
- **Spanish Language Teacher** (2) – Amity Middle School-Orange
- **Digital Media Teacher** – Amity Middle School-Orange (*Pending Final Interview*)
- **Tech Ed Teacher** – Amity Middle School-Orange (*Pending Final Interview*)

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

August 15, 2022

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

NEW HIRES-CERTIFIED:

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

Elizabeth Tremper – F/T Digital Media Teacher – Elizabeth brings 13 years of teaching experience as a Media Specialist as well as a certified English Teacher. Her entire teaching career was served at Hamden Public Schools with experience at both elementary and secondary levels. Elizabeth earned her Bachelor’s Degree in English from University of Connecticut, her Master’s Degree in English from Southern CT. State University and her 6th Year Certificate in Educational Leadership from Southern CT. State University.

Damian Stratton – F/T Technology Education Teacher – Damian brings to Amity an extensive amount of teaching experience in the field of Technology Education. He comes to us with over 24 years at the middle school level in the Hamden Public School District. Damian holds a Bachelor’s Degree and a Master’s Degree, both in Technology Education and both from Central Connecticut State University.

Ashley Griffin – F/T Spanish Language Teacher – Ashley joins the Amity Orange team bringing 4 years of teaching experience. She is an Amity alum and returns home to Connecticut from Brookline, Massachusetts where she taught middle school Spanish. Ashley holds a Bachelor’s Degree in Psychology from Northeastern University in Massachusetts.

NEW HIRES-BENCH/LONG TERM SUBSTITUTES: NONE

NEW HIRES-NON-CERTIFIED: NONE

NEW HIRES-COACHES:

Tyshawn Cannon – Asst. Boys Soccer Coach - 2022 Fall Season – Amity Regional High School

TRANSFERS:

Lawrence (Ken) Clark– FT English Teacher at Amity Regional High School to the position of Library Media Specialist at Amity Regional High School, effective 2022-2023 school year.

RESIGNATIONS:

Phil Dolan – Adult Education Director, eff. 07/29/2022

Tyshawn Cannon – Boys Soccer Coach ~ Amity Middle School - Bethany, eff. 07/28/2022

Stephanie Esposito – Field Hockey Coach ~ Amity Middle School - Orange, eff. 08/03/2022

RETIREMENTS: NONE

AMITY REGIONAL SCHOOL DISTRICT NO. 5
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Dr. Jennifer P. Byars
Superintendent of Schools

jennifer.byars@amityregion5.org
203.392.2106

Superintendent's Report – August 2022

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

Excited for the Start of School: We are preparing for and excited for the start of school. The entire administrative team is meeting on August 15 – 16, 2022 to prepare for the opening of school. We will welcome new teachers and staff on August 17 – 18, 2022. All teachers and staff return for opening preparations, professional learning, and convocation August 23 – 25, 2022. And students return August 29th! **August 29th and 30th are early release days for students.**

Welcome to our New Students: AMSO is looking forward to welcoming 330 students back to school for the 2022-2023 school year. Student schedules will go out by August 12, 2022.

Link Crew News: The Link Crew Freshman Orientation Program will be held for all incoming 9th graders on Friday, August 26, 2022. The Link Crew Parent Night for the parents of incoming 9th grade students will be held on Tuesday, August 23, 2022. Link Crew advisors Anastasia Kimball, Marian Boyns, Scott DeMeo, Wendy Carrafiello, and Jeni Bonaldo were interviewed by WFSB regarding how parents can help their children with the transition to high school for WFSB's annual "Back to School Authority" feature.

Laptop Distribution and Party: The AMSB staff will welcome our 7th graders on August 24th for a laptop exchange and social gathering sponsored by Woodbridge Youth Services. Refreshments will be served and a DJ will provide the entertainment as the students meet for the first time as Amity students. The event starts at 5:30 for parents and students who would like to take a tour of the building and find their classes!!

Extended School Year 2022 is a Wrap: From July 5 – 29, 2022, Amity provided Extended School Year (ESY) services to nearly 65 students. A special thank you to all the staff who worked tirelessly to make ESY a success. For identified incoming seventh grade students, this was their first experience in Amity and the staff went above and beyond to make the entire experience a positive one. We would be remiss if we did not thank B & B and Tirollo Transportation for all their hard work in ensuring timely and accurate transportation of our students. In conjunction with a one-time grant from the Connecticut State Department of Education related to the impact of COVID-19, ARSD offered target support to students identified with dyslexia throughout the month of July and the beginning of August. Thank you to Dr. Tolis from Fairfield University for coordinating this offering.

ARHS Building Leadership Team Summer Meetings: The ARHS BLT met in late July to map out initial plans for the coming school year, and they will be meeting again on August 18th for further planning for the start of the school year.

Resources

New Partnership with Connecticut Behavioral Health: The Pupil Services and Counseling Departments are excited to announce a new partnership with Connecticut Behavioral Health. Through this partnership, Amity Regional School District will have a mental health clinician in each building at least one day per week. This will allow students and their families the ability to access clinical level mental health services without needing to leave the school building. Additional information will be shared in the near future.

Thanks to the Custodial and Maintenance Staff: Thank you to our custodial and maintenance staff for all of their hard work and preparation in getting both buildings and grounds ready for the 2022-2023 school year. Your hard work is noticed!

Building Condition: The halls of AMSB are shining and ready for the 2022-2023 school year to start. Our custodial staff has worked tirelessly to ensure that the building is ready for our students and staff. The summer projects on campus, including a renovation to the courtyard patio and a renovation to our portable classroom are coming along beautifully. Thank you to our AMSB crew!

PPS Director Receives State and National Recognition: Pupil Personnel Services Director, Mr. Tom Brant, was recently appointed to the Legislative Committee for the Connecticut Council of Special Education Administrator (ConnCase). Mr. Brant currently serves as the related services liaison to the Executive Board of ConnCase. Through a comprehensive application and interview process, Mr. Brant was selected to be a member of the NASP School Safety and Crisis Response Committee. This committee's functions include preventative and response crisis mitigation activities. More information can be found [here](#). Mr. Brant currently serves as delegate from the State of Connecticut to the NASP Leadership Assembly.

Orange Education Articulation: The AMSO administrators will be meeting with the Orange elementary principals on August 18, 2022 to discuss the plans for the upcoming school year. Further meetings are being planned to improve communication and articulation between the two districts.

Climate

Meet the Principal: ARHS hosted "Meet the Principal" open house sessions for students and parents on August 10th and 11th, providing an informal opportunity to meet and welcome Mr. Andre Hauser prior to the start of the school year.

NASP PREPaRE Training: Administrators, School Counselors, School Psychologists, School Social Workers, and School Nurses participated in the NASP PREPaRE Training presented by Dr. Melissa Reeves. This professional learning is an essential component in school safety and crisis preparedness. Additionally, staff participated in a full day training with Dr. Reeves on advanced threat assessment techniques. This training further equipped staff to respond to individual and school level crisis situations. We are grateful for our three days with Dr. Reeves.

AMSO Grade 7 Open House: AMSO will have an open house for 7th grade students on August 16, 2022 from 5:30-7:30pm. Students and parents will tour the building with their class schedules and practice opening lockers. A parent information session to introduce the middle school model will be presented in the gymnasium. To round out the evening, Orange Youth Services has sponsored a food truck to provide snacks and welcome the students back to school.

Back to School Night: AMSB will hold our annual Back to School Night on September 15th at 6:00. This event is always well attended and is a wonderful way to welcome the new school year.

Hello & Goodbye: Congratulations and farewell to former ARHS Principal Anna Mahon, whose last day at ARHS was Friday, July 29, 2022. Welcome to Mr. Andre Hauser, ARHS Principal and Mr. Frank Purcaro, Assistant Superintendent – both started their time in Amity during the month of July.

PORTRAIT OF THE GRADUATE

The BOWA Portrait of the Graduate illustrates a respectful, self aware citizen who, through a determined course of scholastic experiences, displays the following characteristics...

COLLABORATOR

A collaborator is a learner who is an active contributor and works inclusively with others toward a goal while being aware of their unique impact on the world and the world's impact on them.



COMMUNICATOR

A communicator is a learner who is able to clearly, confidently and effectively read, write, speak and listen across various formats and contexts.



EMPATHIZER

An empathizer is a learner who continuously grows their capacity to understand multiple perspectives.



PLANNER

A planner is a learner who is able to independently balance demands, responsibilities, and priorities to fulfill their goals, obligations, and aspirations.



PROBLEM SOLVER

A problem solver is a learner who accepts challenges with curiosity, passion, and creativity while thinking critically to arrive at a variety of possible solutions.



COLLABORATOR

- Recognizes themselves as a steward of a greater community
- Listens openly to various perspectives
- Advocates respectfully for one's own ideas
- Establishes meaningful connections with others
- Takes responsibility for authentic contributions

EMPATHIZER

- Acknowledges and affirms the feelings of self and others
- Connects and understands their own thoughts, needs, and perspectives as well as those of others
- Respects differences and demonstrates humility
- Demonstrates compassion through helping and supporting others

PROBLEM SOLVER

- Observes and asks questions willingly
- Analyzes and synthesizes information from multiple sources
- Perseveres through adversity
- Acknowledges limitations and seeks helpful resources
- Views challenges as opportunities for growth

PLANNER

- Manages time
- Engages in reflection for individual improvement
- Prepares for responsible personal financial decision making
- Makes choices that promote personal wellness, joy, and contentment

COMMUNICATOR

- Takes an active role when listening and in expressing thoughts and opinions
- Takes risks to have difficult and courageous conversations to communicate divergent perspectives
- Engages and empowers others
- Understands their audience and adjusts the message



Amity Regional School District No. 5

2022-2023 District Calendar



Approved V5 05.09.2022

Date	Event or Holiday
August 23	Prof. Dev. - Teachers Only
August 24	Prof. Dev. - Teachers Only
August 25	Prof. Dev. - Teachers Only
August 29	First Day of School - Students <i>Early Dismissal</i>
August 30	Students <i>Early Dismissal</i>
September 5	Labor Day - No School
September 8	Back to School Night - ARHS - Grades 9&12
September 13	Back to School Night - Middle Schools
September 15	Back to School Night - ARHS - Grades 10&11
September 22	Early Dismissal - Professional Development
September 26	Rosh Hashana - No School
October 5	Yom Kippur - No School
October 10	Columbus/Indigenous Peoples Day - No School
October 13	Early Dismissal - Professional Development
November 8	Prof. Dev. - Teachers Only
November 9	Parent Conferences - Middle Schools
November 10	Parent Conferences - High School
November 16	Parent Conferences - High School
November 17	Parent Conferences - Middle Schools
November 23	Early Dismissal
November 24, 25	Thanksgiving - No School
December 7	Parent Conferences - MS/HS - <i>Early Dismissal</i>
December 8	Early Dismissal - Professional Development
December 23	Early Dismissal
Dec 26-Jan 2	Holiday Recess - Christmas Eve (Obs. 12/26/22); Christmas Day (Obs. 12/27/22); New Year's Day (Obs. 1/2/23)
January 5	Early Dismissal - Professional Development
January 16	Martin Luther King, Jr. Day - No School
February 8	Parent Conferences - Middle Schools
February 9	Early Dismissal - Professional Development
February 15	Parent Conferences - High School
February 16	Parent Conferences - Middle Schools
February 20, 21	Winter Recess
March 16	Early Dismissal - Professional Development
April 7 - April 14	Spring Recess
April 27	Early Dismissal - Professional Development
May 29	Memorial Day - No School
June 8	Last Day of School - Students

August 2022 (3/3)

S	M	T	W	R	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

September 2022 (20/23)

S	M	T	W	R	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

October 2022 (19/42)

S	M	T	W	R	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

November 2022 (19/61)

S	M	T	W	R	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

December 2022 (17/78)

S	M	T	W	R	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

January 2023 (21/99)

S	M	T	W	R	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

February 2023 (18/117)

S	M	T	W	R	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28				

March 2023 (23/140)

S	M	T	W	R	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

April 2023 (14/154)

S	M	T	W	R	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

May 2023 (22/176)

S	M	T	W	R	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

June 2023 (5/181)

S	M	T	W	R	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

July 2023 (0)

S	M	T	W	R	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

If emergency closings extend beyond June 30, 2023, any additional days will be taken from Spring 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

2022-2023

CLEAN

SAFE

HEALTHY

SCHOOLS

Amity Regional School
District No. 5

25 Newton Road

Woodbridge, CT 06525

Phone: 203-397-4817

Fax: 203-397-4864



Amity Regional School District No. 5

Facilities Department Monthly Report

Completed Projects:

- Parking lot paving and repairs were completed District-wide.
- The front parking lot at ARHS was relined and renumbered.
- Additional insulation repairs on the heating/cooling piping at AMSO were completed. Repairs are needed during the cooling season, so the pipes do not sweat.
- The courtyard at AMSB was redone over the summer.
- A new fence was installed alongside the culvert by the football field at ARHS.
- The art tables at AMSB were sanded down and refinished by our in-house maintainer.
- A new dishwasher for the ARHS cafeteria was installed. Hobart installed the new machine and removed the old machine. Our in-house building electrician took care of the electrical disconnection of the old machine and rewiring of the new machine.
- Two circulator pumps in the boiler room at ARHS were rebuilt by our vendor. Both pumps were removed and reinstalled by our in-house maintainer and in-house electrician.
- Numerous roof repairs were done District-wide mainly addressing ongoing leaks at ARHS, as well as a few spot repairs at the AMSB and AMSO main roofs.
- Two access ladders were installed at AMSB and AMSO to gain access to the upper gym roofs.
- All kitchen equipment preventative maintenance work was completed District-wide.
- Preventative maintenance work was done on all HVAC units (filters changed, belts inspected, cabinets cleaned).
- The supply fan motor on air handler 26 at ARHS failed; the motor was replaced by a spare we had in stock. The failed motor was sent out to be rebuilt.
- A new rubber floor was installed by our in-house maintainer and electrician in the fitness room at AMSO.

Projects in Process:

- Repairs for the AMSB modular building have started.
- Bid specifications are being developed for remodeling the ARHS lecture hall.
- The DESIGO building management system software upgrade for ARHS is wrapping up.
- The outdoor classroom project for both AMSB and AMSO will start soon. Drawings have been approved, and planning for site work has begun.
- The District Office remodel is progressing. The wall panels have been ordered, carpet for the new copy center is scheduled for install, lighting modifications have been completed, and sprinkler and fire protection work is scheduled.

CLEAN

SAFE

HEALTHY

SCHOOLS

Amity Regional School District No. 5

Facilities Department Monthly Report

Projects in Process:

- Fencing repairs to the tennis court at ARHS will be completed once material arrives as well as a new wood security fence alongside District Office.
- An in-line filter system on the glycol loop is being installed as well as a clean and flush of the glycol loop at AMSO.

Outstanding issues to be addressed:

Work is scheduled to begin on the track at ARHS within the week and should be completed in three weeks including painting.

Amity Regional School
District No. 5

25 Newton Road

Woodbridge, CT 06525

Phone: 203-397-4817

Fax: 203-397-4864



2023-2024 ABBREVIATED BUDGET CALENDAR

Highlights important AFC and BOE Dates

August

- **AUGUST 15, 2022:** At the Amity Finance Committee and Board of Education Meetings:
 - ✓ Director of Finance and Administration presents the fiscal year-end financial report.
 - ✓ Superintendent discusses appropriation to Capital Reserve from the 2021-2022 fund balance.
 - ✓ Superintendent presents the preliminary budget calendar.
 - ✓ Amity Finance Committee and the Board of Education vote on appropriating up to 2% of prior year fund balance.

October

- **OCTOBER 1, 2022 A.D.M.** Average Daily Membership (ADM) as of October 1 is calculated according to statutory guidelines. The ADM is used to allocate each town's share of the subsequent year's budget.

November

- **November 28, 2022 – Directors of Athletics, Facilities, Technology, Pupil Services, School Principals, and Assistant Superintendent make budget presentations to the Board at a special Board Meeting.**

December

- **DECEMBER 1, 2022:** Director of Technology submits updated enrollment data to New England School Development Council (NESDEC) for the purpose of obtaining revised enrollment projections.
- **DECEMBER 12, 2022:** At the Amity Finance Committee and Amity Board of Education meetings, Superintendent presents preliminary budget information, including, major budget drivers, Federal and State unfunded and underfunded mandates and related costs, and potential budget balancers.
- **DECEMBER 13, 2022:** The Facilities Committee reviews and discusses the preliminary Facilities Five-Year Capital Improvement Plan.

January

- **JANUARY 6, 2023:** Superintendent distributes the proposed 2023-2024 Budget to the Amity Board of Education, Amity Finance Committee, First Selectmen, and Boards of Finance.

- **JANUARY 9, 2023:** Superintendent presents the proposed 2023-2024 Budget to the Amity Finance Committee.
- **JANUARY 9, 2023:** The Curriculum Committee reviews and discusses the 5 Year Textbook Forecast Plan, new programs and enhancements, and staffing.
- **JANUARY 23 AND 30, 2023:** Amity Finance Committee meets to consider revisions to the Superintendent's proposed 2023-2024 budget. Additional workshops will be held, if necessary.
- **JANUARY - FEBRUARY 2023 T.B.D:** Superintendent meets with each of the Member Towns Boards of Finance to have an open dialog on the 2023-2024 budget.

February

- **FEBRUARY 13, 2023:** Superintendent presents the proposed 2023-2024 Budget, as amended by the Amity Finance Committee, to the Amity Board of Education. The Amity Board of Education will begin deliberation of the proposed 2023-2024 budget.
- **T.B.D.:** The Amity Board of Education will set as many budget workshops as they deem appropriate.
- **FEBRUARY 17, 2023:** Superintendent distributes the revised 2023-2024 budget to the Amity Board of Education, Amity Finance Committee, First Selectmen, and Boards of Finance. The revisions will be based on the feedback from the Amity Board of Education.

March

- **By MARCH 1, 2023:** Amity Finance Committee meets to discuss the Superintendent's Proposed 2023-2024 Budget, make any desired changes, and vote to send the proposed 2023-2024 budget to the Amity Board of Education for their consideration. (if necessary)
- **MARCH 13, 2023:**
 - Amity Finance Committee will consider if the budget vote should be at the Annual Public Budget Meeting or by Referendum on the next day. A recommendation will be made to the Amity Board of Education.
 - Amity Board of Education meets to discuss the proposed 2023-2024 budget, make any desired changes, and vote to send the proposed 2023-2024 budget to the Public.
 - Amity Board of Education will decide if the budget vote should take place at the Annual Public Budget Meeting or by Referendum on the next day.

April

- **APRIL 3, 2023:**
 - Public District Budget Hearing is held.

- Amity Finance Committee and Amity Board of Education vote on the budget to send to the Public for a vote.

May

- **MAY 1, 2023 (MONDAY)**: Annual Public Budget Meeting is held.
- **MAY 2, 2023 (TUESDAY)**: Referendum is held unless vote takes place at Annual Public Budget Meeting.

Note: The Amity Board of Education will decide if the budget vote should take place at the Annual Public Budget Meeting or by Referendum on the next day.

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, Superintendent of Schools
From: Theresa Lumas, Director of Finance and Administration
Re: Reserve Fund for Capital and Nonrecurring Expenditures
Date: August 4, 2022

Connecticut General Statutes Sec. 10-51(d) establishes the authority of a regional board of education to create a reserve fund to finance specific capital improvement or acquisition of any specific piece of equipment. It also states, 'The board shall annually submit a complete and detailed report on the condition of such fund to the member towns'. In compliance with this requirement, the report is attached.

Enclosure

**Reserve Fund for Capital and Nonrecurring Expenditures
Fiscal Year Ended June 30, 2022**

Net Balance as of June 30, 2021	\$ 5,289,175.72
Plus: 2021-2022 Appropriations & Rebates & Bonds:	\$ 507,844.00
Subtotal	\$ 5,797,019.72
Less: 2021-2022 Expenditures & Encumbrances:	
Sav-Mor 2020 Bond AHU Replacements - AHS	\$ (1,185,491.00)
VanZelm Engineering 2020 Bond AHU Replacements - AHS	\$ (7,276.54)
Moble Air Power 2020 Bond AHU Replacements - AHS	\$ (14,099.37)
Siemens Industry 2020 Bond AHU Replacements - AHS	\$ (12,716.33)
FieldTurf Athletic Facilities Project AHS	\$ (1,390,189.08)
Ciola Excavation LLC Athletic Facilites Project AHS	\$ (7,000.00)
Cisco, LLC Athletic Facilites Project AHS	\$ (4,160.00)
H & L Paving Paving AHS	\$ (236,739.00)
Connecticut SealCoat Service Paving AHS	\$ (9,443.50)
Cote Acoustical Consultants Acoustical Improvements	\$ (3,700.00)
J & J Acoustics Improvements	\$ (66,760.00)
Weatherproofing Tech Roof Replacement	\$ (80,161.68)
NCA-Northeast Collab Services-Architectual	\$ (8,500.00)
Bond Interest Payment	\$ (580,483.00)
Subtotal	\$ (3,606,719.50)
Net Balance as of June 30, 2022	\$ 2,190,300.22
Net Balance by Project:	
Security & safety equipment	\$ 524.10
Athletic Facilities Project	\$ 58,289.85
2020 Bond AHU Replacements - AHS	\$ 95,896.50
Chillers Refurbish AHS	\$ 3,178.00
Paving AHS	\$ 36,662.70
Acoustical Improvements	\$ 172,390.00
Bond Contingency	\$ 198,024.88
Roof Replacement	\$ 406,570.32
Lecture Hall Renovations	\$ 233,900.00
Lighting Project	\$ 100,000.00
Undesignated	\$ 498,031.32
Bond Premium designated for Debt Service	\$ 386,832.55
Capitla Reserve Transfer from Budget	
	\$ 2,190,300.22

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



To: Jennifer P. Byars, Superintendent of Schools

From: Theresa Lumas, Director of Finance & Administration

Date: August 4, 2022

Re: Request to Appropriate funds to the Capital and Nonrecurring Account

The Administration proposes that 2% of the operating budget be appropriated to the Capital and Nonrecurring Account. The annual limit of appropriation increased in the June 2021 legislative session to align regional school districts with town boards of education.

I am recommending the Amity Finance Committee and Board of Education approve the following appropriation and budget transfer of 2% or **\$1,033,963** into Reserve Fund for Capital and Nonrecurring Expenses from the fiscal year 2021-2022. The state statute does not require designation at the time of appropriation but there are items that the Board may want to designate. Setting aside these funds when available can keep future budget requests lower and avoid borrowing costs for projects.

ITEM	ESTIMATED COST
Musical Instruments	\$190,075
AMSO Roof renovation/gutters/exterior gym wall	\$382,000
AMSB Roof renovation/gutters/exterior gym wall	\$331,500
Security Cameras	\$ 90,000
Patio at high school	\$ 30,000
Replace exterior door frame at gym entrance	\$ 40,000
Burnisher –Floor polisher	\$ 24,219
Chilled Water Lines	\$ 90,000
Replace gas lines in science labs	\$ 24,000
Field replacement planning	\$ 70,000
TOTAL	\$1,271,794 - 1,033,963 = \$237,831

The remaining funds from the fiscal year, \$523,678 will be carried over into the FY23 budget as a revenue surplus to be applied to the FY24 budget.

Amity Finance Committee:

Move to recommend the Amity Board of Education approve –

Amity Board of Education:

Move to approve –

... an appropriation and budget transfer of \$1,033,963 into Reserve Fund for Capital and Nonrecurring Expenses from the fiscal year 2021-2022 surplus.

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
XX-XX-XXXX	Various expenses accounts	\$1,033,963	
05-15-0000-5856	Transfer Account/Undesignated		\$1,033,963

We have two projects that need designation of appropriated funds. The music instruments for the middle schools and additional architectural work for the lecture hall.

