

**AMITY REGIONAL SCHOOL DISTRICT NO. 5**

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

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*Dr. Jennifer P. Byars  
Superintendent of Schools*

**AMITY REGIONAL BOARD OF EDUCATION REGULAR MEETING AGENDA**

**Monday, March 13, 2023, 6:30 pm  
25 Newton Road, Woodbridge, CT**

1. **CALL TO ORDER**
2. **PLEDGE OF ALLEGIANCE**
3. **STUDENT REPORT**
  - a. Monthly Report
4. **RECOGNITION OF NATIONAL MERIT SCHOLARSHIP FINALISTS page 4**
5. **PUBLIC COMMENT**
6. **SUPERINTENDENT’S REPORT**
  - a. **Personnel Report page 5**
  - b. **Superintendent Report page 6**
7. **CORRESPONDENCE**
8. **CHAIRMAN’S REPORT**
  - a. Committee Reports
    1. ACES
    2. CABE
    3. Communications
    4. Curriculum
      - a. Discussion and Possible Action on approval of 8th grade Social Studies textbook, Houghton Mifflin Harcourt’s US History: Beginnings to 1877
    5. District Health and Safety
    6. Diversity, Equity, and Inclusion Executive Committee
    7. District Technology page 10
      - a. Monthly Report
    8. Facilities page 11
      - a. Monthly Report

**PLEASE POST**

**PLEASE POST**

9. Finance
    - a. Discussion and Possible Action on the Superintendent's Proposed 2023-24 Budget page 12
    - b. Discussion of Monthly Financial Statements page 14
    - c. Director of Finance and Administration Approved Transfers Under \$3,000 page 51
    - d. Discussion and Possible Action on Budget Transfers over \$3,000 page 53
    - e. Other
      1. Grant Report page 56
      2. Capital Report page 60
  10. Policy
    - a. First Read
      1. Policy 6161 Materials Selection and Deselection Policy page 61
    - b. Second Read – Discussion and Possible Action on Approval of Policies
      1. Policy P5131 Students Conduct and Discipline page 71
      2. Policy P5131.7 Students Weapons and Dangerous Instruments page 93
      3. Policy P5131.8 Students Out of School Misconduct page 96
  11. Personnel
10. **NEW BUSINESS**
11. **ITEMS FOR THE NEXT AGENDA – Due to Chairperson by March 31, 2023**
12. **ADJOURNMENT**

**IN THE EVENT THE DISTRICT IS CLOSED DUE TO INCLEMENT WEATHER, THIS MEETING WILL BE CONDUCTED VIRTUALLY. A CHANGE TO A VIRTUAL MEETING WILL BE POSTED ON THE AMITY WEBSITE.**

[CLICK HERE TO VIEW THIS MEETING](#)

*Members of the public can submit their comments to be added to the public record by emailing the [Clerk of the Board of Education](#) prior to 2:00 pm on the day of the meeting. These comments will be summarized by the Committee Chairperson in the place so designated in the agenda for the meeting. The public may also email the [Clerk of the Board](#) by 2:00 pm on the day of the meeting and request to speak during public comment as noted on the agenda. Those members of the public making such request will be provided with the information necessary to join the meeting electronically to provide public comment. Amity Regional School District No. 5 shall provide any member of the public with a physical location and the electronic equipment needed to attend a fully remote meeting in real-time. Members of the public must request this provision by emailing the [Clerk of the Board of Education](#) by the close of the last business day before the day of the fully remote meeting.*



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*

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**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.



**2022-2023**

**NATIONAL MERIT  
SCHOLARSHIP PROGRAM**

***\*Finalists\****

👍 **PIYUSH BAHEL**

👍 **JACOB J BETTENCOURT**

👍 **FRANCIS D CAVALLARO**

👍 **JENNIFER LI**

👍 **SI RU LIANG**

👍 **YUQI LIU**

👍 **MELINDA M LU**

👍 **BRIAN R SCULLY**



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



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

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

**March 13, 2023**

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

**NEW HIRES-CERTIFIED: NONE**

- Amity Regional High School:
- Amity Regional Middle School – Bethany:
- Amity Regional Middle School – Orange:

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

*Paul Parzyszek* – Emergency Generalist Building Substitute; Amity Regional High School  
*Robert Lamparski* – Bench Substitute; Amity Regional High School

**NEW HIRES-NON-CERTIFIED:**

*Max Lafontant* – Paraprofessional; Amity Middle School-Bethany  
*Ryan Drew* – 2<sup>nd</sup> Shift Custodian – Amity Middle School-Orange

**NEW HIRES-COACHES:**

*Jeffrey Rotteck* – Assistant Baseball Coach – 2023 Spring Season – Amity Regional High School  
*Brendan Bogan* – Baseball Coach – 2023 Spring Season – Amity Middle School-Orange

**TRANSFERS:**

*Michael Sibarium* – FT 2<sup>nd</sup> Shift Custodian at Amity Middle School-Bethany to the position of FT 2<sup>nd</sup> Shift Custodian - Floater between Amity Middle School-Bethany and Orange, effective 03/20/2023

*Julie Giordano* – PT Paraprofessional at Amity Middle School-Orange to the position of PT Paraprofessional at Amity Transition Academy-University of New Haven, Orange Campus, effective 03/02/2023

**RESIGNATIONS:**

*Gunnar Poulimas* – Assistant Boys Volleyball Coach ~ Amity Regional High School, effective 3/1/2023  
*Yawovi Simpini* – Paraprofessional ~ Amity Regional High School, effective 03/31/2023

**RETIREMENTS:**

*Aleksandr Zektser* – 2<sup>nd</sup> Shift Custodian, Amity Middle School-Orange, effective 04/17/2023

# AMITY REGIONAL SCHOOL DISTRICT NO. 5

Bethany Orange Woodbridge  
25 Newton Road, Woodbridge, Connecticut 06525



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Dr. Jennifer P. Byars  
Superintendent of Schools

jennifer.byars@amityregion5.org  
203.392.2106

## Superintendent's Report – March 2023

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

Enhance the efficient and effective use of resources.

Foster a supportive climate for students and adults.

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

### Instruction

**ARHS Trades Week:** Amity Regional High School's Trades Week was held February 13-17, 2023. The week-long event was