The music instruments are replacing instruments that are almost 50 years old. There is a contract approval in the packet this month for \$190,075.

The lecture hall design remodel is ready to move to the next phase of architectural drawings, bid specifications, construction documents and administration. Northeast Collaborative has quoted a price of \$25,600.

Amity Finance Committee:

Move to recommend the Amity Board of Education approve –

Amity Board of Education:

Move to approve –

... designation of funds for music instruments for the middle school, architectural services for the lecture hall, and the roof projects at each middle school.

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
00-15-0099-5899	Undesignated	\$929,175	
00-15-0061-5731	Music Equipment-Replacement		\$190,075
00-15-0055-5715	Lecture Hall		\$ 25,600
00-15-0062-5715	Roof Project- AMSB		\$331,500
00-15-0063-5715	Roof Project-AMSO		\$382,000

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: Dr. Jennifer Byars, Superintendent of Schools

From: Theresa Lumas, Director of Finance and Administration

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

Date: August 5, 2022

Music Instruments for AMSB and AMSO:

The District obtained pricing for music instruments from Conn-Selmer. Conn-Selmer is the leading manufacturer and distributor of musical instruments for student, amateur, and professional use. The local dealer in our area is Goldie-Libro, who in conjunction with Conn-Selmer has provided educational pricing for the instruments for both middle schools. Conn-Selmer manufactures the instruments domestically and currently there is not a supply chain issue. This manufacturer provides many support services along with the purchase of the instruments. It is the brand preferred by the staff. The current instruments have had a long life span and we expect to have similar experience with this investment. Included in the price is over \$8,000 of online support of 7 Music Educator Master Classes and 350 Music Professor Student Licenses plus minor adjustments and regulations on all the instruments. I did research consortium pricing and received one quote from a supplier in Maryland who could not supply all the items. The items quoted were comparable to the recommended vendor. The Maryland vendor was \$5,000 less for the available items but did not offer the add-ons. A full list of instruments is provided in the attached list.

Pending appropriation of the end of year surplus to the capital nonrecurring account, this contract can be supported by capital nonrecurring funds.

Amity Finance Committee:

Move to recommend the Amity Board of Education...

Amity Board of Education:

Move to ...

Approve the purchase of music instruments for the middle schools from Goldie-Libro/Conn-Selmer at a price of \$190,075 and waive the bid process.

Music Instrument List

Item #	Qty	Description	MSRP	MSRP Ext
204	8	ARM PICC - ALL SP	\$1,424.89	\$11,399.11
122F	2	SELMERUSA OBOE WOOD MOD CON	\$5,047.13	\$10,094.25
1430LP	4	SELMERUSA BASS COMP	\$3,618.67	\$14,474.69
1432B	4	SELMERUSA BASSOON COMP	\$8,232.03	\$32,928.13
TS600	8	SELMER TENOR SAX OFT NP	\$3,741.08	\$29,928.62
BS400	4	SELMER 400 SERIES BARI SAX OFT	\$8,914.17	\$35,656.69
14D	6	Conn Single French Horn Outfit	\$3,564.01	\$21,384.03
TB301	4	BACH TROMBONE OUTFIT	\$1,662.57	\$6,650.28
627	6	King Baritone Outfit	\$3,773.16	\$22,638.98
BB450	4	HOLTON COLLEGIATE TUBA OFT 3/4	\$6,297.32	\$25,189.28
2350W	4	King Sousaphone Outfit	\$12,033.72	\$48,134.87
LM404C	10	5X14 ACROLITE CLASSIC SNARE	\$784.34	\$7,843.43
M32	2	4 OCTAVE STUDIO MARIMBA	\$5,903.96	\$11,807.92
M44	2	Combo Vibe 442 Tun	\$6,048.95	\$12,097.89
M51	1	Portable Kelon Xylophone	\$4,837.97	\$4,837.97
M635B	2	Classic Chimes 1 1/4 Satin Brs	\$7,892.15	\$15,784.30
M646	2	ORCHESTRA BELLS W/DAMPER	\$3,151.63	\$6,303.26

Music Instrument List

Item #	Qty	Description	MSRP	MSRP Ext
LTS404PG	1	4 PC STANDARD TIMP-COPPER W/G	\$25,362.79	\$25,362.79
LKS423PG	1	23" STANDARD TIMP-COPPER W/G	\$5,951.50	\$5,951.50
1127	4	King Marching Baritone Outfit	\$3,875.37	\$15,501.46
LUMS14PB	4	12X14 ULTIMATE SNARE, BLACK	\$1,183.64	\$4,734.58
LECB32M8G	1	16X32 CONCERT BASS MTD FOR 788	\$1,837.26	\$1,837.26
LE788	1	CONCERT BASS DRUM STAND	\$1,322.69	\$1,322.69

\$371,864.00

**AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES AND EXPENDITURES
FOR FY 2021-2022**

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2020-2021	2021-2022	MAY 22	CHANGE	EOY 22	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	1	50,495,238	1	FAV
2	OTHER REVENUE	155,137	136,871	128,283	2,229	130,512	(6,359)	UNF
3	OTHER STATE GRANTS	1,081,353	1,025,301	843,114	0	843,114	(182,187)	UNF
4	MISCELLANEOUS INCOME	23,374	40,798	45,269	540	45,809	5,011	FAV
5	BUILDING RENOVATION GRANTS	0	0	0	0	0	0	FAV
6	TOTAL REVENUES	51,020,653	51,698,207	51,511,903	2,770	51,514,673	(183,534)	UNF
7	SALARIES	26,973,879	28,036,821	27,522,431	(92,515)	27,429,916	(606,905)	FAV
8	BENEFITS	4,801,671	5,597,784	5,498,223	(33,278)	5,464,945	(132,839)	FAV
9	PURCHASED SERVICES	8,483,699	9,758,800	9,224,871	(368,426)	8,856,445	(902,355)	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	3,268,426	(108,786)	3,159,640	(58,432)	FAV
12	EQUIPMENT	320,427	54,348	115,567	14,574	130,141	75,793	UNF
13	IMPROVEMENTS / CONTINGENCY	331,379	404,500	349,500	(9,357)	340,143	(64,357)	FAV
14	DUES AND FEES	80,852	174,047	125,495	(3,528)	121,967	(52,080)	FAV
15	TRANSFER ACCOUNT	507,844	0	516,981	516,982	1,033,963	1,033,963	UNF
16	TOTAL EXPENDITURES	48,536,905	51,698,207	51,075,328	(84,334)	50,990,995	(707,212)	FAV
17	SUBTOTAL	2,483,748	0	436,575	87,104	523,678	523,678	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	436,575	87,104	523,678	523,678	FAV

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

**AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES AND EXPENDITURES
FOR FY 2021-2022**

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2020-2021	2021-2022	MAY 22	CHANGE	EOY 22	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	1	8,983,609	1	FAV
2	ORANGE ALLOCATION	25,003,802	25,236,005	25,236,005	0	25,236,005	0	FAV
3	WOODBIDGE 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	1	50,495,238	1	FAV
5	ADULT EDUCATION	4,286	3,042	4,341	0	4,341	1,299	FAV
6	PARKING INCOME	25,045	32,000	30,892	254	31,146	(854)	UNF
7	INVESTMENT INCOME	3,338	7,500	3,000	1,975	4,975	(2,525)	UNF
8	ATHLETICS	0	25,000	26,516	0	26,516	1,516	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	128,283	2,229	130,512	(6,359)	UNF
13	OTHER STATE GRANT	0	0	0	0	0	0	FAV
14	SPECIAL EDUCATION GRANTS	1,081,353	1,025,301	843,114	0	843,114	(182,187)	UNF
15	OTHER STATE GRANTS	1,081,353	1,025,301	843,114	0	843,114	(182,187)	UNF
16	RENTAL INCOME	25	18,000	22,618	540	23,158	5,158	FAV
17	INTERGOVERNMENTAL REVENUE	4,797	4,798	4,893	0	4,893	95	FAV
18	OTHER REVENUE	18,552	18,000	17,758	0	17,758	(242)	UNF
19	TRANSFER IN	0	0	0	0	0	0	FAV
20	MISCELLANEOUS INCOME	23,374	40,798	45,269	540	45,809	5,011	FAV
21	BUILDING RENOVATION GRANTS	0	0	0	0	0	0	FAV
22	TOTAL REVENUES	51,020,653	51,698,207	51,511,903	2,770	51,514,673	(183,534)	UNF

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

**AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES AND EXPENDITURES
FOR FY 2021-2022**

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2020-2021	2021-2022	MAY 22	CHANGE	EOY 22	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./ (DECR.)	FORECAST	OVER/ (UNDER)	UNF
1	5111-CERTIFIED SALARIES	22,041,070	22,915,344	22,518,605	(62,481)	22,456,124	(459,220)	FAV
2	5112-CLASSIFIED SALARIES	4,932,809	5,121,477	5,003,826	(30,034)	4,973,792	(147,685)	FAV
3	SALARIES	26,973,879	28,036,821	27,522,431	(92,515)	27,429,916	(606,905)	FAV
4	5200-MEDICARE - ER	369,840	407,811	382,811	(979)	381,832	(25,979)	FAV
5	5210-FICA - ER	300,649	311,405	300,265	1,623	301,888	(9,517)	FAV
6	5220-WORKERS' COMPENSATION	205,308	214,297	152,164	201	152,365	(61,932)	FAV
7	5255-MEDICAL & DENTAL INSURANCE	2,913,911	3,675,704	3,675,704	(27,846)	3,647,858	(27,846)	FAV
8	5860-OPEB TRUST	31,678	0	0	0	0	0	FAV
9	5260-LIFE INSURANCE	44,550	49,918	48,608	(2,190)	46,418	(3,500)	FAV
10	5275-DISABILITY INSURANCE	10,765	11,136	11,898	(1,161)	10,736	(400)	FAV
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	(2,922)	145,496	(2,922)	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	(2)	12,498	(2)	FAV
16	5291-CLOTHING ALLOWANCE	1,388	2,200	1,460	(1)	1,459	(741)	FAV
17	BENEFITS	4,801,671	5,597,784	5,498,223	(33,278)	5,464,945	(132,839)	FAV
18	5322-INSTRUCTIONAL PROG IMPROVEMENT	37,973	26,600	26,600	1,559	28,159	1,559	UNF
19	5327-DATA PROCESSING	99,936	114,785	114,785	(9,763)	105,022	(9,763)	FAV
20	5330-PROFESSIONAL & TECHNICAL SRVC	1,657,059	1,749,530	1,905,725	(52,632)	1,853,093	103,563	UNF
21	5440-RENTALS - LAND, BLDG, EQUIPMENT	99,809	122,685	98,589	(16,441)	82,148	(40,537)	FAV
22	5510-PUPIL TRANSPORTATION	2,874,413	3,655,436	3,539,964	(98,576)	3,441,388	(214,048)	FAV
23	5521-GENERAL LIABILITY INSURANCE	255,503	249,650	266,254	16,535	282,789	33,139	UNF
24	5550-COMMUNICATIONS: TEL, POST, ETC.	88,161	114,356	106,147	11,551	117,698	3,342	UNF
25	5560-TUITION EXPENSE	3,206,118	3,638,655	3,084,704	(216,993)	2,867,711	(770,944)	FAV
26	5590-OTHER PURCHASED SERVICES	164,727	87,103	82,103	(3,666)	78,437	(8,666)	FAV
27	PURCHASED SERVICES	8,483,699	9,758,800	9,224,871	(368,426)	8,856,445	(902,355)	FAV

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

**AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES AND EXPENDITURES
FOR FY 2021-2022**

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2020-2021	2021-2022	MAY 22	CHANGE	EOY 22	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	625,803	(36,920)	588,883	(136,182)	FAV
32	5420-REPAIRS, MAINTENANCE & CLEANING	764,059	747,751	958,107	(15,088)	943,019	195,268	UNF
33	5611-INSTRUCTIONAL SUPPLIES	244,344	369,883	334,883	(6,042)	328,841	(41,042)	FAV
34	5613-MAINTENANCE/CUSTODIAL SUPPLIES	159,130	246,698	224,558	(34,942)	189,616	(57,082)	FAV
35	5620-OIL USED FOR HEATING	49,787	42,500	42,500	(2,198)	40,302	(2,198)	FAV
36	5621-NATURAL GAS	41,929	68,171	74,571	(1,177)	73,394	5,223	UNF
37	5627-TRANSPORTATION SUPPLIES	93,802	122,016	122,016	(19,664)	102,352	(19,664)	FAV
38	5641-TEXTS & DIGITAL RESOURCES	68,322	243,902	243,902	(5,988)	237,914	(5,988)	FAV
39	5642-LIBRARY BOOKS & PERIODICALS	19,390	20,215	20,215	637	20,852	637	UNF
40	5690-OTHER SUPPLIES	525,805	631,871	621,871	12,596	634,467	2,596	UNF
41	SUPPLIES (INCLUDING UTILITIES)	2,583,319	3,218,072	3,268,426	(108,786)	3,159,640	(58,432)	FAV
42	5730-EQUIPMENT - NEW	182,811	49,348	91,485	968	92,453	43,105	UNF
43	5731-EQUIPMENT - REPLACEMENT	137,616	5,000	24,082	13,606	37,688	32,688	UNF
44	EQUIPMENT	320,427	54,348	115,567	14,574	130,141	75,793	UNF
45	5715-IMPROVEMENTS TO BUILDING	326,379	65,000	65,000	2,775	67,775	2,775	UNF
45a	5715-FACILITIES CONTINGENCY	100,000	100,000	100,000	0	100,000	0	FAV
45b	TRSF. FROM FACILITIES CONTINGENCY	(100,000)	0	(100,000)	0	(100,000)	(100,000)	FAV
46	5720-IMPROVEMENTS TO SITES	5,000	89,500	284,500	(12,132)	272,368	182,868	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	(150,000)	0	(150,000)	(150,000)	FAV
48	IMPROVEMENTS / CONTINGENCY	331,379	404,500	349,500	(9,357)	340,143	(64,357)	FAV
49	5580-STAFF TRAVEL	3,135	23,850	11,006	(2,805)	8,201	(15,649)	FAV
50	5581-TRAVEL - CONFERENCES	14,472	44,800	30,000	2,992	32,992	(11,808)	FAV
51	5810-DUES & FEES	63,245	105,397	84,489	(3,715)	80,774	(24,623)	FAV
52	DUES AND FEES	80,852	174,047	125,495	(3,528)	121,967	(52,080)	FAV
53	5856-TRANSFER ACCOUNT	<i>507,844</i>	0	516,981	516,982	1,033,963	1,033,963	UNF
54	ESTIMATED UNSPENT BUDGETS		0	0	0	0	0	FAV
55	TOTAL EXPENDITURES	48,536,905	51,698,207	51,075,328	(84,334)	50,990,995	(707,212)	FAV

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

**AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES & EXPENDITURES BY CATEGORY
FINANCIAL ANALYSIS
FOR THE FISCAL YEAR 2021-2022**



EOY 2022

2021-2022 FORECAST

OVERVIEW

The unaudited unspent fund balance for this fiscal year is \$523,678 FAV previously, \$348,174 FAV, which appears on the Excel report page 1, column 6, and line 20. This surplus from prior year is carried over into the FY23 budget as a revenue surplus to be applied to the FY24 budget. The transfer amount now reflects \$1,033,963, previously, \$516,981 of a possible 2% of the surplus as an end-of-year transfer. The \$1,033,963 appropriation to the capital and non-recurring account is shown on line 53 of the Excel file. The District is legally allowed to transfer with Board approval up to 2% or \$1,033,963 of the current budget. The item will be presented after the final balance for FY22 is confirmed at the August 2022 meeting.

REVENUES BY CATEGORY

The projected yearend balance of revenues is *\$183,534 UNF, previously, \$186,304 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. *The actual payment is \$1,299 FAV, previously \$1,299.*

LINE 6 on Page 2: PARKING INCOME:

The forecast is *\$854 UNF, previously \$1,108 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, \$2,525 UNF, previously \$4,500 UNF.

<u>Month</u>	<u>Peoples United</u>	<u>State Treasurer's Investment Fund</u>
July 2021	.398%	.10%
August	.398%	.10%
September	.398%	.09%
October	.398%	.09%
November	.398%	.09%
December	.398%	.09%
January	.398%	.10%
February	.398%	.12%
March	.397%	.12%
April	.397%	.26%

May	.396%	.26%
June	.396%	1.21%

LINE 8 on Page 2: ATHLETICS:

The forecast is based on actual which is slightly *FAV \$1,516*.

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:

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 1st. 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 \$120,602 UNF, previously, \$148,478 UNF based on current student placements. *The total for this line is \$182,187 UNF, previously, \$223,024 UNF.* The budget expenditures will need to be reduced to cover this shortfall. The State reimbursed the District at a 75.5% rate increasing the reimbursement by \$30,601 and the expected deduction of \$102,419 was \$92,183, slightly less than anticipated.

LINE 16 on Page 2: RENTAL INCOME:

The forecast is estimated to be \$5,158 FAV previously, \$4,618 UNF based on actual rentals year-to-date.

LINE 17 on Page 2: INTERGOVERNMENTAL INCOME:

The forecast is \$95 FAV for shared services with the Woodbridge Board of Education for technology services.

LINE 18 on Page 2: OTHER REVENUE:

The forecast is *\$242 UNF, previously \$242 UNF.*

EXPENDITURES BY CATEGORY

The projected yearend balance of expenditures is **\$707,212 FAV, previously \$585,290 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. Additional savings are forecasted from a mid-year retirement that may not be filled until July. An estimated number of stipend positions for clubs and activities are vacant, \$12,878 FAV, coverage costs are expected to be \$72,322 UNF based on YTD costs, **total for the certified salary line is \$459,220 FAV, previously \$396,739 FAV. There was significant savings in the substitute account as the District moved to a structure of hiring more in-house substitutes which reduces the costs to the outside agency.** There are unpaid LOAs and several vacancies. The cost for outside substitutes is lower than expected, though there is an increase in coverage costs by staff. The net between the two methods of covering absences is a savings of \$13,435. Degree changes are less budgeted by \$20,137 FAV. The budget is based on the annual staff survey. One of the long-term absences will require a transfer to cover the services of a temporary replacement on the professional technical line.

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 \$147,685 FAV, previously, \$117,651 favorable.** Substitutes costs are higher than budgeted due to the higher turnover and vacant positions. Unpaid leaves of absences \$15,673 FAV, **unfilled paraeducators position (no applicants) \$22,139 FAV previously \$13,039 FAV, other unfilled positions \$25,112 previously \$9,112 FAV, overtime is \$6,336 less than budgeted** and \$25,280 FAV for student help desk which has a smaller pool of students and later start in the school year than budgeted.

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

The forecast is based on the budget. **The actual expenses are \$25,979 FAV in medicare taxes and \$9,517 FAV in social security taxes.** This is due to vacancies and unpaid leaves of absences.

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 \$61,932 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's 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 claims 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 actual expenses for claims and fees of current employees and retirees is \$27,846 FAV with the budget, previously neutral. Another factor affecting claims is that there was consistently 5 plus positions vacant all year. If these positions were able to be filled, each would have been offered benefits. For example there has been unfilled paraeducators positions all year. The forecast has previously included requests for consultants to assist in covering but no benefits are offered to consultants. The projected monthly budget is based on an average of five years of claims.

CLAIMS OF CURRENT EMPLOYEES AND RETIREES

MONTH	2021-2022 ACTUAL	2021-2022 BUDGET	VARIANCE	2020-2021 ACTUAL	2019-2020 ACTUAL
<i>JUL</i>	\$ 530,877	\$ 369,954	\$ 160,923	\$ 256,509	\$ 366,182
<i>AUG</i>	\$ 405,635	\$ 426,870	\$ (21,235)	\$ 200,490	\$ 383,765
<i>SEP</i>	\$ 364,327	\$ 363,929	\$ 398	\$ 292,575	\$ 317,685
<i>OCT</i>	\$ 341,109	\$ 361,074	\$ (19,965)	\$ 293,360	\$ 383,369
<i>NOV</i>	\$ 324,557	\$ 464,671	\$ (140,114)	\$ 409,279	\$ 370,672
<i>DEC</i>	\$ 767,843	\$ 507,134	\$ 260,709	\$ 489,999	\$ 403,126
<i>JAN</i>	\$ 320,277	\$ 325,625	\$ (5,348)	\$ 253,077	\$ 348,820
<i>FEB</i>	\$ 176,127	\$ 312,242	\$ (136,115)	\$ 259,775	\$ 124,317
<i>MAR</i>	\$ 263,761	\$ 366,860	\$ (103,099)	\$ 255,965	\$ 276,832
<i>APR</i>	\$ 328,046	\$ 303,014	\$ 25,032	\$ 304,485	\$ 196,735
<i>MAY</i>	\$ 183,944	\$ 379,181	\$ (195,237)	\$ 235,252	\$ 124,900
<i>JUN</i>	\$ 371,250	\$ 318,269	\$ 52,981	\$ 274,741	\$ 194,428
TOTALS	\$ 4,377,753	\$ 4,498,824	\$ (121,071)	\$ 3,525,507	\$ 3,490,831

ACTUAL/FORECAST CLAIMS AS A PERCENTAGE OF EXPECTED CLAIMS

2017-2018 ACTUAL	2018-2019 ACTUAL	2019-2020 ACTUAL	2020-2021 ACTUAL	2021-2022 FORECAST
72.1%	92.2%	84.1%	75.8%	97.3%

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

MONTH	2021-2022 ACTUAL	2021-2022 BUDGET	VARIANCE	2020-2021 ACTUAL	2019-2020 ACTUAL
<i>JUL</i>	\$ 14,068	\$ 49,997	\$ (35,929)	\$ 53,562	\$ 65,692
<i>AUG</i>	\$ 74,642	\$ 53,423	\$ 21,219	\$ 50,187	\$ 62,661
<i>SEP</i>	\$ 46,923	\$ 45,088	\$ 1,835	\$ 53,804	\$ 46,306
<i>OCT</i>	\$ 47,049	\$ 51,048	\$ (3,999)	\$ 55,100	\$ 70,245
<i>NOV</i>	\$ 39,556	\$ 42,200	\$ (2,644)	\$ 56,242	\$ 59,406
<i>DEC</i>	\$ 51,770	\$ 39,812	\$ 11,958	\$ 55,608	\$ 62,365
<i>JAN</i>	\$ 48,349	\$ 36,118	\$ 12,231	\$ 11,403	\$ 73,157
<i>FEB</i>	\$ 81,821	\$ 44,037	\$ 37,784	\$ 94,489	\$ 57,592
<i>MAR</i>	\$ 34,780	\$ 38,241	\$ (3,461)	\$ 80,240	\$ 58,624
<i>APR</i>	\$ 37,237	\$ 38,834	\$ (1,597)	\$ 54,687	\$ 57,573
<i>MAY</i>	\$ 41,664	\$ 40,369	\$ 1,295	\$ 59,398	\$ 56,459
<i>JUN</i>	\$ 44,118	\$ 36,858	\$ 7,260	\$ 50,341	\$ 56,502
TOTALS	\$ 561,977	\$ 516,024	\$ 45,953	\$ 675,061	\$ 726,582

LINE 9 on Page 3: 5260-LIFE INSURANCE:

Actual expenses are \$3,500 FAV previously, \$1,310 UNF based on actual staff.

LINE 10 on Page 3: 5275-DISABILITY INSURANCE:

Actual expenses are \$400 FAV, previously \$762 UNF.

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

Actual expenses are \$2,922 FAV.

LINE 15 on Page 3: 5290-UNEMPLOYMENT:

The forecast is based on actual charges, *neutral, previously neutral*. There are no anticipated unemployment claims for the remainder of the year. The District administration participated in many hearings for contested cases throughout the year. These cases go back as far as March of 2020 and are just now getting heard. The District has successfully contested most cases but two cases were found in favor of the employee in May. Higher charges are expected as a result of these findings.

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

The forecast projects the legal budget will be *\$103,453 UNF, previously \$156,195 UNF*. A long-term temporary replacement is contracted to cover an extended leave of absence and additional BCBA and behavioral therapist services are required to meet the needs of our students. Transfers were approved in January. The Director of Special Education has requested a transfer to cover unfilled paraeducators positions. This transfer covers the fees associated with contracting with an agency to provide paraprofessional support in absence of ARSD being able to hire our own paraprofessional. This transfer utilizes unspent paraprofessional funds due to open and unfilled positions.

LINE 21 on Page 3: 5440-RENTALS:

The forecast is \$40,537 FAV, previously \$24,096 FAV. The arrangement with University of New Haven (UNH) was expected to cost \$15,000 but the UNH waived all fees to partner with Amity staff and students and the additional class at AMC was not available to rent, \$11,000 FAV. A \$7,000 transfer was requested to move funds for van rentals for athletics to transportation. Rental vans are not currently available. High school sports rentals was underbudget by \$12,000 and principal accounts rentals were under budget by \$2,500.

LINE 22 on Page 3: 5510-PUPIL TRANSPORTATION:

Special Education Transportation is projected to be *\$158,267 FAV*, previously *\$115,472 FAV*, based on current student placements, late runs,. A transfer was approved to move funds for van rentals for athletics to transportation. Rental vans are not currently available. *Athletic transportation was underbudget by \$45,421 FAV and school field trips was underbudget by \$10,360.*

LINE 23 on Page 3: 5521-GENERAL LIABILITY INSURANCE: Various liability policies, including medical professional, Student Accident insurance and cyberinsurance renewed higher than budgeted. The completed athletic projects were added to the property coverage (in November) and invoiced this month for an additional \$1,415 premium. **Account is \$33,139 UNF, previously \$16,604 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 \$16,605 FAV. An onboarding software was purchased to digitize hiring forms for \$8,396 UNF. Video door access systems were replaced for \$19,576 as the current systems were out of date and not reliable. *Actual expenses are \$6,426 UNF previously \$8,209 FAV.*

LINE 25 on Page 3: 5560-TUITION EXPENSE:

Tuition account has a \$770,944 FAV previously \$553,951 FAV variance. The forecast is based on current students and their placements. Expenditures for DCF placements, court placements, due process, and hospital tutoring are all underbudget.

Tuition for the vo-ag schools has a projected variance of *\$33,969 FAV previously, \$30,067 FAV.*

	FY17-18 ACTUAL	FY18-19 ACTUAL	FY19-20 ACTUAL	FY20-21 ACTUAL	FY21-22 BUDGET	FY21-22 FORECAST
Sound	4	6	6	5	6	<i>3(3)</i>
Trumbull	6	4	4	3	3	<i>1(1)</i>
Nonnewaug	4	6	5	7	7	<i>9(9)</i>
Common Ground Charter HS	0	0	0	1	1	<i>1(1)</i>
Betsy Ross Magnet	0	0	0	0	1	<i>0(0)</i>
Wintergreen Magnet	0	0	0	0	0	<i>1(1)</i>

Engineering Science Magnet	1	0	0	0	0	0
Highville Charter School	1	0	0	0	0	0
Totals	16	16	15	16	18	15(15)

ECA has a variance of \$11,360 FAV, with two less students enrolled than budgeted.

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

Public (ACES) and private out-of-district placements are currently less than anticipated, \$725,615 FAV, previously \$512,524 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	10(10)
Private SPED	20	22	18	27	25	20(20)
Totals	28	33	26	33	39	30(30)

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

Actual expenditures are under budget, \$8,666 FAV, previously \$5,000 FAV.

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. **Actual expenses are \$60,346 FAV previously, \$74,263 FAV.** Historical trends were reviewed in the budget process and the FY23 budgeted amount is lower by \$30,502. Along with two years of irregular data, there has been periodic spikes in the delivery charges that have been difficult to forecast. To date we have not experienced many warm days calling for air conditioning. **A credit from the UI for fuel cell usage was received June 7, 2022 in the amount of \$24,991 bringing the YTD credit to \$49,888 FAV.**

There was a Load Shed credit of \$5,852 FAV.

The budget for propane is \$3,546. **Actual costs are \$730 FAV, previously neutral.**

The budget for water is \$57,350. **Actual costs are \$43,197, \$14,154 FAV due to a credit on the account, previously \$19,868.**

Sewer costs are budgeted at \$25,000. **Actual costs are \$5,212 FAV, previously, \$5,000 FAV.**

ELECTRICITY (KILOWATT HOURS)

MONTH	2021-2022 FORECAST	2021-2022 BUDGET	VARIANCE	2020-2021 ACTUAL	2019-2020 ACTUAL
<i>JUL</i>	296,292	253,660	42,632	254,686	306,744
<i>AUG</i>	321,023	287,736	33,287	299,439	298,187
<i>SEP</i>	314,756	303,777	10,979	285,993	255,198
<i>OCT</i>	272,755	282,968	(10,213)	248,089	294,827
<i>NOV</i>	256,208	262,230	(6,022)	238,583	243,754
<i>DEC</i>	259,994	263,699	(3,705)	240,912	250,944
<i>JAN</i>	257,539	273,187	(15,648)	249,595	266,227
<i>FEB</i>	271,979	268,924	3,055	243,774	251,802
<i>MAR</i>	255,631	255,252	379	246,886	217,683
<i>APR</i>	255,629	265,084	(9,455)	254,711	232,983
<i>MAY</i>	277,953	243,404	34,549	244,685	145,568
<i>JUN</i>	296,900	229,947	66,953	290,054	239,032
Totals	3,336,659	3,189,868	146,791	3,097,407	3,002,949

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

DEGREE DAYS

There were 3,726 degree days to date compared to 3,988 last year at this time.

LINE 32 on Page 4: 5420-REPAIRS & MAINTENANCE: *Actual costs are \$195,268 UNF, previously \$210,356 UNF* 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. Snow removal is overbudget by \$10,150 UNF and a transfer was approved in April. Transfers are requested this month to flush the glycol loop at AMSO (\$100,000), repair the modular roof at AMSB (\$23,960), and repair the courtyard at AMSB (\$62,000).

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. Actual expenses for natural gas are *\$5,223 UNF, previously \$6,400 UNF*. *Oil costs are \$2,198 FAV, previously neutral.*

LINE 42 on Page 4: 5730-EQUIPMENT -NEW: The Board approved \$8,100 UNF for LiveScan Fingerprinting Equipment in October and \$10,470 UNF for vaping sensors in November. The special education department needed furniture for new staff \$1,500 UNF. The Board approved a transfer in April for fireproof file cabinets for special education records, \$7,900 UNF. The \$12,158 for additional picnic tables approved by the Board in April. New equipment was purchased for physical education and music at the middle schools. *The account is \$43,105 UNF, previously \$42,137 UNF.*

LINE 43 on Page 4: 5731-EQUIPMENT -REPLACEMENT:

The facilities department requested an auto scrubber to replace aging equipment that is not fully operational and costly to repair, \$6,854 UNF, exercise bike for the high school physical education department, \$4,140 UNF, cello for music \$1,300 UNF, a laminator for Bethany library, \$1,750 UNF and the cafeterias need new computers to run updated software, \$11,754 UNF. *The account is \$32,688 UNF, previously \$19,082 UNF.* A transfer is requested for a refrigerator for consumer science rooms.

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 system at Amity Middle School –Orange and to schedule replace for Amity Middle School –Bethany. A budget transfer was approved in February for an auto scrubber. If these funds are available in June, the Administration will request a transfer to Improvements of Sites to subsidize the construction of the outdoor classrooms. A transfer was approved for \$10,150 to cover snow plowing and sanding which is overbudget. *The balance is \$0 FAV, previously \$0 FAV.* Transfer is requested to cover a portion of the glycol loop flush at AMSO.

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. The Board approved \$10,470 for vape sensors in November. *The balance in contingency is \$0 FAV, previously \$0 FAV.* If these funds are available in June, the Administration will request a transfer to Improvements of Sites to subsidize the construction of the outdoor classrooms. The Board approved a transfer in June to cover a portion of the glycol loop flush at AMSO and the outdoor structures at the middle schools.

LINES 49 & 50 on Page 4: 5580 & 5581-STAFF TRAVEL/CONFERENCES:

The forecast assumes these funds will be not be entirely used due to more conferences remaining virtual. Virtual conferences avoid travel costs for staff and some conferences are priced lower for virtual presentations. Forecast is **\$27,457 FAV, previously, \$27,844 FAV.**

LINE 53 on Page 4: 5856-TRANSFER:

The forecast includes 2%, \$1,033,963, previously \$516,981, of the unaudited fund balance will be appropriated to the capital non-recurring account. The District is legally allowed to transfer with Board approval up to 2% or \$1,033,963 of the FY22 budget. The item will be presented after the final balance for the FY22 is confirmed at the August 2022 meeting.

COVID ACCOUNTS:

Year to date, the District committed \$36,096 which is \$8,901 UNF, previously \$8,750 UNF to purchases related to operating safely during the pandemic. Transfers were approved to cover accounts.

AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES AND EXPENDITURES
FOR FY 2022-2023

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2021-2022	2022-2023	SOY 22	CHANGE	JUL 22	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./((DECR.))	FORECAST	OVER/(UNDER)	UNF
1	MEMBER TOWN ALLOCATIONS	50,495,238	52,349,608	52,349,608	0	52,349,608	0	FAV
1a	CARRY OVER FUNDS	0	0	0	607,149	607,149	607,149	FAV
2	OTHER REVENUE	130,512	114,296	721,445	1,291	722,736	608,440	FAV
3	OTHER STATE GRANTS	843,114	844,861	844,861	(34,809)	810,052	(34,809)	UNF
4	MISCELLANEOUS INCOME	45,809	41,040	41,040	0	41,040	0	FAV
5	BUILDING RENOVATION GRANTS	0	0	0	0	0	0	FAV
6	TOTAL REVENUES	51,514,673	53,349,805	53,956,954	(33,518)	53,923,436	573,631	FAV
7	SALARIES	27,429,916	28,830,023	28,830,023	0	28,830,023	0	FAV
8	BENEFITS	5,464,945	6,046,203	6,046,203	(30,447)	6,015,756	(30,447)	FAV
9	PURCHASED SERVICES	8,856,445	10,234,922	10,234,922	7,819	10,242,741	7,819	UNF
10	DEBT SERVICE	4,453,835	4,485,716	4,485,716	0	4,485,716	0	FAV
11	SUPPLIES (INCLUDING UTILITIES)	3,159,640	3,157,931	3,157,931	0	3,157,931	0	FAV
12	EQUIPMENT	130,141	86,552	86,552	0	86,552	0	FAV
13	IMPROVEMENTS / CONTINGENCY	340,143	308,000	308,000	0	308,000	0	FAV
14	DUES AND FEES	121,967	200,458	200,458	0	200,458	0	FAV
15	TRANSFER ACCOUNT	1,033,963	0	0	0	0	0	FAV
16	TOTAL EXPENDITURES	50,990,995	53,349,805	53,349,805	(22,628)	53,327,177	(22,628)	FAV
17	SUBTOTAL	523,678	0	607,149	(10,890)	596,259	596,259	FAV
18	PLUS: CANCELLATION OF PRIOR YEAR'S ENCUMBRANCES	83,471	0	0	0	0	0	FAV
19	DESIGNATED FOR SUBSEQUENT YEAR'S BUDGET:	0	0	0	0	0	0	FAV
20	NET BALANCE / (DEFICIT)	607,149	0	607,149	(10,890)	596,259	596,259	FAV

Column 7: FAV=Favorable Variance

Revenues: At or OVER budget, Expenditures: At or UNDER budget

**AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES AND EXPENDITURES
FOR FY 2022-2023**

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2021-2022	2022-2023	SOY 22	CHANGE	JUL 22	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./((DECR.)	FORECAST	OVER/(UNDER)	UNF
1	BETHANY ALLOCATION	8,983,609	8,918,279	8,918,279	0	8,918,279	0	FAV
2	ORANGE ALLOCATION	25,236,005	26,367,974	26,367,974	0	26,367,974	0	FAV
3	WOODBIDGE ALLOCATION	16,275,624	17,063,355	17,063,355	0	17,063,355	0	FAV
4	MEMBER TOWN ALLOCATIONS	50,495,238	52,349,608	52,349,608	0	52,349,608	0	FAV
5	CARRY OVER FUNDS	0	0	607,149	0	607,149	607,149	FAV
6	ADULT EDUCATION	4,341	4,000	4,000	0	4,000	0	FAV
7	PARKING INCOME	31,146	32,400	32,400	0	32,400	0	FAV
8	INVESTMENT INCOME	4,975	5,000	5,000	0	5,000	0	FAV
9	ATHLETICS	26,516	24,000	24,000	0	24,000	0	FAV
10	TUITION REVENUE	44,034	25,496	25,496	1,291	26,787	1,291	FAV
11	TRANSPORTATION INCOME	19,500	23,400	23,400	0	23,400	0	FAV
12	TRANSPORTATION BOWA AGREEMENT	0	0	0	0	0	0	FAV
13	OTHER REVENUE	130,512	114,296	721,445	1,291	722,736	608,440	FAV
14	OTHER STATE GRANT	0	0	0	0	0	0	FAV
15	SPECIAL EDUCATION GRANTS	843,114	844,861	844,861	(34,809)	810,052	(34,809)	UNF
16	OTHER STATE GRANTS	843,114	844,861	844,861	(34,809)	810,052	(34,809)	UNF
17	RENTAL INCOME	23,158	18,000	18,000	0	18,000	0	FAV
18	INTERGOVERNMENTAL REVENUE	4,893	5,040	5,040	0	5,040	0	FAV
19	OTHER REVENUE	17,758	18,000	18,000	0	18,000	0	FAV
20	TRANSFER IN	0	0	0	0	0	0	FAV
21	MISCELLANEOUS INCOME	45,809	41,040	41,040	0	41,040	0	FAV
22	BUILDING RENOVATION GRANTS	0	0	0	0	0	0	FAV
23	TOTAL REVENUES	51,514,673	53,349,805	53,956,954	(33,518)	53,923,436	573,631	FAV

Column 7: FAV=Favorable Variance

Revenues: At or OVER budget, Expenditures: At or UNDER budget

**AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES AND EXPENDITURES
FOR FY 2022-2023**

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2021-2022	2022-2023	SOY 22	CHANGE	JUL 22	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
1	5111-CERTIFIED SALARIES	22,456,124	23,647,192	23,647,192	0	23,647,192	0	FAV
2	5112-CLASSIFIED SALARIES	4,973,792	5,182,831	5,182,831	0	5,182,831	0	FAV
3	SALARIES	27,429,916	28,830,023	28,830,023	0	28,830,023	0	FAV
4	5200-MEDICARE - ER	381,832	423,336	423,336	0	423,336	0	FAV
5	5210-FICA - ER	301,888	315,346	315,346	0	315,346	0	FAV
6	5220-WORKERS' COMPENSATION	152,365	175,153	175,153	(30,447)	144,706	(30,447)	FAV
7	5255-MEDICAL & DENTAL INSURANCE	3,647,858	4,018,260	4,018,260	0	4,018,260	0	FAV
8	5860-OPEB TRUST	0	155,474	155,474	0	155,474	0	FAV
9	5260-LIFE INSURANCE	46,418	55,110	55,110	0	55,110	0	FAV
10	5275-DISABILITY INSURANCE	10,736	11,757	11,757	0	11,757	0	FAV
11	5280-PENSION PLAN - CLASSIFIED	764,395	725,924	725,924	0	725,924	0	FAV
12	5281-DEFINED CONTRIBUTION RETIREMENT PLAN	145,496	153,143	153,143	0	153,143	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	12,498	10,500	10,500	0	10,500	0	FAV
16	5291-CLOTHING ALLOWANCE	1,459	2,200	2,200	0	2,200	0	FAV
17	BENEFITS	5,464,945	6,046,203	6,046,203	(30,447)	6,015,756	(30,447)	FAV
18	5322-INSTRUCTIONAL PROG IMPROVEMENT	28,159	10,000	10,000	0	10,000	0	FAV
19	5327-DATA PROCESSING	105,022	131,078	131,078	0	131,078	0	FAV
20	5330-PROFESSIONAL & TECHNICAL SRVC	1,853,093	2,063,594	2,063,594	0	2,063,594	0	FAV
21	5440-RENTALS - LAND, BLDG, EQUIPMENT	82,148	116,525	116,525	0	116,525	0	FAV
22	5510-PUPIL TRANSPORTATION	3,441,388	3,933,934	3,933,934	0	3,933,934	0	FAV
23	5521-GENERAL LIABILITY INSURANCE	282,789	278,907	278,907	7,819	286,726	7,819	UNF
24	5550-COMMUNICATIONS: TEL, POST, ETC.	117,698	114,492	114,492	0	114,492	0	FAV
25	5560-TUITION EXPENSE	2,867,711	3,495,200	3,495,200	0	3,495,200	0	FAV
26	5590-OTHER PURCHASED SERVICES	78,437	91,192	91,192	0	91,192	0	FAV
27	PURCHASED SERVICES	8,856,445	10,234,922	10,234,922	7,819	10,242,741	7,819	UNF

Column 7: FAV=Favorable Variance

Revenues: At or OVER budget, Expenditures: At or UNDER budget

**AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES AND EXPENDITURES
FOR FY 2022-2023**

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2021-2022	2022-2023	SOY 22	CHANGE	JUL 22	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	3,696,881	3,696,881	0	3,696,881	0	FAV
30	DEBT SERVICE	4,453,835	4,485,716	4,485,716	0	4,485,716	0	FAV
31	5410-UTILITIES, EXCLUDING HEAT	588,883	709,704	709,704	0	709,704	0	FAV
32	5420-REPAIRS, MAINTENANCE & CLEANING	943,019	731,680	731,680	0	731,680	0	FAV
33	5611-INSTRUCTIONAL SUPPLIES	328,841	366,812	366,812	0	366,812	0	FAV
34	5613-MAINTENANCE/CUSTODIAL SUPPLIES	189,616	225,305	225,305	0	225,305	0	FAV
35	5620-OIL USED FOR HEATING	40,302	47,500	47,500	0	47,500	0	FAV
36	5621-NATURAL GAS	73,394	69,941	69,941	0	69,941	0	FAV
37	5627-TRANSPORTATION SUPPLIES	102,352	143,809	143,809	0	143,809	0	FAV
38	5641-TEXTS & DIGITAL RESOURCES	237,914	154,742	154,742	0	154,742	0	FAV
39	5642-LIBRARY BOOKS & PERIODICALS	20,852	20,857	20,857	0	20,857	0	FAV
40	5690-OTHER SUPPLIES	634,467	241,071	241,071	0	241,071	0	FAV
41	5695-OTHER SUPPLIES-TECHNOLOGY	0	446,510	446,510	0	446,510	0	FAV
42	SUPPLIES (INCLUDING UTILITIES)	3,159,640	3,157,931	3,157,931	0	3,157,931	0	FAV
43	5730-EQUIPMENT - NEW	92,453	13,012	13,012	0	13,012	0	FAV
44	5731-EQUIPMENT - REPLACEMENT	37,688	5,980	5,980	0	5,980	0	FAV
45	5732-EQUIPMENT - TECH -NEW	0	63,960	63,960	0	63,960	0	FAV
46	5733-EQUIPMENT - TECH - REPLACEMENT	0	3,600	3,600	0	3,600	0	FAV
47	EQUIPMENT	130,141	86,552	86,552	0	86,552	0	FAV
48	5715-IMPROVEMENTS TO BUILDING	67,775	19,000	19,000	0	19,000	0	FAV
48a	5715-FACILITIES CONTINGENCY	100,000	100,000	100,000	0	100,000	0	FAV
48b	TRSF. FROM FACILITIES CONTINGENCY	(100,000)	0	0	0	0	0	FAV
48	5720-IMPROVEMENTS TO SITES	272,368	39,000	39,000	0	39,000	0	FAV
49	5850-DISTRICT CONTINGENCY	150,000	150,000	150,000	0	150,000	0	FAV
49a	TRSF. FROM CONTINGENCY TO OTHER ACCTS.	(150,000)	0	0	0	0	0	FAV
50	IMPROVEMENTS / CONTINGENCY	340,143	308,000	308,000	0	308,000	0	FAV
51	5580-STAFF TRAVEL	8,201	21,700	21,700	0	21,700	0	FAV
52	5581-TRAVEL - CONFERENCES	32,992	70,475	70,475	0	70,475	0	FAV
53	5810-DUES & FEES	80,774	108,283	108,283	0	108,283	0	FAV
54	DUES AND FEES	121,967	200,458	200,458	0	200,458	0	FAV
55	5856-TRANSFER ACCOUNT	1,033,963	0	0	0	0	0	FAV
56	ESTIMATED UNSPENT BUDGETS		0	0	0	0	0	FAV
55	TOTAL EXPENDITURES	50,990,995	53,349,805	53,349,805	(22,628)	53,327,177	(22,628)	FAV

Column 7: FAV=Favorable Variance

Revenues: At or OVER budget, Expenditures: At or UNDER budget

**AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES & EXPENDITURES BY CATEGORY
FINANCIAL ANALYSIS
FOR THE FISCAL YEAR 2022-2023**



JULY 2022

2022-2023 FORECAST

OVERVIEW

The projected unspent fund balance for this fiscal year is \$596,256 FAV, which appears on page 1, column 6, and line 20. The surplus is a result of carry over funds from the end of FY22. Recent review of CGS 10-51 requires to funds to be carried forward. This administration will request upto 2% of any available surplus as an end-of-year transfer. The appropriation request to the capital and non-recurring account will be shown on line 53 of the Excel file if funds become available during the year. The District is legally allowed to transfer with Board approval up to 2% or \$1,066,995 of the current budget. The item will be presented after the final balance for FY23 is confirmed at the August 2023 meeting.

REVENUES BY CATEGORY

The projected yearend balance of revenues is \$573,631 FAV, which appears on page 2, column 6, line 23.

LINE 5 on Page 2: CARRY OVER FUNDS:

The forecast is based legal guidance requiring prior year surplus is applied to next year's budget. \$607,146 FAV. This is comprised of \$523,678 of unspent funds in FY22 and liquidated encumbrances from FY21 of \$83,471. This revenue surplus from prior year is carried over into the FY23 budget as a revenue surplus to be applied to the FY24 budget.

LINE 6 on Page 2: ADULT EDUCATION:

The forecast is based on historical State payments. The forecast is neutral.

LINE 7 on Page 2: PARKING INCOME:

The forecast is based on the budget developed on historical payments. The forecast is neutral.

LINE 8 on Page 2: INVESTMENT INCOME:

The forecast is based on the budget developed . The forecast is neutral.

<u>Month</u>	<u>Peoples United</u>	<u>State Treasurer's Investment Fund</u>
July 2022	.398%	.1620%

LINE 9 on Page 2: ATHLETICS:

The forecast is based on the budget developed on historical payments. *The forecast is neutral.*

LINE 10 on Page 2: TUITION REVENUE:

The budget is based on two tuition students, one at a reduced employee rate. The actual tuition charged is higher (\$972 per year). *The forecast is \$1,291 FAV.*

LINE 11 on Page 2: TRANSPORTATION INCOME:

The forecast is based on projected State payments and enrollment for magnet school transportation budgeted. *The forecast is neutral.*

LINE 15 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 State passed legislation which reduced the District's reimbursement rate to 70%. The estimated deduction of \$34,809 is forecasted.*

LINE 17 on Page 2: RENTAL INCOME:

The forecast is based on the budget developed on historical payments. *The forecast is neutral.*

LINE 18 on Page 2: INTERGOVERNMENTAL INCOME:

The forecast is based on the budget developed on historical payments. *The forecast is neutral.*

LINE 19 on Page 2: OTHER REVENUE:

The forecast is based on the budget developed on historical payments. *The forecast is neutral.*

EXPENDITURES BY CATEGORY

The projected yearend balance of expenditures is *\$22,628 FAV* which appears on page 4, column 6, line 56.

LINE 1 on Page 3: 5111-CERTIFIED SALARIES:

The forecast is based on budget. Actual estimates will be calculated after all staff is hired. This will be updated in the September for the October report.

LINE 2 on Page 3: 5112-CLASSIFIED SALARIES:

The forecast is based on budget. Actual estimates will be calculated after all staff is hired. This will be updated in the September for the October report.

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 **\$22,298 FAV**. The renewal policy is \$8,149 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 \$30,447 FAV.**

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

The following charts are included to track how the District's 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 claims 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 projects actual claims and fees of current employees and retirees will be neutral with the budget. The projected monthly budget is based on an average of five years of claims.

CLAIMS OF CURRENT EMPLOYEES AND RETIREES

MONTH	2022-2023 ACTUAL	2022-2023 BUDGET	VARIANCE	2021-2022 ACTUAL	2020-2021 ACTUAL
JUL*	\$ 34,837	\$ 416,087	\$ (381,250)	\$ 530,877	\$ 256,509
AUG	\$ 402,727	\$ 402,727	\$ -	\$ 405,635	\$ 200,490
SEP	\$ 384,095	\$ 384,095	\$ -	\$ 364,327	\$ 292,575
OCT	\$ 375,480	\$ 375,480	\$ -	\$ 341,109	\$ 293,360
NOV	\$ 458,947	\$ 458,947	\$ -	\$ 324,557	\$ 409,279
DEC	\$ 566,109	\$ 566,109	\$ -	\$ 767,843	\$ 489,999
JAN	\$ 353,446	\$ 353,446	\$ -	\$ 320,277	\$ 253,077
FEB	\$ 273,133	\$ 273,133	\$ -	\$ 176,127	\$ 259,775
MAR	\$ 354,451	\$ 354,451	\$ -	\$ 263,761	\$ 255,965
APR	\$ 323,033	\$ 323,033	\$ -	\$ 328,046	\$ 304,485
MAY	\$ 305,994	\$ 305,994	\$ -	\$ 183,944	\$ 235,252
JUN	\$ 328,580	\$ 328,580	\$ -	\$ 371,250	\$ 274,741
TOTALS	\$ 4,160,833	\$ 4,542,083	\$ (381,250)	\$ 4,377,753	\$ 3,525,507

ACTUAL/FORECAST CLAIMS AS A PERCENTAGE OF EXPECTED CLAIMS

2018-2019 ACTUAL	2019-2020 ACTUAL	2020-2021 ACTUAL	2021-2022 ACTUAL	2022-2023 FORECAST
92.2%	84.1%	75.8%	97.3%	100%

***Incomplete billing cycle**

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

MONTH	2022-2023 ACTUAL	2022-2023 BUDGET	VARIANCE	2021-2022 ACTUAL	2020-2021 ACTUAL
JUL	\$ 30	\$ 49,997	\$ (49,967)	\$ 14,068	\$ 53,562
AUG	\$ 53,423	\$ 53,423	\$ -	\$ 74,642	\$ 50,187
SEP	\$ 45,088	\$ 45,088	\$ -	\$ 46,923	\$ 53,804
OCT	\$ 51,048	\$ 51,048	\$ -	\$ 47,049	\$ 55,100
NOV	\$ 42,200	\$ 42,200	\$ -	\$ 39,556	\$ 56,242
DEC	\$ 39,812	\$ 39,812	\$ -	\$ 51,770	\$ 55,608
JAN	\$ 36,118	\$ 36,118	\$ -	\$ 48,349	\$ 11,403
FEB	\$ 44,037	\$ 44,037	\$ -	\$ 81,821	\$ 94,489
MAR	\$ 38,241	\$ 38,241	\$ -	\$ 34,780	\$ 80,240
APR	\$ 38,834	\$ 38,834	\$ -	\$ 37,237	\$ 54,687
MAY	\$ 40,369	\$ 40,369	\$ -	\$ 41,664	\$ 59,398
JUN	\$ 36,858	\$ 36,858	\$ -	\$ 44,118	\$ 50,341
TOTALS	\$ 466,057	\$ 516,024	\$ (49,967)	\$ 561,977	\$ 675,061

LINE 9 on Page 3: 5260-LIFE INSURANCE:

The forecast is based on budget.

LINE 10 on Page 3: 5275-DISABILITY INSURANCE:

The forecast is based on budget.

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 21 on Page 3: 5440-RENTALS:

The forecast is based on budget.

LINE 22 on Page 3: 5510-PUPIL TRANSPORTATION:

Special Education Transportation is under review as student enrollment and needs are not finalized for the start of the year. More information will be available in next month's report.

LINE 23 on Page 3: 5521-GENERAL LIABILITY INSURANCE: Various liability policies, including medical professional, and cyberinsurance renewed higher than budgeted while Student Accident insurance renewed underbudget. **Account is \$7,819 UNF.**

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

The forecast is based on budget.

LINE 25 on Page 3: 5560-TUITION EXPENSE:

Special Education tuition is under review as student enrollment and needs are not finalized for the start of the year. More information will be available in next month's report. Savings are anticipated on these lines but transfers will be requested to address student needs in the District.

Tuition for the vo-ag schools has a under review.

	FY18-19 ACTUAL	FY19-20 ACTUAL	FY20-21 ACTUAL	FY21-22 ACTUAL	FY22-23 BUDGET	FY22-23 FORECAST
Sound	4	6	5	3	5	2
Trumbull	6	4	3	1	3	3
Nonnewaug	4	5	7	9	9	7
Common Ground Charter HS	0	0	1	1	1	2
Betsy Ross Magnet	0	0	0	0	1	0
Wintergreen Magnet	0	0	0	1	0	1
Engineering Science Magnet	1	0	0	0	0	0
Highville Charter School	1	0	0	0	0	0
Totals	16	15	16	15	18	15

ECA is under review.

	FY18-19 ACTUAL	FY19-20 ACTUAL	FY20-21 ACTUAL	FY21-22 ACTUAL	FY22-23 BUDGET	FY22-23 FORECAST
ECA	24	21	16	18	18	21

Public (ACES) and private out-of-district placements are under review.

	FY18-19 ACTUAL	FY19-20 ACTUAL	FY20-21 ACTUAL	FY21-22 ACTUAL	FY22-23 BUDGET	FY22-23 FORECAST
Public SPED	11	8	6	10	12	9
Private SPED	22	18	27	20	24	20
Totals	33	26	33	30	36	23

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

The forecast is based on the budget.

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

The 2022-2023 budget for electricity assumes the use of 3,310,001 kilowatt hours at an average price of 0.1931 or a cost of \$618,404. Forecast is neutral.

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

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

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

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

ELECTRICITY (KILOWATT HOURS)

MONTH	2022-2023 FORECAST	2022-2023 BUDGET	VARIANCE	2021-2022 ACTUAL	2020-2021 ACTUAL
<i>JUL</i>	263,361	263,361	-	296,292	254,686
<i>AUG</i>	292,763	292,763	-	321,023	299,439
<i>SEP</i>	313,930	313,930	-	314,756	285,993
<i>OCT</i>	295,084	295,084	-	272,755	248,089
<i>NOV</i>	269,094	269,094	-	256,208	238,583
<i>DEC</i>	274,129	274,129	-	259,994	240,912
<i>JAN</i>	283,552	283,552	-	257,539	249,595
<i>FEB</i>	280,114	280,114	-	271,979	243,774
<i>MAR</i>	263,718	263,718	-	255,631	246,886
<i>APR</i>	274,727	274,727	-	255,629	254,711
<i>MAY</i>	252,686	252,686	-	277,953	244,685
<i>JUN</i>	246,843	246,843	-	296,900	290,054
Totals	3,310,001	3,310,001	-	3,336,659	3,097,407

DEGREE DAYS

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

LINE 32 on Page 4: 5420-REPAIRS & MAINTENANCE: *The forecast is projected to be neutral.*

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 projected to be neutral.*

LINE 42 on Page 4: 5730-EQUIPMENT -NEW:

The forecast is projected to be neutral.

LINE 43 on Page 4: 5731-EQUIPMENT -REPLACEMENT:

The forecast is projected 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.

LINE 47 on Page 4: 5850-CONTINGENCY:

The budget includes a \$150,000 contingency for unplanned, necessary expenditures. The forecast assumes these funds will be entirely used.

LINES 49 & 50 on Page 4: 5580 & 5581-STAFF TRAVEL/CONFERENCES:

The forecast is projected to be neutral.

LINE 53 on Page 4: 5856-TRANSFER:

This line is used to identify funds for the Capital and Nonrecurring Account transfers. The District is legally allowed to transfer with Board approval up to 2% or \$1,066,995 of the current budget. The item will be presented after the final balance for the FY23 is confirmed at the August 2023 meeting.

APPENDIX A

COST SAVINGS AND EFFICIENCIES FOR FISCAL YEAR 2021-2022

TOTAL ANNUAL SAVINGS TO-DATE OF: \$78,854

\$10,732 Cable Advisory Grant: One of the high school teachers, Jeremy Iverson, applied for and received a grant from Cable Advisory Grant. The grant is to be used to purchase production equipment for the film courses and production room. This reduces the amounts that would be funded through the general fund.

\$18,446 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.

\$8,000 Facilities Repairs: A circulator pump for the boiler started leaking at the high school. In-house maintenance staff pulled the pump and sent it out to have it rebuilt. Once rebuilt, they reinstalled the pump. Cost for the rebuild was \$1,612. with a three year warranty. By pulling the pump and having it rebuilt, we saved potentially an estimated \$4,000 by not having a mechanical contractor called in.

In preparation for the HVAC BMS System upgrade at ARHS, a handful of air handling units needed an upgrade to the communication wiring in order to support the upgrade. Our in-house electrician and building mechanic ran the new wires and with the help of the IT department, terminated the connections to the units and field panels. Since this was not part of the upgrade, we would have had to pay for Siemens technicians to come in and run the wire. Potential savings again were an average \$4,000 factoring on the labor of two technicians for two days plus markup on material costs.

\$17,376 Services for Hearing Impaired: The Director of Pupil Services researched and contracted with a different agency to provide the same level of services.

\$24,300 PEGPETIA Grant: One of the high school teachers, Jeremy Iverson, applied for and received a grant from PEGPEITA. 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.

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

- Energy Savings Initiatives for the past decade
<http://www.amityregion5.org/boe/sub-committees/finance-committe>
- District recognized CQIA Innovation Prize for Fostering a District Culture of Maximizing Cost Savings and Efficiencies
<http://www.amityregion5.org/boe/sub-committees/finance-committee2>

- Fiscal Year 2020-2021 - \$128,708 <https://www.amityregion5.org/boe/sub-committees/finance-committee>
- Fiscal Year 2019-2020 - \$43,497 <https://www.amityregion5.org/boe/sub-committees/finance-committee>
- Fiscal Year 2018-2019 - \$52,451 <https://www.amityregion5.org/boe/sub-committees/finance-committee>
- Fiscal Year 2017-2018 – \$746,688 <https://www.amityregion5.org/boe/sub-committees/finance-committee>
- Fiscal Year 2016-2017 – \$595,302 <http://www.amityregion5.org/boe/sub-committees/finance-committee>
- Fiscal Year 2015-2016 – \$125,911 <http://www.amityregion5.org/boe/sub-committees/finance-committee>
- Fiscal Year 2014-2015 – \$139,721 <http://www.amityregion5.org/boe/sub-committees/finance-committee>

APPENDIX B

MONTHLY FORECASTS: PURPOSE, METHODOLOGY, HISTORICAL

PURPOSE & METHODOLOGY:

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

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

Two of the three past 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. The most recent fiscal year, 2022, also reflects an increase from May to June forecast but is offset by an increase to the Capital Nonrecurring Account request from 1% to 2%.

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).

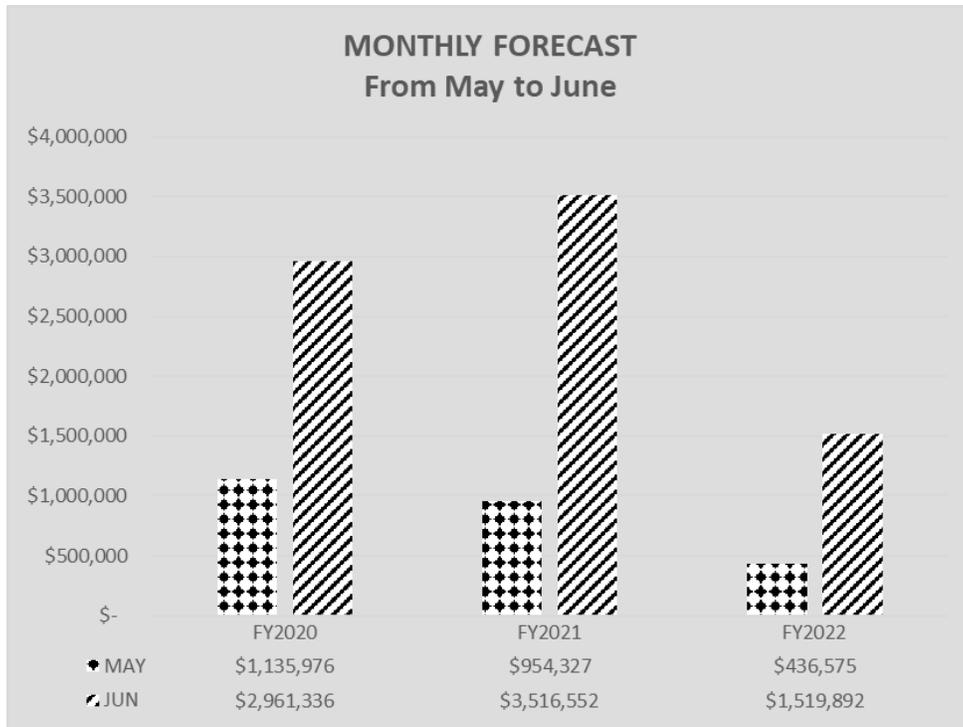
Revenues can be most impacted by decisions made at the State level for Special Education and Transportation grants. We have seen the reimbursement rate change in mid-year.

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 significantly changed 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.

FY2020:

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

- **\$121,462:** Certified and classified salaries were lower due to the school closures. Spring coaches salaries were reduced, substitutes and coverages were not needed, staff development hours, homebound instruction, chaperone duties, and overtime were all near zero.

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

FY2021:

The audited 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 maintenance 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.

FY2022:

The unaudited fund balance is \$523,678. *This surplus from prior year is carried over into the FY23 budget as a revenue surplus to be applied to the FY24 budget.* The monthly forecast for May 2022 projected a fund balance of \$436,575 which included \$516,982 designated for the capital non-recurring account (CNR). The change is **\$566,366 higher than the prior month's forecast including the increase from 1% to 2% to CNR.** The major reasons for the increase in the yearend fund balance from one month to the next month were, as follows:

- **\$102,543:** 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. Overtime and substitute needs are greatest in the final months of the school year due to many extracurricular activities. We hired more in-house substitutes to offset outside agency costs and it proved to be effective.
- **\$33,278:** Medical insurance claims and associated costs were \$27,846 lower than expected. Since we are self-insured, actual claims are not known until the end of the fiscal year. Payroll taxes, life insurance and defined contribution payments were less based on vacant positions.
- **\$344,647** Purchased services were lower than forecasted. This included \$57,363 lower transportation and rental costs for athletics. Transportation needs are partially determined by a team's advancement in tournament play during the year and are difficult to gauge. Athletics rentals of all weather fields at other location for teams' practice experience was not needed and other facility rentals were lower than anticipated. Special education transportation and tuition were also \$259,748 lower due to unexpected changes in outplacements, fewer unanticipated services than budgeted and unfilled positions in the department.

- **\$83,850:** Electrical and water consumption was lower than anticipated. Instructional supplies were less than anticipated.
- **(\$516,982) Capital and Nonrecurring (CNR) Account:** The positive variances above were offset by increasing the CNR request from 1% to 2% based on new information regarding the carrying over of fund balances.

APPENDIX C

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 30th but not yet billed. In some cases, the estimated amount encumbered varies from the actual invoice (e.g., utility bill; water bill) and we do not need to spend the entire encumbrance. Once the audit is final for 2019-2020, the funds will be returned.

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

The audited fund balance for 2019-2020 is \$1,950,777, after the 1% or \$495,482 is transferred to the Capital Nonrecurring Account. The fund balance is net of \$515,077 of end-of-year expenditures that are posted in FY20. The source of the available funds are described below.

SUMMARY:

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

FINANCIAL MANAGEMENT:

\$ 107,610

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

SPECIAL EDUCATION:

\$ 580,502

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

special education expenditures. The State reimbursement rate fluctuates throughout the year. Expenses were down \$580,502 prior to the shutdown.

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

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

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

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

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

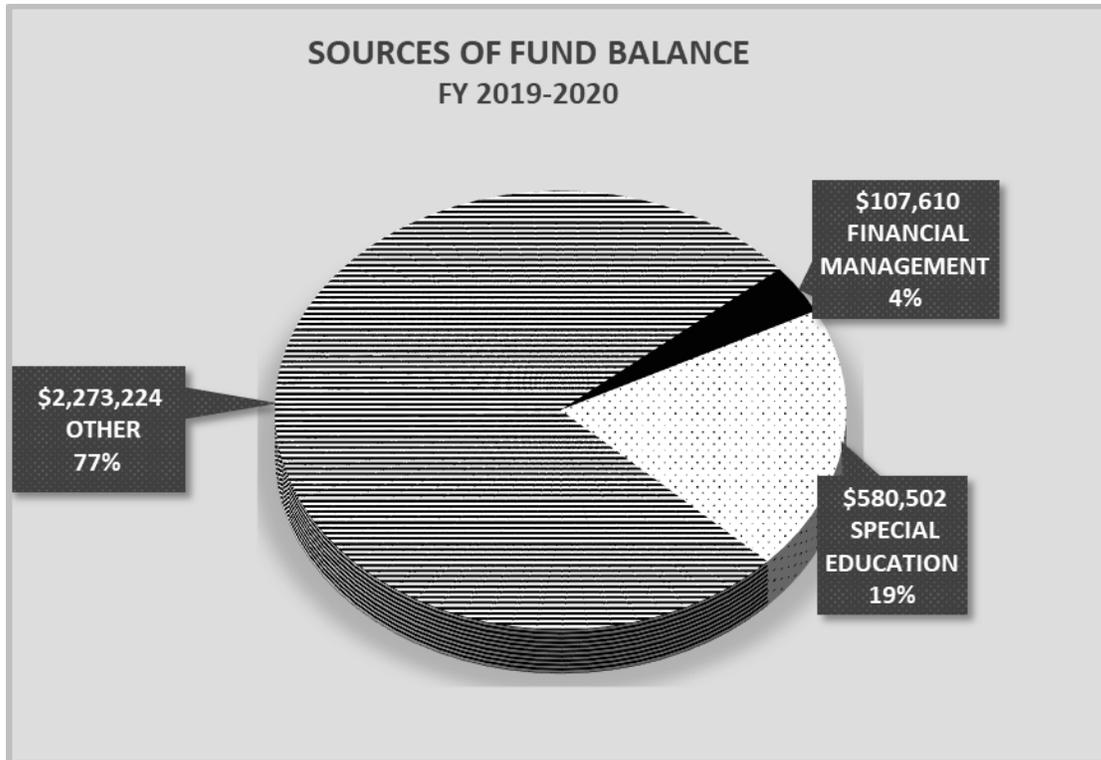
\$93,339 UTILITIES (OTHER): A mild winter combined with fuel cell operating properly to supply heat generated savings of \$17,731 FAV. Electricity usage was down due to the reduced occupancy in buildings, \$70,089 FAV.

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

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

\$38,170 COMMUNICATIONS: TEL, POST, ETC. (OTHER): Less copy paper, postage, toner and other Xerox supplies were needed during the remote instruction period. The District also received a grant for internet services.

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



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

1. **\$1,950,777** - Return of unspent fund balance per audit.
2. **\$ 495,482** – 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.

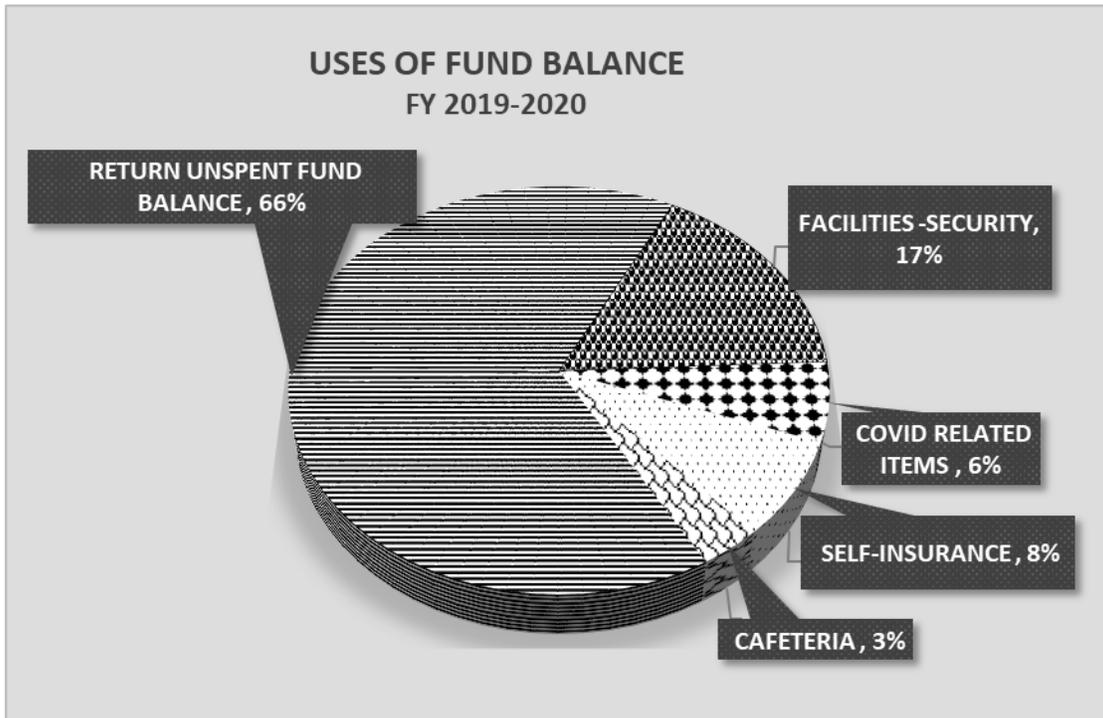
\$515,077 END OF YEAR PURCHASES (EOY):

\$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.

The uses of the fund balance are shown graphically below:



Return Unspent Fund Balance:

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

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

APPENDIX D

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 30th 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.

<i>Bethany</i>	<i>\$ 64,680</i>
<i>Orange</i>	<i>\$179,241</i>
<i>Woodbridge</i>	<i><u>\$108,444</u></i>
<i>Total</i>	<i>\$352,364</i>

The audited fund balance for 2020-2021 is \$2,483,748 after designating \$187,600 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: **\$ 1,858,818**

\$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.

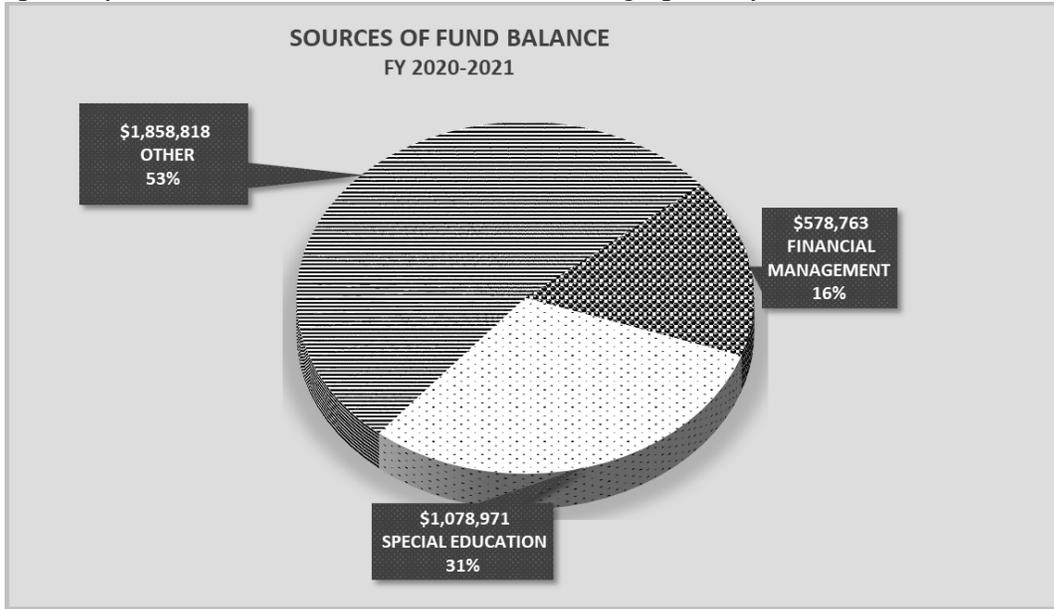
\$192,377 SUPPLIES: Instructional supplies and maintenance supplies were underbudget. The teaching staff adjusted purchases for remote and hybrid learning. \$96,980 was reimbursed through grants.

\$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 activities 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. Some of these savings were offset by COVID purchases.

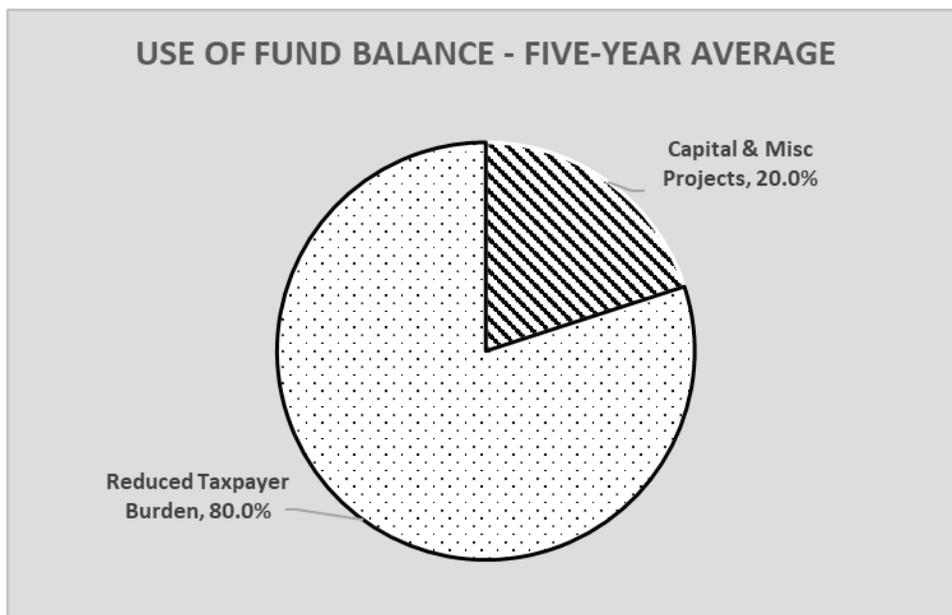
The primary sources of the fund balance are shown graphically below:



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:

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

APPENDIX E

RECAP OF 2021-2022

Unspent Encumbrances Balance:

The cancellation of 2020-2021 encumbrances of \$83,470 will be added to the fund balance carried forward for future budget offset. We encumber funds for goods and services received by June 30th 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.

The unaudited fund balance for 2021-2022 is \$523,678 plus \$1,033,963 designated for capital non-recurring projects. These source of the available funds are described below.

FINANCIAL MANAGEMENT:

\$ 363,859

Our efforts to foster a District culture of finding cost savings and efficiencies has been successful producing savings of \$25,376. Grant money was applied for and awarded to offset the cost of the CEN for savings of \$17,376. \$8,000 of maintenance work done by in-house staff rather than hiring contractors. The District saved \$132,839 on insurances by bidding contracts, utilizing self-insurance funding rather fully insured, switching to a 401(a) retirement plan, and fully funding OPEB. The District was not fully staffed the entire year and the many vacancies resulted in surplus, \$205,644. A portion of these funds were transferred to cover outside consultants to cover services, a portion of the funds were utilized in hiring more bench (internal) subs rather using and outside agency, and some funds remained unspent.

SPECIAL EDUCATION (NET)

\$ 883,882

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. A new program was established in FY22 for the middle school and its counterpart is budget for the high school in the FY23 school year. The Districts revenue derived from these changes in special education services decreased by \$182,187 which is not reflected above.

OTHER:

\$ 309,897

\$138,547 SALARIES (OTHER): "Turnover savings" from replacing teachers and other staff who retired or resigned is over budget and savings from unpaid leaves-of-absence. There were a significant vacancies during the year creating variances from the budget. The administration utilized many methods to address the vacancies including overtime,

temporary staff, and outside agencies. Some positions went unfilled for a period of time despite our recruitment efforts. The District was not fully staffed at any point during the school year. More in-house teaching substitutes were hired which reduced our costs with an outside agency and provided more stability. An outside agency was utilized to cover vacant para positions.

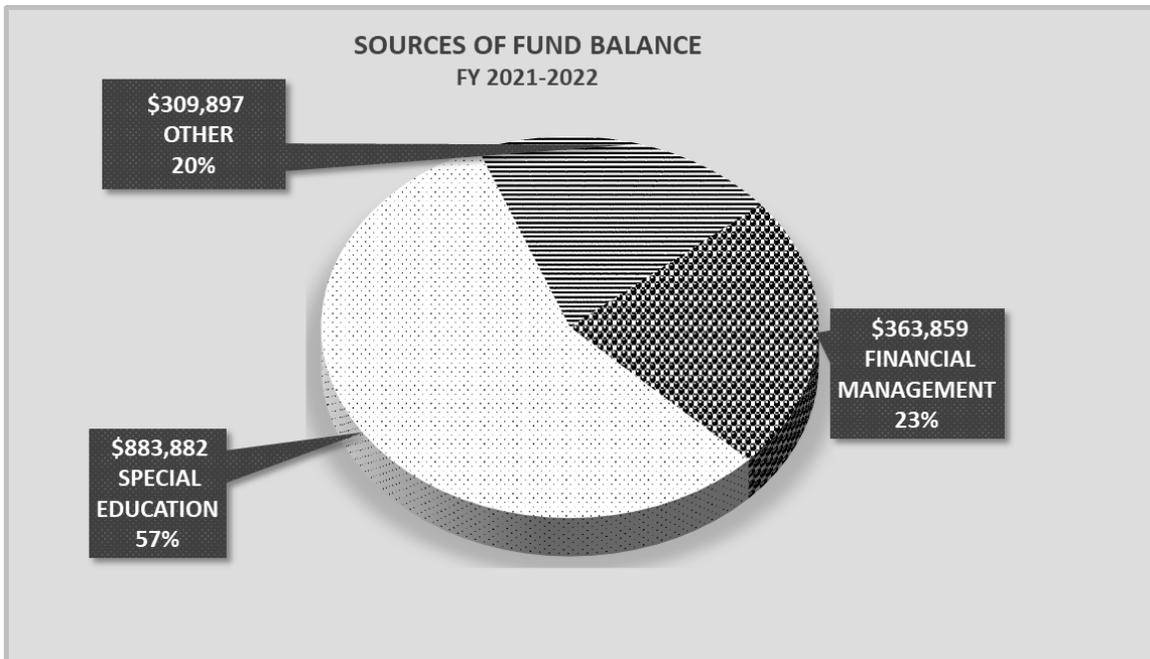
\$18,429 PURCHASED SERVICES (OTHER): Other purchased services accounts were under budget collectively by \$8,666 due to less printed materials and catered events. Data processing was under budget by \$9,763 as the administration consolidated onboarding software options at a reduced cost.

\$57,082 SUPPLIES (OTHER): Instructional supplies and transportation fuel were underbudget. Purchases for consumables was less than budgeted. Repairs and maintenance were overbudget but offset by utilities and maintenance supplies which were underbudget. These areas were reviewed during the 2022-2023 budget process and will be reviewed again during the upcoming budget process.

\$40,537 RENTALS (OTHER): Athletic rentals were down \$12,500 due to lower rentals of other facilities for teams to practice on all weather fields. Special education rental of lease space was \$28,000 lower than anticipated as the University of New Haven provided space gratis and Albertus Magnus did not have a second classroom available.

\$52,080 STAFF TRAVEL, CONFERENCES AND DUES & FEES (OTHER): Many conferences are held virtually as well as some in-district meetings. This results in lower registration fees and travel costs. Several students were award scholarships to attend conferences and contests offsetting the entrance fees..

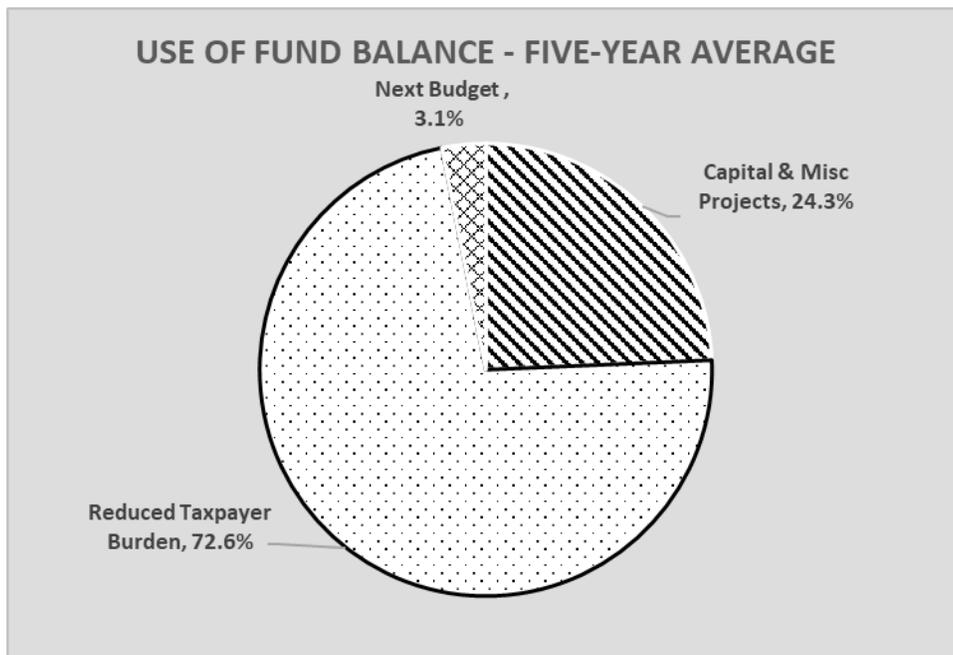
The primary sources of the fund balance are shown graphically below:



The use of the fund balance is proposed as follows:

1. **\$1,033,963** - designated to Capital Nonrecurring Reserve
2. **\$ 523,678** – Carry over of unspent fund balance upon audit completion.

The uses of the fund balance are shown graphically below:



Carry Over Funds:

Assuming the Board of Education approves 2% or \$1,033,963 of the FY22 surplus is transferred to the Capital Nonrecurring Reserve, the unaudited balance will be \$523,678. The FY21 unspent encumbrances and unspent funds from FY22 will be designated as carry over funds in FY23 to offset the next budget developed for FY24.

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	\$ (400.00)	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	\$ (133.00)	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	\$ (1,100.00)	add'l classes require keyboard
2022- Sept	11	01-11-1010-5611 INSTRUCTIONAL SUPPLIES	\$ 1,100.00	add'l classes require keyboard
2022- Sept	66	05-14-2350-5690 OTHER SUPPLIES	\$ 2,240.00	Upgrade SNAP Software
2022- Sept	66	01-13-2130-5690 OTHER SUPPLIES	\$ (746.67)	Upgrade SNAP Software
2022- Sept	66	02-13-2130-5690 OTHER SUPPLIES	\$ (746.67)	Upgrade SNAP Software
2022- Sept	66	03-13-2130-5690 OTHER SUPPLIES	\$ (746.66)	Upgrade SNAP Software
2022- Sept	356	03-11-3202-5420 REPAIRS,MAINTENANCE & CLEANING	\$ (995.00)	Swim Timing Purchase
2022- Sept	356	03-11-3202-5731 EQUIPMENT - REPLACEMENT	\$ 995.00	Swim Timing Purchase
2022- Sept	360	02-13-2400-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (1,250.00)	REPLACE WEIGHT ROOM FLOOR
2022- Sept	360	02-13-2400-5590 OTHER PURCHASED SERVICES	\$ (1,250.00)	REPLACE WEIGHT ROOM FLOOR
2022- Sept	360	02-13-2400-5420 REPAIRS,MAINTENANCE & CLEANING	\$ 2,500.00	REPLACE WEIGHT ROOM FLOOR
OCT				
2022- Oct	77	01-11-1007-5611 INSTRUCTIONAL SUPPLIES	\$ (65.00)	Health PD Transfer
2022- Oct	77	01-11-1007-5810 DUES & FEES	\$ 65.00	Health PD Transfer
2022- Oct	119	02-11-1010-5611 INSTRUCTIONAL SUPPLIES	\$ (900.00)	PURCHASE A KEYBOARD(MUSIC)
2022- Oct	119	02-11-1010-5730 EQUIPMENT - NEW	\$ 900.00	PURCHASE A KEYBOARD(MUSIC)
2022- Oct	130	05-14-2700-5512 VO-AG/VO-TECH REG ED	\$ 2,440.00	TRANSPORTATION NONNEWAUG HS
2022- Oct	130	05-14-2700-5513 IN DISTRICT PRIVATE REG ED	\$ (2,440.00)	TRANSPORTATION NONNEWAUG HS
2022- Oct	267	03-13-2400-5581 TRAVEL - CONFERENCES	\$ 600.00	PowerSchool Wrkshp-F. Barretta
2022- Oct	267	03-13-2400-5580 STAFF TRAVEL	\$ (600.00)	PowerSchool Wrkshp-F. Barretta
2022- Oct	329	02-13-2120-5590 OTHER PURCHASED SERVICES	\$ 75.00	STUDENT RECORD FILE FOLDERS
2022- Oct	329	02-13-2120-5581 TRAVEL - CONFERENCES	\$ (75.00)	STUDENT RECORD FILE FOLDERS
2022- Oct	384	01-11-1014-5810 DUES & FEES	\$ (100.00)	HISTORY CLASSROOM SUPPLIES
2022- Oct	384	01-11-1014-5611 INSTRUCTIONAL SUPPLIES	\$ 100.00	HISTORY CLASSROOM SUPPLIES
2022- Oct	441	05-13-2213-5611 INSTRUCTIONAL SUPPLIES	\$ (1,775.00)	11/2/21 PD Lunch
2022- Oct	441	05-13-2213-5590 OTHER PURCHASED SERVICES	\$ 1,775.00	11/2/21 PD Lunch
NOV				
2022- Nov	115	02-11-1006-5611 INSTRUCTIONAL SUPPLIES	\$ (277.00)	SPANISH CONFERENCE
2022- Nov	115	02-11-1006-5810 DUES & FEES	\$ 277.00	SPANISH CONFERENCE
2022- Nov	136	02-11-1005-5611 INSTRUCTIONAL SUPPLIES	\$ (1,309.00)	PURCHASE BOOKS
2022- Nov	136	02-11-1005-5641 TEXTBOOKS	\$ 1,309.00	PURCHASE BOOKS
DEC				
2022- Dec	86	01-11-1010-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (201.00)	amplifiers for music lab
2022- Dec	86	01-11-1010-5611 INSTRUCTIONAL SUPPLIES	\$ 201.00	amplifiers for music lab
2022- Dec	162	03-13-2400-5581 TRAVEL - CONFERENCES	\$ 825.00	Seminar for Miguel Pickering
2022- Dec	162	03-13-2400-5580 STAFF TRAVEL	\$ (825.00)	Seminar for Miguel Pickering
JAN				
2022-Jan	34	01-11-3201-5690 OTHER SUPPLIES	\$ (600.00)	Actor's Club - Play Production
2022-Jan	34	01-11-3201-5590 OTHER PURCHASED SERVICES	\$ 600.00	Actor's Club - Play Production
2022-Jan	153	02-13-2120-5330 PROF/TECH SERVICES	\$ (410.00)	Table rental-Career Fair
2022-Jan	153	02-13-2400-5440 RENTALS	\$ 410.00	Table rental-Career Fair
2022-Jan	167	05-13-2213-5611 INSTRUCTIONAL SUPPLIES	\$ (1,500.00)	Retirement & Yrs Serv Gifts
2022-Jan	167	05-13-2213-5690 OTHER SUPPLIES	\$ 1,500.00	Retirement & Yrs Serv Gifts
FEB				
2022-Feb	60	01-13-2400-5690 OTHER SUPPLIES	\$ (10.00)	Shipping
2022-Feb	60	01-13-2400-5550 COMMUNICATIONS	\$ 10.00	Shipping
2022-Feb	67	01-13-2220-5611 INSTRUCTIONAL SUPPLIES	\$ (996.00)	New laminator is needed
2022-Feb	67	01-13-2220-5330 PROF/TECH SERVICES	\$ (568.00)	New laminator is needed
2022-Feb	67	01-13-2220-5642 LIBRARY BOOKS	\$ (186.00)	New laminator is needed
2022-Feb	67	01-13-2220-5731 REPLACEMENT EQUIPMENT	\$ 1,750.00	New laminator is needed
2022-Feb	113	05-13-2212-5322 INSTRUCTIONAL PRG IMP	\$ (1,881.00)	3/18/22 Prof Dev Day Lunch
2022-Feb	113	05-13-2212-5590 OTHER PURCHASED SERVICES	\$ 1,881.00	3/18/22 Prof Dev Day Lunch
2022-Feb	213	02-14-2600-5613 CUSTODIAL SUPPLIES	\$ (630.00)	Fridge replacement
2022-Feb	213	02-14-2600-5731 REPLACEMENT EQUIPMENT	\$ 630.00	Fridge replacement
2022-Feb	234	03-14-2600-5420 REPAIR & MAINTENANCE	\$ (250.00)	U-haul rental
2022-Feb	234	03-14-2600-5440 RENTALS-LAND,BLDG,EQUIPMENT	\$ 250.00	U-haul rental
2022-Feb	236	03-11-1016-5611 INSTRUCTIONAL SUPPLIES	\$ (478.00)	Bookcases for Reading Dept.
2022-Feb	236	03-11-1016-5690 OTHER SUPPLIES	\$ 478.00	Bookcases for Reading Dept.

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

MONTH/YR	JNL#	ACCOUNT NUMBER & DESCRIPTION	AMOUNT	DESCRIPTION
MAR				
2022-Mar	39	02-13-2220-5690 OTHER SUPPLIES	\$ (850.00)	Purch. Books & Periodicals
2022-Mar	39	02-13-2220-5642 LIBRARY BOOKS	\$ 850.00	Purch. Books & Periodicals
2022-Mar	40	03-11-1001-5810 DUES & FEES	\$ (290.00)	for outside PD ART 7-12
2022-Mar	40	03-11-1001-5581 TRAVEL - CONFERENCES	\$ 290.00	workshops for new programs
2022-Mar	40	03-11-1001-5611 INSTRUCTIONAL SUPPLIES	\$ (105.00)	for outside PD ART 7-12
2022-Mar	40	03-11-1001-5581 TRAVEL - CONFERENCES	\$ 105.00	workshops for new programs
2022-Mar	53	01-11-1014-5611 INSTRUCTIONAL SUPPLIES	\$ (1,350.00)	History Workshop funding
2022-Mar	53	01-11-1014-5330 PROF/TECH SERVICES	\$ 1,350.00	History Workshop funding
2022-Mar	78	03-11-1008-5810 DUES & FEES	\$ (540.00)	not competing this year-TSA
2022-Mar	78	03-11-1008-5611 INSTRUCTIONAL SUPPLIES	\$ 540.00	not competing this year-TSA
2022-Mar	104	03-11-1001-5420 REPAIR & MAINTENANCE	\$ (500.00)	norepairedneeded
2022-Mar	104	03-11-1001-5611 INSTRUCTIONAL SUPPLIES	\$ 500.00	money canbe used for supplies
2022-Mar	122	02-13-2220-5642 LIBRARY BOOKS	\$ (105.00)	ALA Membership Renewal
2022-Mar	122	02-13-2220-5330 PROF/TECH SERVICES	\$ (9.00)	ALA Membership Renewal
2022-Mar	122	02-13-2220-5810 DUES & FEES	\$ 114.00	ALA Membership Renewal
2022-Mar	123	02-13-2220-5330 PROF/TECH SERVICES	\$ (149.00)	Social Studies Kit
2022-Mar	123	02-13-2220-5611 INSTRUCTIONAL SUPPLIES	\$ 149.00	Social Studies Kit
2022-Mar	127	03-11-1011-5330 PROF/TECH SERVICES	\$ (197.01)	move to instructional supplies
2022-Mar	127	03-11-1011-5611 INSTRUCTIONAL SUPPLIES	\$ 197.01	move to instructional supplies
2022-Mar	132	03-11-1001-5730 EQUIPMENT - NEW	\$ (125.00)	forNAEAduesMattFletcher
2022-Mar	132	03-11-1001-5810 DUES & FEES	\$ 125.00	no equipment neededatthistime
2022-Mar	144	01-13-2120-5330 PROF/TECH SERVICES	\$ (1,190.00)	AFRICAN HISTORY PRESENTATION
2022-Mar	144	01-11-1014-5611 INSTRUCTIONAL SUPPLIES	\$ (1,285.00)	AFRICAN HISTORY PRESENTATION
2022-Mar	144	01-11-1014-5330 PROF/TECH SERVICES	\$ 2,475.00	AFRICAN HISTORY PRESENTATION
2022-Mar	145	03-11-1010-5420 REPAIR & MAINTENANCE	\$ (1,300.00)	cello unrepairable
2022-Mar	145	03-11-1010-5731 EQUIPMENT - REPLACEMENT	\$ 1,300.00	cello unrepairable
2022-Mar	161	03-11-1010-5810 DUES & FEES	\$ (154.00)	dues not needed
2022-Mar	161	03-11-1010-5611 INSTRUCTIONAL SUPPLIES	\$ 154.00	add'tl supplies needed
2022-Mar	169	05-13-2213-5690 OTHER SUPPLIES	\$ (300.00)	3/18/22 PL Day Refreshments
2022-Mar	169	05-13-2213-5590 OTHER PURCHASED SERVICES	\$ 300.00	3/18/22 PL Day Refreshments
2022-Mar	170	05-13-2213-5690 OTHER SUPPLIES	\$ (265.00)	Dept. PD Lunch 3/16/22
2022-Mar	170	05-13-2213-5590 OTHER PURCHASED SERVICES	\$ 265.00	Dept. PD Lunch 3/16/22
2022-Mar	172	01-13-2120-5611 INSTRUCTIONAL SUPPLIES	\$ (30.00)	Conference CSCA Registration
2022-Mar	172	01-13-2120-5810 DUES & FEES	\$ 30.00	Conference CSCA Registration
2022-Mar	176	03-13-2220-5690 OTHER SUPPLIES	\$ (585.42)	library book purchase
2022-Mar	176	03-13-2220-5642 LIBRARY BOOKS	\$ 585.42	library book purchase
2022-Mar	181	05-14-2700-5513 TRANSPORTATION	\$ (1,500.00)	TRANSFER FOR PPS FURNITURE
2022-Mar	181	04-13-2190-5730 EQUIPMENT - NEW	\$ 1,500.00	TRANSFER FOR PPS FURNITURE
2022-Mar	184	03-11-1009-5690 OTHER SUPPLIES	\$ (300.00)	Fee for Mu Alpha Field Trip
2022-Mar	184	03-11-1009-5810 DUES & FEES	\$ 300.00	Fee for Mu Alpha Field Trip
2022-Mar	191	03-13-2220-5810 DUES & FEES	\$ (322.76)	Supplies for book covers/tape
2022-Mar	191	03-13-2220-5611 INSTRUCTIONAL SUPPLIES	\$ 322.76	Supplies for book covers/tape
2022-Mar	199	03-11-1001-5420 REPAIR & MAINTENANCE	\$ (157.88)	art classroom supplies
2022-Mar	199	03-11-1001-5611 INSTRUCTIONAL SUPPLIES	\$ 157.88	art classroom supplies
2022-Mar	205	03-13-2130-5690 OTHER SUPPLIES	\$ (125.00)	CT NURSE CONFERENCE
2022-Mar	205	03-13-2130-5810 DUES & FEES	\$ 125.00	CT NURSE CONFERENCE
2022-Mar	221	03-13-2130-5810 DUES & FEES	\$ 700.00	Contract Course Reimbursement
2022-Mar	221	05-14-2320-5810 DUES & FEES	\$ (700.00)	Contract Course Reimbursement
APR				
2022-Apr	4	01-11-1011-5420 REPAIR & MAINTENANCE	\$ (1,000.00)	Instructional Sport Supplies
2022-Apr	4	01-11-1011-5611 INSTRUCTIONAL SUPPLIES	\$ 1,000.00	Instructional Sport Supplies
2022-Apr	5	02-11-1008-5420 REPAIR & MAINTENANCE	\$ (30.00)	TO PURCHASE LEGO/ROBOT SET
2022-Apr	5	02-11-1008-5611 INSTRUCTIONAL SUPPLIES	\$ 30.00	TO PURCHASE LEGO/ROBOT SET
2022-Apr	30	03-11-1005-5611 INSTRUCTIONAL SUPPLIES	\$ 300.00	document cameras for English
2022-Apr	30	03-11-1005-5641 TEXTBOOKS & DIGITAL RESOURCE	\$ (300.00)	document cameras for English
2022-Apr	34	03-13-2400-5580 TRAVEL	\$ (1,900.00)	transfer-conference AP GOV
2022-Apr	34	03-13-2400-5581 TRAVEL - CONFERENCES	\$ 1,900.00	transfer-conference AP GOV
2022-Apr	39	03-11-1011-5611 INSTRUCTIONAL SUPPLIES	\$ (400.00)	trnsfr-fitness equipment repr
2022-Apr	39	03-13-2400-5420 REPAIR & MAINTENANCE	\$ 400.00	trnsfr-fitness equipment repr
2022-Apr	50	02-13-2120-5690 OTHER SUPPLIES	\$ (159.00)	FOR CHARACTER ED. SUPPLIES
2022-Apr	50	02-13-2120-5611 INSTRUCTIONAL SUPPLIES	\$ 159.00	FOR CHARACTER ED. SUPPLIES
2022-Apr	51	02-13-2220-5330 PURCHASED SERVICES	\$ (144.00)	Audible Software for Kindles
2022-Apr	51	02-13-2220-5690 OTHER SUPPLIES	\$ 144.00	Audible Software for Kindles

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

<u>MONTH/YR</u>	<u>JNL#</u>	<u>ACCOUNT NUMBER & DESCRIPTION</u>	<u>AMOUNT</u>	<u>DESCRIPTION</u>
2022-Apr	58	01-11-1010-5330 PROF/TECH SERVICES	\$ (317.00)	Supplies for Spring Concert
2022-Apr	58	01-11-1010-5611 INSTRUCTIONAL SUPPLIES	\$ 317.00	Supplies for Spring Concert
2022-Apr	59	01-13-2220-5642 LIBRARY BOOKS	\$ (310.00)	Movie Field Trip Transportatio
2022-Apr	59	01-13-2220-5330 PROF/TECH SERVICES	\$ 310.00	Movie Field Trip Transportatio
2022-Apr	66	02-13-2400-5330 PROF/TECH SERVICES	\$ 1,100.00	TO PURCHASE STAFF APPREC.ITEM
2022-Apr	66	02-14-2219-5611 INSTRUCTIONAL SUPPLIES	\$ (1,100.00)	TO PURCHASE STAFF APPREC.ITEM
2022-Apr	180	02-14-2219-5611 INSTRUCTIONAL SUPPLIES	\$ (600.00)	STAFF APPRECIATION GIFTS
2022-Apr	180	02-13-2400-5330 PROF/TECH SERVICES	\$ 600.00	STAFF APPRECIATION GIFTS
2022-Apr	241	01-11-1016-5611 INSTRUCTIONAL SUPPLIES	\$ (165.00)	Spanish/English version books
2022-Apr	241	01-11-1016-5690 OTHER SUPPLIES	\$ (5.00)	Spanish/English version books
2022-Apr	241	01-11-1016-5810 DUES & FEES	\$ (168.00)	Spanish/English version books
2022-Apr	241	01-11-1016-5641 TEXTBOOKS & DIGITAL RESOURCES	\$ 338.00	Spanish/English version books
2022-Apr	365	05-13-2213-5581 TRAVEL-CONFERENCES	\$ (258.00)	Awards of Excellence
2022-Apr	365	05-13-2213-5690 OTHER SUPPLIES	\$ 258.00	Awards of Excellence
2022-Apr	431	05-14-2675-5440 RENTAL	\$ 2,681.71	POD Rentals for furniture
2022-Apr	431	05-14-2675-5590 OTHER PURCHASED SERVICES	\$ 148.50	KN95 Masks
2022-Apr	431	05-14-2675-5613 CUSTODIAL SUPPLIES	\$ (2,830.21)	POD Rentals & KN95 Masks
MAY				
2022-May	106	03-11-1013-5810 DUES & FEES	\$ (1,200.00)	2 AP Training
2022-May	106	03-11-1013-5581 TRAVEL-CONFERENCES	\$ 1,200.00	2 AP Training
2022-May	124	01-13-2400-5581 TRAVEL-CONFERENCES	\$ (1,234.00)	Teacher Appreciation supplies
2022-May	124	01-13-2400-5690 OTHER SUPPLIES	\$ 1,234.00	Teacher Appreciation supplies
2022-May	125	01-11-1009-5611 INSTRUCTIONAL SUPPLIES	\$ (843.00)	Year End Student Activates
2022-May	125	01-14-2219-5690 OTHER SUPPLIES	\$ 843.00	Year End Student Activaties
2022-May	126	01-11-1015-5810 DUES & FEES	\$ (550.00)	Wood and other supplies neede
2022-May	126	01-11-1015-5611 INSTRUCTIONAL SUPPLIES	\$ (585.00)	Wood and other supplies neede
2022-May	126	01-11-1008-5611 INSTRUCTIONAL SUPPLIES	\$ 1,135.00	Wood and other supplies neede
2022-May	402	03-13-2120-5330 PROF/TECH SERVICES	\$ 240.00	PD SPEAKER
2022-May	402	03-13-2120-5581 TRAVEL-CONFERENCES	\$ (240.00)	reimb lunch PD Day
2022-May	407	05-13-2213-5581 TRAVEL-CONFERENCES	\$ (265.00)	reimb lunch PD Day
2022-May	407	05-13-2213-5690 OTHER SUPPLIES	\$ 265.00	New Titles Requested
2022-May	416	02-13-2220-5330 PROF/TECH SERVICES	\$ (698.00)	New Titles Requested
2022-May	416	02-13-2220-5642 LIBRARY BOOKS	\$ 698.00	Eversource 260064
2022-May	435	03-11-1009-5611 INSTRUCTIONAL SUPPLIES	\$ 1,563.00	Freckle Math Student Subscript
2022-May	435	03-11-1013-5611 INSTRUCTIONAL SUPPLIES	\$ (1,563.00)	Freckle Math Student Subscript
2022-May	437	03-11-1001-5581 TRAVEL-CONFERENCES	\$ (700.00)	from conference to instruction
2022-May	437	03-11-1001-5611 INSTRUCTIONAL SUPPLIES	\$ 700.00	for much needed tools
2022-May	476	01-11-1006-5611 INSTRUCTIONAL SUPPLIES	\$ (436.00)	Phys Ed supplies new unit
2022-May	476	01-11-1006-5810 DUES & FEES	\$ (850.00)	Phys Ed supplies new unit
2022-May	476	01-13-2220-5642 LIBRARY BOOKS	\$ (139.00)	Phys Ed supplies new unit
2022-May	476	01-13-2400-5330 PROF/TECH SERVICES	\$ (185.00)	Phys Ed supplies new unit
2022-May	476	01-11-1011-5730 EQUIPMENT-NEW	\$ 1,610.00	Phys Ed supplies new unit
2022-May	483	01-14-2600-5613 CUSTODIAL SUPPLIES	\$ (582.00)	vac new
2022-May	483	01-14-2600-5730 EQUIPMENT-NEW	\$ 582.00	vac new
2022-May	487	04-12-2151-5690 OTHER SUPPLIES	\$ (2,200.00)	NASP prepare training
2022-May	487	04-13-2140-5690 OTHER SUPPLIES	\$ 2,200.00	NASP prepare training
2022-May	495	04-13-2140-5810 DUES & FEES	\$ (26.00)	to purchase materials
2022-May	495	04-13-2140-5611 INSTRUCTIONAL SUPPLIES	\$ 26.00	to purchase materials
2022-May	496	04-13-2140-5690 OTHER SUPPLIES	\$ (48.24)	to purchase materials
2022-May	496	04-13-2140-5611 INSTRUCTIONAL SUPPLIES	\$ 48.24	to purchase materials
JUNE '2022				
2022-June	2	1 -01-13-2400-5581 TRAVEL - CONFERENCES	\$ (1,326.00)	Copy paper needed for school
2022-June	2	1 -01-14-2219-5611 INSTRUCTIONAL SUPPLIES	\$ 1,326.00	Copy paper needed for school
2022-June	3	1 -01-11-1013-5510 PUPIL TRANSPORTATION	\$ (600.00)	School graduation supplies
2022-June	3	1 -01-13-2120-5690 OTHER SUPPLIES	\$ (233.00)	School graduation supplies
2022-June	3	1 -01-14-2219-5690 OTHER SUPPLIES	\$ 833.00	School graduation supplies
2022-June	87	1 -01-14-2600-5613 MAINTENANCE/CUSTODIAL SUPPLIES	\$ (2,988.00)	ASPHALT REPAIRS
2022-June	87	1 -01-14-2600-5420 REPAIRS,MAINTENANCE & CLEANING	\$ 2,988.00	ASPHALT REPAIRS

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

MONTH/YR	JNL#	ACCOUNT NUMBER & DESCRIPTION	AMOUNT	DESCRIPTION
2022-June	88	1 -02-14-2600-5420 REPAIRS,MAINTENANCE & CLEANING	\$ (1,258.00)	ASPHALT REPAIRS
2022-June	88	1 -02-14-2600-5720 IMPROVEMTNS TO SITES	\$ 1,258.00	ASPHALT REPAIRS
2022-June	113	1 -05-13-2213-5581 TRAVEL - CONFERENCES	\$ (2,600.00)	K&M Literacy
2022-June	113	1 -05-13-2212-5322 INSTRUCTIONAL PROG IMPROVEMENT	\$ 2,600.00	K&M Literacy
2022-June	127	1 -05-14-2660-5330 OTHER PROFESSIONAL & TECH SRVC	\$ 694.94	SIP Trunks
2022-June	127	1 -05-14-2660-5715 IMPROVEMENTS TO BUILDINGS	\$ (694.94)	SIP Trunks
2022-June	127	1 -05-14-2660-5731 EQUIPMENT - REPLACEMENT	\$ 430.06	Network Video Store Station
2022-June	127	1 -05-14-2660-5715 IMPROVEMENTS TO BUILDINGS	\$ (430.06)	Network Video Store Station
2022-June	134	1 -05-14-2350-5690 OTHER SUPPLIES	\$ 2,715.00	Tablets Advance Computer Class
2022-June	134	1 -03-11-1009-5611 INSTRUCTIONAL SUPPLIES	\$ (1,698.62)	Tablets Advance Computer Class
2022-June	134	1 -03-14-2219-5611 INSTRUCTIONAL SUPPLIES	\$ (1,016.38)	Tablets Advance Computer Class
2022-June	180	1 -05-14-2350-5330 OTHER PROFESSIONAL & TECH SRVC	\$ 2,741.40	1:1 lease payment shortage
2022-June	180	1 -05-14-2350-5730 EQUIPMENT - NEW	\$ (1,491.40)	1:1 lease payment shortage
2022-June	180	1 -05-14-2350-5731 EQUIPMENT - REPLACEMENT	\$ (650.00)	1:1 lease payment shortage
2022-June	180	1 -05-14-2350-5810 DUES & FEES	\$ (600.00)	1:1 lease payment shortage
2022-June	225	1 -01-14-2219-5611 INSTRUCTIONAL SUPPLIES	\$ (266.00)	Book Order Shipping fees
2022-June	225	1 -01-11-1006-5611 INSTRUCTIONAL SUPPLIES	\$ 266.00	Book Order Shipping fees
2022-June	228	1 -01-14-2219-5611 INSTRUCTIONAL SUPPLIES	\$ (584.00)	T-shirts "NO PLACE FOR HATE"
2022-June	228	1 -01-14-2219-5690 OTHER SUPPLIES	\$ 584.00	T-shirts "NO PLACE FOR HATE"
2022-June	230	1 -01-14-2219-5611 INSTRUCTIONAL SUPPLIES	\$ (1,639.00)	Supplies- year end activities
2022-June	230	1 -01-14-2219-5690 OTHER SUPPLIES	\$ 1,639.00	Supplies for school activities
2022-June	250	1 -01-11-1001-5810 DUES & FEES	\$ (200.00)	Copy paper needed for school-
2022-June	250	1 -01-11-1005-5611 INSTRUCTIONAL SUPPLIES	\$ (388.00)	Copy paper needed for school-
2022-June	250	1 -01-11-1005-5690 OTHER SUPPLIES	\$ (347.00)	Copy paper needed for school-
2022-June	250	1 -01-11-1007-5611 INSTRUCTIONAL SUPPLIES	\$ (160.00)	Copy paper needed for school-
2022-June	250	1 -01-14-2219-5611 INSTRUCTIONAL SUPPLIES	\$ 1,095.00	Copy paper needed for school-
2022-June	251	1 -01-13-2130-5810 DUES & FEES	\$ (140.00)	Ice Packs & other supplies
2022-June	251	1 -01-13-2130-5581 TRAVEL - CONFERENCES	\$ (140.00)	Ice Packs & other supplies
2022-June	251	1 -01-13-2130-5690 OTHER SUPPLIES	\$ 280.00	Ice Packs & other supplies
2022-June	290	1 -03-11-1009-5611 INSTRUCTIONAL SUPPLIES	\$ 1,563.00	Math Computer Software
2022-June	290	1 -03-11-1013-5611 INSTRUCTIONAL SUPPLIES	\$ (1,563.00)	Math Computer Software
2022-June	318	1 -05-13-2213-5581 TRAVEL - CONFERENCES	\$ (1,544.00)	K&M Literacy
2022-June	318	1 -05-13-2213-5580 STAFF TRAVEL	\$ (695.00)	K&M Literacy
2022-June	318	1 -05-13-2213-5322 INSTRUCTIONAL PROG IMPROVEMENT	\$ 2,239.00	K&M Literacy
2022-June	327	1 -01-14-2600-5715 IMPROVEMENTS TO BUILDINGS	\$ 1,820.00	Correct Acct JE 2022-12-277
2022-June	327	1 -01-14-2600-5410 UTILITIES, EXCLUDING HEAT	\$ (1,820.00)	Correct Acct JE 2022-12-277
2022-June	351	1 -04-13-2140-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (250.00)	Desk for Psychologist
2022-June	351	1 -04-13-2140-5690 OTHER SUPPLIES	\$ 250.00	Desk for Psychologist
2022-June	352	1 -03-14-2600-5420 REPAIRS,MAINTENANCE & CLEANING	\$ (2,997.00)	Hillview Prop Maint Tree rmvl
2022-June	352	1 -01-14-2600-5420 REPAIRS,MAINTENANCE & CLEANING	\$ 2,997.00	Hillview Prop Maint Tree rmvl
2022-June	354	1 -01-14-2600-5410 UTILITIES, EXCLUDING HEAT	\$ (2,373.00)	asphalt patching
2022-June	354	1 -01-14-2600-5420 REPAIRS,MAINTENANCE & CLEANING	\$ 2,373.00	asphalt patching
2022-June	365	1 -05-14-2660-5730 EQUIPMENT - NEW	\$ 2,000.00	Security Equipment MS Guards
2022-June	365	1 -05-14-2320-5810 DUES & FEES	\$ (2,000.00)	Security Equipment MS Guards
2022-June	375	1 -03-11-1011-5330 OTHER PROFESSIONAL & TECH SRVC	\$ 2,235.00	AHS PE Professional Developmen
2022-June	375	1 -03-13-2400-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (2,235.00)	AHS PE Professional Developmen
2022-June	402	1 -03-11-1006-5690 OTHER SUPPLIES	\$ 2,500.00	Book Carts for WL
2022-June	402	1 -03-11-1013-5611 INSTRUCTIONAL SUPPLIES	\$ (2,500.00)	Book Carts for WL
2022-June	555	1 -04-12-1203-5112 CLASSIFIED SALARIES	\$ 86,822.00	EOY FY22 Budget Transfer
2022-June	555	1 -03-11-1027-5111 CERTIFIED SALARIES	\$ 86,329.00	EOY FY22 Budget Transfer
2022-June	555	1 -01-11-1016-5111 CERTIFIED SALARIES	\$ 59,789.00	EOY FY22 Budget Transfer
2022-June	555	1 -04-12-1206-5111 CERTIFIED SALARIES	\$ 58,856.00	EOY FY22 Budget Transfer
2022-June	555	1 -04-12-1206-5112 CLASSIFIED SALARIES	\$ 45,264.00	EOY FY22 Budget Transfer
2022-June	555	1 -03-13-2110-5111 CERTIFIED SALARIES	\$ 44,081.00	EOY FY22 Budget Transfer
2022-June	555	1 -01-13-2140-5111 CERTIFIED SALARIES	\$ 38,931.00	EOY FY22 Budget Transfer
2022-June	555	1 -05-14-2510-5521 GENERAL LIABILITY INSURANCE	\$ 33,140.00	EOY FY22 Budget Transfer
2022-June	555	1 -01-13-2110-5111 CERTIFIED SALARIES	\$ 32,776.00	EOY FY22 Budget Transfer
2022-June	555	1 -05-15-1026-5112 CLASSIFIED SALARIES	\$ 28,552.00	EOY FY22 Budget Transfer
2022-June	555	1 -02-14-2600-5112 CLASSIFIED SALARIES	\$ 27,047.00	EOY FY22 Budget Transfer
2022-June	555	1 -03-15-2601-5111 CERTIFIED SALARIES	\$ 25,609.00	EOY FY22 Budget Transfer
2022-June	555	1 -05-13-2213-5111 CERTIFIED SALARIES	\$ 25,470.00	EOY FY22 Budget Transfer
2022-June	555	1 -03-11-3202-5111 CERTIFIED SALARIES	\$ 25,421.00	EOY FY22 Budget Transfer
2022-June	555	1 -03-11-1009-5111 CERTIFIED SALARIES	\$ 25,135.00	EOY FY22 Budget Transfer
2022-June	555	1 -02-13-2110-5111 CERTIFIED SALARIES	\$ 25,018.00	EOY FY22 Budget Transfer
2022-June	555	1 -01-11-1001-5111 CERTIFIED SALARIES	\$ 24,022.00	EOY FY22 Budget Transfer
2022-June	555	1 -05-14-2700-5510 PUPIL TRANSPORTATION	\$ 21,214.00	EOY FY22 Budget Transfer
2022-June	555	1 -01-14-2600-5112 CLASSIFIED SALARIES	\$ 18,902.00	EOY FY22 Budget Transfer

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MONTH/YR	JNL#	ACCOUNT NUMBER & DESCRIPTION	AMOUNT	DESCRIPTION
2022-June	555	1 -01-13-2400-5112 CLASSIFIED SALARIES	\$ 17,423.00	EOY FY22 Budget Transfer
2022-June	555	1 -02-12-2150-5111 CERTIFIED SALARIES	\$ 17,345.00	EOY FY22 Budget Transfer
2022-June	555	1 -01-11-1009-5111 CERTIFIED SALARIES	\$ 14,263.00	EOY FY22 Budget Transfer
2022-June	555	1 -03-13-2130-5112 CLASSIFIED SALARIES	\$ 12,413.00	EOY FY22 Budget Transfer
2022-June	555	1 -03-13-2400-5112 CLASSIFIED SALARIES	\$ 11,826.00	EOY FY22 Budget Transfer
2022-June	555	1 -01-15-2601-5111 CERTIFIED SALARIES	\$ 11,523.00	EOY FY22 Budget Transfer
2022-June	555	1 -04-12-1203-5111 CERTIFIED SALARIES	\$ 11,302.00	EOY FY22 Budget Transfer
2022-June	555	1 -04-15-1204-5111 CERTIFIED SALARIES	\$ 10,274.00	EOY FY22 Budget Transfer
2022-June	555	1 -04-13-2190-5112 CLASSIFIED SALARIES	\$ 6,371.00	EOY FY22 Budget Transfer
2022-June	555	1 -02-13-2130-5112 CLASSIFIED SALARIES	\$ 6,292.00	EOY FY22 Budget Transfer
2022-June	555	1 -02-14-2600-5621 NATURAL GAS	\$ 6,278.00	EOY FY22 Budget Transfer
2022-June	555	1 -01-12-2150-5111 CERTIFIED SALARIES	\$ 5,124.00	EOY FY22 Budget Transfer
2022-June	555	1 -03-11-1011-5111 CERTIFIED SALARIES	\$ 4,886.00	EOY FY22 Budget Transfer
2022-June	555	1 -03-11-1005-5111 CERTIFIED SALARIES	\$ 4,329.00	EOY FY22 Budget Transfer
2022-June	555	1 -02-11-1010-5111 CERTIFIED SALARIES	\$ 4,253.00	EOY FY22 Budget Transfer
2022-June	555	1 -02-11-1027-5111 CERTIFIED SALARIES	\$ 4,110.00	EOY FY22 Budget Transfer
2022-June	555	1 -01-13-2130-5112 CLASSIFIED SALARIES	\$ 4,019.00	EOY FY22 Budget Transfer
2022-June	555	1 -05-14-2320-5112 CLASSIFIED SALARIES	\$ 3,780.00	EOY FY22 Budget Transfer
2022-June	555	1 -05-15-1026-5111 CERTIFIED SALARIES	\$ 3,625.00	EOY FY22 Budget Transfer
2022-June	555	1 -02-14-2600-5613 MAINTENANCE/CUSTODIAL SUPPLIES	\$ 2,704.00	EOY FY22 Budget Transfer
2022-June	555	1 -05-14-2320-5550 COMMUNICATIONS: TEL,POST,ETC.	\$ 2,587.00	EOY FY22 Budget Transfer
2022-June	555	1 -02-13-2120-5112 CLASSIFIED SALARIES	\$ 2,085.00	EOY FY22 Budget Transfer
2022-June	555	1 -01-13-2400-5550 COMMUNICATIONS: TEL,POST,ETC.	\$ 1,999.00	EOY FY22 Budget Transfer
2022-June	555	1 -05-14-2350-5581 TRAVEL - CONFERENCES	\$ 1,746.00	EOY FY22 Budget Transfer
2022-June	555	1 -03-13-2120-5112 CLASSIFIED SALARIES	\$ 1,706.00	EOY FY22 Budget Transfer
2022-June	555	1 -02-11-1014-5111 CERTIFIED SALARIES	\$ 1,535.00	EOY FY22 Budget Transfer
2022-June	555	1 -02-13-2400-5550 COMMUNICATIONS: TEL,POST,ETC.	\$ 1,174.00	EOY FY22 Budget Transfer
2022-June	555	1 -05-14-2700-5512 VO-AG/VO-TECH REG ED	\$ 1,076.00	EOY FY22 Budget Transfer
2022-June	555	1 -02-13-2400-5111 CERTIFIED SALARIES	\$ 968.00	EOY FY22 Budget Transfer
2022-June	555	1 -01-13-2220-5112 CLASSIFIED SALARIES	\$ 654.00	EOY FY22 Budget Transfer
2022-June	555	1 -02-14-2600-5420 REPAIRS,MAINTENANCE & CLEANING	\$ 645.00	EOY FY22 Budget Transfer
2022-June	555	1 -02-11-3202-5330 OTHER PROFESSIONAL & TECH SRVC	\$ 475.00	EOY FY22 Budget Transfer
2022-June	555	1 -02-13-2220-5690 OTHER SUPPLIES	\$ 382.00	EOY FY22 Budget Transfer
2022-June	555	1 -03-11-1006-5641 TEXTBOOKS	\$ 322.00	EOY FY22 Budget Transfer
2022-June	555	1 -05-14-2510-5690 OTHER SUPPLIES	\$ 258.00	EOY FY22 Budget Transfer
2022-June	555	1 -01-13-2220-5690 OTHER SUPPLIES	\$ 221.00	EOY FY22 Budget Transfer
2022-June	555	1 -04-13-2190-5590 OTHER PURCHASED SERVICES	\$ 213.00	EOY FY22 Budget Transfer
2022-June	555	1 -01-13-2400-5580 STAFF TRAVEL	\$ 213.00	EOY FY22 Budget Transfer
2022-June	555	1 -02-11-3202-5690 OTHER SUPPLIES	\$ 201.00	EOY FY22 Budget Transfer
2022-June	555	1 -05-14-2675-5440 RENTALS-LAND,BLDG,EQUIPMENT	\$ 152.00	EOY FY22 Budget Transfer
2022-June	555	1 -05-14-2350-5420 REPAIRS,MAINTENANCE & CLEANING	\$ 151.00	EOY FY22 Budget Transfer
2022-June	555	1 -03-13-2120-5581 TRAVEL - CONFERENCES	\$ 142.00	EOY FY22 Budget Transfer
2022-June	555	1 -01-13-2120-5112 CLASSIFIED SALARIES	\$ 140.00	EOY FY22 Budget Transfer
2022-June	555	1 -05-13-2213-5581 TRAVEL - CONFERENCES	\$ 125.00	EOY FY22 Budget Transfer
2022-June	555	1 -03-13-2400-5580 STAFF TRAVEL	\$ 120.00	EOY FY22 Budget Transfer
2022-June	555	1 -03-13-2220-5611 INSTRUCTIONAL SUPPLIES	\$ 100.00	EOY FY22 Budget Transfer
2022-June	555	1 -02-13-2220-5642 LIBRARY BOOKS & PERIODICALS	\$ 92.00	EOY FY22 Budget Transfer
2022-June	555	1 -02-11-1006-5611 INSTRUCTIONAL SUPPLIES	\$ 90.00	EOY FY22 Budget Transfer
2022-June	555	1 -05-14-2350-5111 CERTIFIED SALARIES	\$ 77.00	EOY FY22 Budget Transfer
2022-June	555	1 -05-14-2310-5690 OTHER SUPPLIES	\$ 65.00	EOY FY22 Budget Transfer
2022-June	555	1 -02-11-3202-5440 RENTALS-LAND,BLDG,EQUIPMENT	\$ 60.00	EOY FY22 Budget Transfer
2022-June	555	1 -01-13-2120-5611 INSTRUCTIONAL SUPPLIES	\$ 53.00	EOY FY22 Budget Transfer
2022-June	555	1 -05-13-2213-5322 INSTRUCTIONAL PROG IMPROVEMENT	\$ 51.00	EOY FY22 Budget Transfer
2022-June	555	1 -02-11-1014-5611 INSTRUCTIONAL SUPPLIES	\$ 49.00	EOY FY22 Budget Transfer
2022-June	555	1 -02-11-1010-5611 INSTRUCTIONAL SUPPLIES	\$ 48.00	EOY FY22 Budget Transfer
2022-June	555	1 -01-11-1013-5641 TEXTBOOKS	\$ 47.00	EOY FY22 Budget Transfer
2022-June	555	1 -03-11-1005-5611 INSTRUCTIONAL SUPPLIES	\$ 28.00	EOY FY22 Budget Transfer
2022-June	555	1 -04-13-2140-5690 OTHER SUPPLIES	\$ 15.00	EOY FY22 Budget Transfer
2022-June	555	1 -01-13-2220-5731 EQUIPMENT - REPLACEMENT	\$ 15.00	EOY FY22 Budget Transfer
2022-June	555	1 -03-11-1017-5330 OTHER PROFESSIONAL & TECH SRVC	\$ 7.00	EOY FY22 Budget Transfer
2022-June	555	1 -01-13-2120-5690 OTHER SUPPLIES	\$ 6.00	EOY FY22 Budget Transfer
2022-June	555	1 -04-12-6110-5560 TUITION EXPENSE	\$ (116,156.00)	EOY FY22 Budget Transfer
2022-June	555	1 -04-12-6110-5510 PUPIL TRANSPORTATION	\$ (101,275.00)	EOY FY22 Budget Transfer
2022-June	555	1 -03-11-1006-5111 CERTIFIED SALARIES	\$ (94,015.00)	EOY FY22 Budget Transfer
2022-June	555	1 -05-14-2600-5112 CLASSIFIED SALARIES	\$ (91,335.00)	EOY FY22 Budget Transfer
2022-June	555	1 -05-15-0000-5112 CLASSIFIED SALARIES	\$ (89,942.00)	EOY FY22 Budget Transfer
2022-June	555	1 -02-11-1016-5111 CERTIFIED SALARIES	\$ (86,215.00)	EOY FY22 Budget Transfer

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

<u>MONTH/YR</u>	<u>JNL#</u>	<u>ACCOUNT NUMBER & DESCRIPTION</u>	<u>AMOUNT</u>	<u>DESCRIPTION</u>
2022-June	555	1 -04-12-1200-5111 CERTIFIED SALARIES	\$ (82,447.00)	EOY FY22 Budget Transfer
2022-June	555	1 -03-11-1013-5111 CERTIFIED SALARIES	\$ (80,014.00)	EOY FY22 Budget Transfer
2022-June	555	1 -03-12-1200-5112 CLASSIFIED SALARIES	\$ (65,087.00)	EOY FY22 Budget Transfer
2022-June	555	1 -03-11-1017-5111 CERTIFIED SALARIES	\$ (56,163.00)	EOY FY22 Budget Transfer
2022-June	555	1 -05-15-2512-5220 WORKER'S COMPENSATION	\$ (51,962.00)	EOY FY22 Budget Transfer
2022-June	556	1 -01-11-1010-5111 CERTIFIED SALARIES	\$ 1.00	EOY FY22 Budget Transfer
2022-June	556	1 -01-13-2220-5111 CERTIFIED SALARIES	\$ 1.00	EOY FY22 Budget Transfer
2022-June	556	1 -03-11-1016-5111 CERTIFIED SALARIES	\$ 1.00	EOY FY22 Budget Transfer
2022-June	556	1 -01-11-1008-5111 CERTIFIED SALARIES	\$ 1.00	EOY FY22 Budget Transfer
2022-June	556	1 -02-11-1001-5111 CERTIFIED SALARIES	\$ 1.00	EOY FY22 Budget Transfer
2022-June	556	1 -03-13-2120-5111 CERTIFIED SALARIES	\$ 1.00	EOY FY22 Budget Transfer
2022-June	556	1 -05-15-2512-5220 WORKER'S COMPENSATION	\$ (6.00)	EOY FY22 Budget Transfer
2022-June	593	1 -05-15-1026-5111 CERTIFIED SALARIES	\$ 1,388.00	EOY FY22 Budget Transfer
2022-June	593	1 -05-15-1026-5112 CLASSIFIED SALARIES	\$ 7.00	EOY FY22 Budget Transfer
2022-June	593	1 -01-12-1200-5111 CERTIFIED SALARIES	\$ (1,395.00)	EOY FY22 Budget Transfer

Instruction

Controversial ~~Issues~~ (Topics?)

The policy of ~~the District~~ Amity Regional School District No. 5 (ARSD) is as follows:

1. ~~The District~~ ARSD has a responsibility to include, in various curriculum areas and at all grade levels, content dealing with ~~critical~~ sensitive topics and using materials, some of which will be controversial ~~or raise objections within the community~~.
2. Development of ~~rational~~ (analytical? ~~logical?~~) thinking and preparation for citizenship are the primary reasons for including the study of controversial topics or use of controversial materials in the curriculum.
3. ~~The District~~ ARSD, as an educational institution, has a responsibility to give the student:
 - a. An opportunity to study controversial topics or read controversial materials which have political, economic, or social significance about which they will begin to ~~have develop~~ an ~~opinion~~ a viewpoint.
 - b. Access to all relevant information, including the materials that circulate freely in the community.
 - c. Competent instruction balancing the various points-of-view in an atmosphere free from bias and prejudice.
 - d. The right to form and express their own ~~opinion~~ thinking on controversial topics or materials without jeopardizing their relations with teachers, peers, or the school.
 - e. Deliberate effort by the teacher to achieve balance over time in the viewpoints to which students are exposed.

The guidelines for the selection of controversial topics or materials to be studied in the classroom:

1. Topics of classroom discussion should, first and foremost, always be driven ~~to~~ by the ~~District~~ ARSD curriculum.
2. The topic or material should contribute toward helping students develop techniques for examining other controversial topics or materials.
3. The topic or material should be suitable for students of the maturity and background represented in the respective class.
4. The topic or material should be related to the standards and course content and help achieve those standards and course objectives.
5. The topic or material should be of continuing significance to society.
6. Exceptions to the above expectations may be granted by the building Principal on a case-by-case basis.

The historic principle of academic freedom grants and protects the teacher's right to raise and reasonably treat controversial ~~issues~~ topics in the carrying out of approved school system curricular policies. It is the duty of the educational community to model for our students the ideals of acceptance of diversity and respect for civil discourse. It is incumbent upon educators to establish an emotionally safe environment for students to explore new ideas. At times, due to

Instruction

Controversial ~~Issues~~ (Topics?)

the nature of public discourse, educators may be reluctant to engage in discussion of controversial topics to avoid the perception of bias or judgment. It is our role to teach varied ideologies and perspectives; engage students in critical thinking; and facilitate students' discovery of their own ideals and thoughts, all while modeling respectful dialogue and authentic inquiry.

Teachers must be keenly aware of their position of influence and that the classroom is not a forum to promote a particular political vantage point. However, nNo statute or court decision has approved of teacher actions or statements, which substantially interfere with the reasonable requirements of school discipline or established curriculum. The guarantees of free speech or the doctrine of academic freedom have never been recognized by the courts as vehicles to allow teachers to violate an established and reasonably well-defined curriculum or to create or modify curriculum programs according to his/her beliefs.

The Amity Regional School District No. 5 (District) ARSD Board of Education (Board) recognizes the role of public education in preparing students for effective citizenship. Consequently, the instructional program to achieve this purpose must appropriately address cultural heritage; critical thinking; and the rights, privileges, and responsibilities of living in a pluralistic society. The Board also recognizes that as students prepare for active engagement in participatory democracy, they often encounter ~~issues~~ topics that may be considered controversial. The Board encourages the examination of controversial ~~issues~~ topics related to the Board-approved curriculum in an impartial and objective manner. The examination of controversial ~~issues~~ topics should occur in inclusive and supportive learning environments that encourage respect for multiple perspectives. The Board also encourages community support of the teaching of controversial ~~issues~~ topics in the classroom in order to promote the development of civic efficacy, student engagement, and critical thinking among ~~District~~ ARSD students.

Amity-ARSD students have the right to discuss controversial ~~issues~~ topics as an essential part of their education. Amity-ARSD teachers, as beneficiaries of the legal rights established in the historic principle of academic freedom, have the right to teach students in ways that best utilize their professional knowledge, interests, and competencies. To these ends, the Board of Education recognizes the place of controversial ~~issues~~ topics in the educational experience of its students, provided that such ~~issues~~ topics are studied under competent instruction in an atmosphere free from bias and prejudice; that they are relevant to the course of study in which they are studied; that they are appropriate learning objectives for the academic level and maturity of the students; and that all sides of the issue in question are taught objectively, equitably, and accurately, as far as possible.

Legal Reference: Connecticut General Statutes

Instruction**Controversial ~~Issues~~ (Topics?)**

31-51q Liability of employer for discipline or discharge of employee on account of employee's exercise of certain constitutional rights.

Keyishian v. Board of Regents 395 U.S. 589, 603 (1967)

Garcetti v. Ceballos, (2006) 547 U.S. 410

Johnson v. Poway Unified School District, (2011) 658 F.3d 954 (9th Cir.)

Mayer v. Monroe County Community School Corporation, (2007) 474 F.3d 477 (7th Cir.)

Academic Freedom Policy (adopted by Connecticut State Board of Education, 9/9/81)

Students

Concepts and Roles in Student Policies

The focus of the school system is on the learner, the student. The student's educational development toward the school's goals is the central concern of the Amity Regional School District No. 5 (ARSD) Board of Education's (Board) policies and the administrator's regulations.

Each child of each parent shall be given equal opportunity. However, children vary widely in capacities, interests, social and economic background. Therefore, no two can be treated exactly alike if the fullest development of each is to be achieved.

The Board will attempt to erase any limitations of facilities and means that stand in the way of our school's availability to all who wish to learn.

Discrimination among students attending our schools with respect to race, color, religious creed, age, marital status, national origin, sex, sexual orientation, disability, gender, class, ethnicity, or identity is prohibited.

Legal Reference: Connecticut General Statutes

10-15 Towns to maintain schools.

10-15c Discrimination in public schools prohibited. School attendance by five-year olds (as amended by PA 11-55)

10-184 Duties of parents. (re mandatory schooling of children five years of age and over and under eighteen)

10-186 Duties of local and regional boards of education re school attendance. Hearings. Appeals to state board. Establishment of hearing board.

10-226a Pupils of racial minorities.

Section 504, U. S. Rehabilitation Act of 1973, 29 U.S.C. @ 794

Students

Goals and Objectives

The Amity Regional School District No. 5 (ARSD) Board of Education (Board) believes that all students have a right to an education which is based on standards of excellence, which stresses rigorous demands, and which serves to expand students' personal horizons. The Board believes that the education of each student is the shared responsibility of students, parents, faculty, and administrators. The Board also recognizes that students differ in their interests and abilities and therefore ARSD offers a comprehensive program consisting of a variety of learning experiences.

The Board believes that an important function of the school is to prepare students for participation in our American democratic society. The Board seeks to improve the intellectual, emotional, social, and physical capacities of all students. The Board encourages the development of thinking and communication skills, the tolerance of and responsibility for others, and the understanding of varied cultures and life styles.

In order to implement this philosophy, recognizing that middle and high school education are important steps in a lifelong process, the Board of Education establishes the following objectives:

- A. To teach the essential skills traditionally associated with the various disciplines.
- B. To develop the four communication skills of listening, speaking, reading, and writing.
- C. To extend and refine the students' ability to comprehend, interpret, and evaluate printed, visual, and aural material.
- D. To develop critical thinking.
- E. To further the students' development of self-awareness, self-discipline, and self-esteem.
- F. To promote the physical well-being of all students.
- G. To promote creativity and appreciation of the arts, humanities, and sciences.
- H. To develop, through a determined course of scholastic experiences, the characteristics illustrated in the Bethany-Orange-Woodbridge-Amity Portrait of the Graduate.
- I. To encourage students to consider both the alternatives to and the consequences of their actions in the decision-making process.
- J. To present career options and to assist students in setting tentative goals.
- K. To help the student appreciate that learning is integrated and continuous.

Students

Foreign Exchange Students

The Amity Regional School District No. 5 (ARSD) Board of Education (Board) supports international studies. Students may participate in international exchange programs and other activities that advance cultural awareness and promote mutual understanding and respect for the citizens of other countries. To that end, it allows foreign exchange students on one-year J-I visas, who are residing with families in the town of Bethany, Orange, or Woodbridge, to enroll on a non-tuition basis in the local schools. Students who apply must not have the equivalent of a high school diploma from a foreign school system. Students who are accepted will be placed no higher than grade 11 and will not be eligible to receive a diploma. Further, they must meet those criteria established by the administration in the areas of language competency, residency, and deportment. Only foreign exchange students sponsored by organizations screened by the administration will be accepted. No more than two (2) students at the high school may be accepted for any school year.

No students will be enrolled, until all necessary registration information has been provided including but not limited to: name, age, immunization record, and sponsor's name and proof of residency. Exchange students must comply with immunization requirements set forth in state law and are subject to all ARSD policies and regulations. At the time of admission to ARSD the exchange student must be at least 16 years of age, but not older than 19 years of age. Students may participate in all curricular, co-curricular, and extracurricular activities including athletics, provided they meet local and Connecticut Interscholastic Athletic Conference (CIAC) criteria.

Students entering the United States on F-I visas may enter the local school system only upon payment of the full, unsubsidized public education costs before entering the United States. Further, students on F-I visas may remain in the United States for no more than twelve (12) months. The local district is prohibited by law from waiving the tuition fee of students on F-I visas.

Legal Reference: Illegal Immigration Reform and Immigration Responsibility Act of 1996

Connecticut General Statutes

10-27 International studies, exchange programs. Advisory committee. (Amended by PA 04-153, An Act Encouraging International Studies Programs)

Policy adopted:

AMITY REGIONAL SCHOOL DISTRICT NO. 5
Woodbridge, Connecticut

Students

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 a vocational school or reach the age of twenty-two, whichever comes sooner, except as provided in Connecticut General Statutes 10-233c and 10-233d. For purposes of establishing the residency of a child of a member of the armed forces as defined in C.G.S. 27-103 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 require their children to attend public day school or its equivalent in the district in which such child resides, unless such child is a high school graduate or the parent or person having control of such child is able to show that the child is elsewhere receiving equivalent instruction in the studies taught in the public schools. Students under age eighteen are subject to mandatory attendance laws, unless they are at least seventeen and their parent/guardian or other person having control of the child consents to such child's removal from school. The parent or person shall exercise this option by personally appearing at the school district office to sign a withdrawal form. Such withdrawal form shall include an attestation from a guidance counselor, school counselor, or school administrator of the school that the district has provided the parent or person with information on the educational opportunities options available in the school system and in the community.

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. ARSD shall work with the local child welfare agency, the school last attended, or other relevant agencies to obtain necessary enrollment documentation.

The parent/guardian of any child who is denied admission to ARSD's schools or an unaccompanied minor, a student eighteen years of age or older, a homeless child or youth or an unaccompanied youth who is denied schooling on the basis of residency, or an agent or officer charged with the enforcement of the laws concerning attendance at school may request in writing a hearing by the Board.

Policy approved:

AMITY REGIONAL SCHOOL DISTRICT NO. 5
Woodbridge, Connecticut
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Students

Age of Attendance

(cf. 5111 - Admission/Placement)
(cf. 5118.1 - Homeless Students)
(cf. 6146 - Graduation Requirements)

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 local and regional boards of education re school attendance. Hearings. (as amended by P.A. 19-179)
Appeals to State Board. Establishment of hearing board
10-233a - 10-233f Inclusive; re: suspend, expel, removal of students
10-233c Suspension of students
10-233d Expulsion of pupils
State Board of Education Regulations
10-76a-1 General definitions (c) (d) (q) (t)
P.A. 19-179 An Act Concerning Homeless Students' Access to Education
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 School Program
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 & Youths Program, Vol. 81 No. 52, 3/17/2016

Policy approved:

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Students

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 (<i>Note: to be deemed excused, an appropriately licensed medical professional must verify all student illness absences, regardless of the absence’s length.</i>) 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)	Parent or Guardian note and in some cases additional documentation (see details below of specific reason).

**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.

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. A student's engagement in remote classes, remote meetings, activities on time-logged electronic systems, and completion and submission of assignments if

Policy approved:

AMITY REGIONAL SCHOOL DISTRICT NO. 5
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Students

Attendance

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."

Responsibility for completion of missed classwork lies with the student, not the teacher.

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

Policy approved:

AMITY REGIONAL SCHOOL DISTRICT NO. 5
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Students

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 must 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

Students

Attendance

the excused absence.

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

Excused Absences for Children of Service Members

An enrolled student, age five to eighteen inclusive, whose parent or legal guardian is an active duty member of the armed forces as defined in section 27-103 and has been called to duty for, is on leave from, or has immediately returned from deployment to a combat zone or combat support posting, shall be granted ten days of excused absences in any school year and, at the discretion of the Board of Education, additional excused absences to visit such child's parent or legal guardian with respect to such leave or deployment of the parent or legal guardian. In the case of such excused absences, such child and parent or legal guardian shall be responsible for obtaining assignments from the student's teacher prior to any period of excused absence and for ensuring that such assignments are completed by such child prior to his or her return to school from such period of excused absence.

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.

Students

Attendance

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

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

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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.

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.

1. 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.
2. Approvals: All approvals for opportunities should:
 - a. be in written form
 - b. detail any requirements placed upon the student as a condition of approval
 - c. include the specific days approved for the opportunities*
 - d. 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

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- agreed on requirements of the approval
- e. *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.*
3. 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.
 4. Approval not assured: 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.

Chronic Absenteeism

The Board, in compliance with statute, requires the establishment of attendance review teams when chronic absenteeism rates in ARSD or at individual schools in ARSD meet the following circumstances:

1. A team for ARSD must be established when ARSD chronic absenteeism rate is 10 percent or higher.
2. A team for the school must be established when the school chronic absenteeism rate is 15 percent or higher.
3. A team for either ARSD or each school must be established when (a) more than one school in ARSD has a school chronic absenteeism rate of 15 percent or higher or (b) ARSD has a District chronic absenteeism rate of 10 percent or higher and one or more schools in ARSD have a school chronic absenteeism rate of 15 percent or higher.

Definitions (Related to Chronic Absenteeism)

Chronically absent child: An enrolled student whose total number of absences at any time during a school year is equal to or greater than ten percent of the total number of days that such student has been enrolled at such school during such school year

Absence: An excused absence, unexcused absence, or disciplinary absence as those terms are defined by the State Board of Education pursuant to C.G.S. 10-198b

District chronic absenteeism rate: The total number of chronically absent children in the previous school year divided by the total number of children under the jurisdiction of the Board for such school year

School chronic absenteeism rate: The total number of chronically absent children for a school in the previous school year divided by the total number of children enrolled in such school for such school year

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Loss of Credit

Students with excessive absences in a high school course may lose credit for that course. The number of absences that may result in a loss of credit for both year-long and semester-long courses will be published annually. Parents/guardians will be notified when a loss of credit has been issued; notification will include the process to appeal the loss of credit.

Legal Reference: Connecticut General Statutes

10-184 Duties of parents (as amended by PA 98-243, PA 00-157 and PA 18-15)

10-185 Penalty

10-198a 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)

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

10-198d Chronic absenteeism (as amended by PA 17-14 and PA 18-182)

45a-8c Truancy clinic. Administration. Policies and procedures. Report. (as amended by PA 15-25)

10-199 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

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

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Physical Restraint, Seclusion, and Exclusionary Time Out

The Amity Regional School District No. 5 (ARSD) Board of Education (Board) believes that maintaining an orderly, safe environment is conducive to learning and is an appropriate expectation of all staff members within ARSD. To the extent that staff actions comply with all applicable statutes and Board policy governing the use of physical force, including physical restraint of students and seclusion of students, staff members will have the full support of the Board of Education in their efforts to maintain a safe environment.

The Board recognizes that there are times when it becomes necessary for staff to use reasonable restraint or place a student in seclusion as an emergency intervention to protect a student from harming himself/herself or to protect others from harm.

Definitions

Life-threatening physical restraint means any physical restraint or hold of a person that restricts the flow of air into a person's lungs, whether by chest compression or any other means, or immobilizes or reduces the free movement of a person's arms, legs, or head while the person is in the prone position.

Psychopharmacologic agent means any medication that affects the central nervous system, influencing thinking, emotion, or behavior.

Physical restraint means any mechanical or personal restriction that immobilizes or reduces the free movement of a person's arms, legs, or head. Excluded from this definition are: briefly holding a person in order to calm or comfort the person; restraint involving the minimum contact necessary to safely escort a person from one area to another; medical devices including but not limited to supports prescribed by a health care provider to achieve proper body position or balance; helmets or other protective gear used to protect a person from injuries due to a fall; or helmets, mitts, and similar devices used to prevent self-injury when the device is part of a documented treatment plan or individualized education program pursuant to Connecticut's special education laws or prescribed or recommended by a medical professional and is the least restrictive means to prevent such self-injury.

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

Seclusion means the involuntary confinement of a student in a room, with or without staff supervision, in a manner that prevents the student from leaving.

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Student means a child: (A) enrolled in grades kindergarten to twelve inclusive in a public school under the jurisdiction of a local or regional board of education, (B) receiving special education and related services in an institution or facility operating under contract with a local or regional board of education, (C) enrolled in a program or school administered by a regional education service center, or (D) receiving special education and related services from an approved private special education program, but shall not include any child receiving educational services from Unified School District #2 or the Department of Mental Health and Addiction Services.

Exclusionary time out means a temporary, continuously monitored separation of a student from an ongoing activity in a non-locked setting for the purpose of calming such student or deescalating such student's behavior.

Conditions Pertaining to the Use of Physical Restraint and/or Seclusion

- A. School employees shall not use a life-threatening physical restraint on a student.
- B. If any instance of physical restraint or seclusion of a student exceeds fifteen minutes, an administrator or his/her designee or a school health or mental health personnel or a board certified behavioral analyst who has received training in the use of physical restraint and seclusion shall determine whether continued physical restraint or seclusion is necessary to prevent immediate or imminent injury to the student or to others. Upon a determination that such continued physical restraint or seclusion is necessary, such individual shall make a new determination every thirty minutes thereafter regarding whether such physical restraint or seclusion is necessary to prevent immediate or imminent injury to the student or to others.
- C. No student shall be placed in seclusion unless:
 - a. The use of seclusion is as an emergency intervention to prevent immediate or imminent injury to the student or to others, provided the seclusion is not used for discipline or convenience and is not used as a substitute for a less restrictive alternative.
 - b. Such student is continually monitored by a school employee during the period of such student's seclusion. Any student voluntarily or involuntarily placed in seclusion or restrained shall be regularly evaluated by a school employee for indications of physical distress. The school employee conducting the evaluation shall enter each evaluation in the student's educational record. Monitor shall mean by direct observation or by observation using video monitoring within physical proximity sufficient to provide aid as may be required.
 - c. The area in which such student is secluded is equipped with a window or other

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- fixture allowing the student a clear line of sight beyond the area of seclusion.
- d. Seclusion shall not be utilized as a planned intervention in a student's behavioral intervention plan, individualized education program, or plan pursuant to Section 504 of the Rehabilitation Act of 1973 as amended from time to time.
- D. School employees may not use a psychopharmacologic agent on a student without that student's consent except: (1) as an emergency intervention to prevent immediate or imminent injury to the student or to others or (2) as an integral part of the student's established medical or behavioral support or educational plan as developed consistent with section 17a-543 of the Connecticut General Statutes or, if no such plan has been developed, as part of a licensed practitioner's initial orders. The use of psychopharmacologic agents, alone or in combination, may be used only in doses that are therapeutically appropriate and not as a substitute for other appropriate treatment.
- E. Prior to physical restraint or seclusion being used on a student more than four times within twenty school days:
- a. An administrator, one or more of such student's teachers, the parent/guardian of such student and, if any, a mental health professional shall convene for the purpose of:
 - i. Conducting or revising a behavioral assessment of the student;
 - ii. Creating or revising any applicable behavioral intervention plan; and
 - iii. Determining whether such student may require special education.
 - b. If such student is a child requiring special education or is a child being evaluated for eligibility for special education and awaiting a determination, such student's planning and placement team shall convene for the purpose of: (1) conducting or revising a behavioral assessment of the student and (2) creating or revising any applicable behavioral intervention plan including, but not limited to, such student's individualized education plan.
- F. The parent/guardian of a student who is placed in physical restraint or seclusion shall be notified not later than twenty-four hours after the student is placed in physical restraint or seclusion. A reasonable effort shall be made to provide such notification immediately after such physical restraint or seclusion is initiated.
- G. School employees shall not use a physical restraint on a student or place a student in seclusion, unless he/she has received training on the proper means for performing such physical restraint or seclusion.

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- H. The Board and each institution or facility operating under contract with the Board to provide special education for children including any approved private special education program shall:
- a. Record each instance of the use of physical restraint or seclusion on a student;
 - b. Specify whether the use of seclusion was in accordance with an individualized education program;
 - c. Specify the nature of the emergency that necessitated the use of such physical restraint or seclusion; and
 - d. Include such information in an annual compilation on its use of such restraint and seclusion on students.
- I. The Board and institutions or facilities operating under contract with the Board to provide special education for children, including any approved private special education program, shall provide such annual compilation to the Department of Education in order to examine incidents of physical restraint and seclusion in schools.
- J. Any use of physical restraint or seclusion on a student shall be documented in the student's educational record. The documentation shall include:
- a. The nature of the emergency and what other steps, including attempts at verbal de-escalation, were taken to prevent the emergency from arising if there were indications that such an emergency was likely to arise; and
 - b. A detailed description of the nature of the restraint or seclusion, the duration of such restraint or seclusion, and the effect of such restraint or seclusion on the student's established educational plan.
- K. Any incident of the use of restraint or seclusion that results in physical injury to a student shall be reported to the State Board of Education.

Required Training and Prevention Training Plan

Training shall be provided by the Board to school professionals, paraprofessional staff members, and administrators regarding physical restraint and seclusion of students. Such training shall be phased in over a period of three years beginning with the school year commencing July 1, 2015, and shall include, but not be limited to:

1. An overview of the relevant laws and regulations regarding the use of physical restraint and seclusion on students.
2. The creation of a plan by which the Board will provide school professionals, paraprofessional staff members, administrators, or other school employee with training and professional development regarding the prevention of incidents requiring physical restraint or seclusion of students.
3. The Board will create a plan requiring the training of all school professionals,

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paraprofessional staff members, identified staff, and administrators by regarding the proper means of physically restraining or secluding a student, including but not limited to:

- a. Verbal defusing and de-escalation;
- b. Prevention strategies;
- c. Various types of physical restraint and seclusion;
- d. The differences between life-threatening physical restraint and other varying levels of physical restraint;
- e. The differences between permissible physical restraint and pain compliance techniques;
- f. Monitoring methods to prevent harm to a student who is physically restrained or in seclusion, including training in the proper means of physically restraining or secluding a student; and
- g. Recording and reporting procedures on the use of physical restraint and seclusion.

Crisis Intervention Teams

The Board requires each school in ARSD to identify a crisis intervention team. Such team shall consist of school professionals, paraprofessional staff members, administrators, or other school employees trained in the use of physical restraint and seclusion.

Such teams shall respond to any incident in which the use of physical restraint or seclusion may be necessary as an emergency intervention to prevent immediate or imminent injury to a student or to others.

Each member of the crisis intervention team shall be recertified in the use of physical restraint and seclusion on an annual basis.

Exclusionary Time Out

This policy regarding exclusionary time-outs includes the following requirements:

1. Exclusionary time-outs are not to be used as a form of discipline;
2. At least one school employee remain with the student or be immediately available to the student such that the student and school employee are able to communicate verbally throughout the exclusionary time out;
3. The space used for an exclusionary time out is clean, safe, sanitary, and appropriate for the purpose of calming such student or deescalating such student's behavior;
4. The exclusionary time-out period terminate as soon as possible; and
5. If such student is a child requiring special education as defined in C.G.S. 10-76a or a child being evaluated for special education pursuant to C.G.S. 10-76d and awaiting a determination and the interventions or strategies are unsuccessful in addressing such

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student's problematic behavior, such student's planning and placement team shall convene as soon as is practicable to determine alternative interventions or strategies.

Dissemination of Policy

This policy and its procedures shall be made available on ARSD website and in the Board's procedural manual. The policy shall be updated not later than sixty (60) days after the revision of regulations promulgated by the State Board of Education.

(cf. 4148 - Employee Protection)

- Legal Reference:
- Connecticut General Statutes
 - 10-76b State supervision of special education programs and services.
 - 10-76d Duties and powers of boards of education to provide special education programs and services.
 - 10-236b Physical restraint and seclusion of students by school employees. (as amended by PA 17-220 and PA 18-51)
 - 46a-150 Definitions. (as amended by PA 07-147 and PA 15-141)
 - 46a-152 Physical restraint, seclusion and use of psychopharmacologic agents restricted. Monitoring and documentation required.
 - 46a-153 Recording of use of restraint and seclusion required. Review of records by state agencies. Reviewing state agency to report serious injury or death to Office of Protection and Advocacy for Persons with Disabilities and to Office of Child Advocate. (as amended by PA 12-88)
 - 53a-18 Use of reasonable physical force or deadly physical force generally.
 - 53a-19 Use of physical force in defense of person.
 - 53a-20 Use of physical force in defense of premises.
 - 53a-21 Use of physical force in defense of property.

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PA 07-147 An Act Concerning Restraints and Seclusion in Public Schools.

PA 15-141 An Act Concerning Seclusion and Restraint in Schools.

State Board of Education Regulations Sections 10-76b-5 through 10-76b-11.

Personnel – Certified/Non-Certified

Employee Protection

An employee may use reasonable physical force only to prevent serious physical injury to themselves, to another person, to Amity Regional School District No. 5 (ARSD) property, or to restrain a minor or remove a minor to another area. Nothing in this policy requires any school personnel to sustain physical injury before applying reasonable force. Employees should use their physical presence and verbal commands whenever feasible before using physical contact of any type. Each employee is expected to respond to emergency situations with the highest level of good judgment and professional competence.

Employees shall immediately report cases of assault suffered by them in connection with their employment to their Principal or other immediate superior and to local law enforcement agencies. Such notification shall be forwarded immediately to the Superintendent who shall comply with any reasonable request from the employee for information in the possession of the Superintendent relating to the incident or the persons involved and shall act as liaison between the employee, the police, and the courts.

No school administrator shall interfere with the right of a teacher or other school employee to file a complaint with the local police authority in cases of threats of physical violence or actual physical violence against such teacher or employee.

As required by law, the Board of Education (Board) will file a report annually with the State Board of Education indicating the number of threats and physical assaults made by students upon teachers, administrators, and other school personnel and the number of physical assaults involving dangerous weapons made by students upon other students.

If criminal or civil proceedings are brought against an employee alleging that the employee committed an assault in connection with his/her employment, such employee may request the Board to furnish legal counsel to defend the employee in any civil action or proceeding brought against the employee within the limits set by law.

The Board shall reimburse an employee for the cost of medical, surgical, or hospital services (less the amount of any insurance reimbursement) incurred as the result of any injury sustained in the course of his/her employment.

Section 52-557b of the General Statutes grants immunity from liability for emergency medical assistance to a person in need of it when the assistance is given by a teacher or other school personnel on the school grounds, in a school building, or at a school function provided that the teacher or other staff member has completed a course in first aid offered by the American Red Cross, the American Heart Association, the State Department of Health Services, or any municipal health department as certified by that agency, has such immunity that extends to civil damages for any personal injuries which result from acts or omissions by the person giving the emergency care or first aid which might constitute ordinary negligence. Such immunity does not apply to acts or omissions constituting

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Personnel – Certified/Non-Certified

Employee Protection

gross, willful or wanton negligence.

(c.f. 5144.1 – Restraint and Seclusion)

Legal Reference: Connecticut General Statutes

10-233b Removal of pupils from class.

10-233c Suspension of pupils.

10-233g Boards to report school violence. Reports of principals to police authority.

10-235 Indemnification of teachers, board and commission members and employees in damage suits; expenses of litigation.

10-236 Liability insurance.

10-236a Indemnification of educational personnel assaulted in the line of duty.

52-557b Immunity from liability for emergency medical assistance, first aid or medication by injection. School personnel not required to administer or render.

53a-18 Use of reasonable physical force or deadly physical force generally.

53a-19 Use of physical force in defense of person.

Instruction

Advanced College Opportunity

The Board of Education (Board) encourages students to advance academically at a pace appropriate for them. Therefore, it shall permit advanced placement in college, either on a full-time or part-time basis, for students who are exceptionally able and motivated academically.

The administration shall develop the criteria and regulations pertaining to students who may be accorded advanced placement privileges.

When such individual programs meet with the approval of the school administration, the student may be released from high school attendance on a full-time or part-time basis and shall be awarded a high school diploma after evidence is received that s/he has met, through college work, all necessary academic requirements for graduation.

Amity Regional School District (ARSD) will not provide transportation for students participating in advanced college placement.

Instruction

Advanced Courses or Programs, Eligibility Criteria for Enrollment

Purpose

The Amity Regional School District No. 5 (ARSD) Board of Education (Board) believes in the basic principle that academic rigor and the opportunity to accelerate learning should be available to all students. All students at the high school level will be provided an opportunity to participate in a rigorous and academically challenging curriculum.

The Board encourages students to pursue rigorous, challenging academic coursework such as, but not limited to, honors classes, dual enrollment, dual credit, and advanced placement classes.

The Board will communicate information about advanced courses or programs to students and parents; offer district-wide counseling to students about the opportunities for advanced level courses and programs; and annually report on ARSD progress toward increasing students' readiness and participation for advanced courses or programs.

Definitions

An **"advanced course or program"** is defined as an honors class, advanced placement class, International Baccalaureate program, Cambridge International Program, dual enrollment, dual credit, early college, or any other advanced or accelerated course or program offered by the Board of Education in grades 9-12 inclusive.

"Prior academic performance" means the course or courses that a student has taken, the grades received for each course, and a student's grade point average.

Procedures/Criteria/Guiding Principles

An emphasis on equity must include a focus on increasing all students' access to rigorous learning opportunities to assist all students to be prepared for success after high school. The following district-level and school-level principles will contribute to fostering greater equity in student participation in advanced courses or programs:

1. Provide a course sequence and foundation-building in middle school, ensuring high expectations for all students, that makes later advanced coursework a viable option;
2. Create multiple access points to advanced courses and programs, allowing students to access these programs at various points of their high school experience;
3. Use only enrollment access criteria that are educationally necessary;
4. Use multiple methods by which a student may satisfy eligibility criteria for enrollment, including but not limited to:
 - a. Recommendations from teachers, administrators, school counselors, or other school personnel;
 - b. Criteria not exclusively based on a student's prior academic performance;
 - c. Use of a student's prior academic performance must rely on evidence-based indicators of how a student will perform in an advanced course or program;
 - d. GPA improvement over time;
 - e. Scoring near benchmark on local assessments; and
 - f. Student interests and persistence.

Instruction

Advanced Courses or Programs, Eligibility Criteria for Enrollment

5. Offer a robust set of student supports which can include peer tutoring, access to technology, and support from school counselors that help all students succeed in advanced courses or programs; and
6. Publish and disseminate materials that encourage all students to participate in advanced courses and programs.

In order to access advanced courses or programs, students need to complete sufficiently difficult coursework at the middle school level. This equitable course enrollment policy is based on rigorous learning opportunities for all students in middle grades.

High school students willing to accept the challenge of a rigorous academic curriculum shall be admitted to an advanced course or program as defined in this policy. Students who have successfully completed the prerequisite course work or have otherwise demonstrated mastery of the prerequisite content knowledge will be allowed to enroll in advanced courses or programs offered by ARSD. The student must request the course or program through the spring enrollment process.

ARSD administrators and school counselors shall advise students and parents/guardians of the opportunity to participate in advanced courses or programs as defined in this policy. Teachers shall also encourage students to take challenging courses.

The Board seeks an equitable course enrollment procedure that limits prerequisites and entrance requirements to those that are directly related to a student's potential for success. Therefore, multiple measures must be used to identify students for advanced coursework, so that no single measure excludes their participation.

Advanced courses or programs must comply with applicable ARSD policies and state standards, and this policy must be in accordance with CT State Department of Education promulgated guidance.

The Superintendent or his/her designee shall ensure the development and/or identification of program stipulations, eligibility criteria, student attendance and discipline standards/expectations, and criteria for continuation in advanced courses or programs and shall ensure the development and/or identification of procedures for students encountering difficulty and/or wishing to drop advanced courses.

Evaluation

The Board will review annually data on student participation in advanced courses or programs; the data shall be disaggregated by gender, ethnicity, race, English language learners, students with disabilities, and free/reduced lunch participation. Such data will be used during the planning process for course and program offerings in the upcoming school year.

- (cf. 6141.4 - Independent Study)
(cf. 6141.5 - Advanced College Placement)
(cf. 6172.1 - Gifted and Talented Students)

Instruction

Advanced Courses or Programs, Eligibility Criteria for Enrollment

Legal Reference: Connecticut General Statutes

P.A. 21-199 Section 3

10-221r Advanced placement course program. Guidelines.

District Guidance for Developing an Advanced Course Participation Policy

Instruction

Challenging Curriculum Policy (Criteria for Identification of Eligible Grade 8, 9 Students)

The Amity Regional School District No. 5 (ARSD) Board of Education (Board) recognizes its responsibility to identify academically advanced students in grades 8 and 9, in compliance with Section 5 of P.A. 21-199, and to provide them with appropriate instructional adaptations and services. Any student who is capable of and wishes to do advanced course work or take an accelerated course or program, as detailed in this policy, should be permitted to do so (in grades 8 and 9).

The Board desires to nurture potential in all students and to challenge students with advanced capabilities through differentiation and responsive instruction. The needs of advanced and high potential learners will be equitably addressed across all populations.

In compliance with Section 5 of P.A. 21-199 the Board adopts this "challenging curriculum policy" aligned with CT State Department of Education (CSDE) guidance. This policy includes, as required, the criteria for the identification of students in grades 8 and 9 who may be eligible to take or enroll in an advanced course and that such identified students have an academic plan.

ARSD middle schools will offer advanced academic opportunities in the four content areas of: language arts, mathematics, social studies, and science.

Criteria

For purposes of this policy these are students who possess or demonstrate high levels of ability in one or more content areas when compared to their chronological peers in ARSD and who would benefit from advanced courses or programs in order to achieve in accordance with their capabilities.

The Superintendent or his/her designee will develop procedures for an ongoing identification process that includes multiple measures in order to identify student strengths in intellectual ability, creativity, or a specific academic area. The identification process shall include consideration of all students including those who are English language learners and those with Individualized Education Plans or 504 Plans.

Students who experience success in advanced courses or programs may exhibit the following characteristics: reading at or above grade level; strong study skills and self-motivation; proficient oral and written communication skills; self-discipline to plan, organize, and carry out tasks to completion; and interest and self-directedness in the particular subject. Student aptitudes, attributes, and academic behaviors will be identified, assessed, and reviewed through a multi-step, multi-modal, and multi-dimensional identification system. Such students may be found within any racial, ethnic, or socioeconomic group, within any nationality, across genders, and within populations of students with disabilities.

Identification Process

Identification is a multi-step process, which shall consist of screening and referral, assessment of eligibility, and placement/enrollment.

Instruction

Challenging Curriculum Policy (Criteria for Identification of Eligible Grade 8, 9 Students)

The Superintendent or his/her designee is directed to develop and document appropriate curricular and instructional modifications and/or programs for such identified students in grades 8 and 9 indicating content, process, products, and learning environments.

The identification process may include the following:

- Assessment of cognitive ability
- Specific academic ability in one or more of the following content areas: math, science, language arts, social studies
- Creative thinking ability
- Giftedness
- Teacher recommendations/referrals
- Referrals from parents, students
- Placement tests if available
- Parental approval

Detailed information will be made available on the ARSD website regarding this policy and the procedures used to identify students who would benefit from enrollment in advanced courses or programs and the required academic plan.

Academic Plan

Each identified student shall develop an academic plan for grade 8 through high school. The plan, developed with the assistance of parents/guardians and with the advice and recommendations of school personnel, shall be reviewed annually. The plan is to include a list of courses and learning activities/programs in which the student will engage while working toward the fulfillment of graduation requirements and that will result in college or career readiness.

The student's academic plan must be designed to enroll the identified student in one or more advanced courses or programs and allow the student to earn high school and college credit or result in career readiness.

The academic plan must be aligned with the following:

1. the courses or programs currently offered by the Board of Education
2. the student's student success plan
3. the high school graduation requirements established in state law
4. any other Board-adopted policies or standards relating to student enrollment eligibility for advanced courses or programs.

A student or his or her parent/guardian have the right to decline the implementation of the provisions of the academic plan. The plan should be updated as necessary and at a minimum at least once a year.

Beginning in the middle school years students must be counseled on opportunities for

Instruction

**Challenging Curriculum Policy
(Criteria for Identification of Eligible Grade 8, 9 Students)**

beginning post-secondary education prior to high school graduation. Such opportunities include access to Advanced Placement (AP) or college-level courses for degree credit. Wherever possible students shall be encouraged and offered opportunities to take college courses simultaneously for high school graduation requirements and college degree credit (dual enrollment) upon approval of the Principal prior to such participation and the willingness of the college to accept the student for admission to the course or courses.

(cf. 6141.4 - Independent Study)

(cf. 6141.5 - Advanced College Placement)

(cf. 6141.51 - Advanced Courses or Programs-Eligibility Criteria for Enrollment)

(cf. 6172.1 - Gifted and Talented Students)

Legal Reference: Connecticut General Statutes
P.A. 21-199 Section 5
10-221r Advanced placement course program. Guidelines.
District Guidance for Developing an Advanced Course Participation Policy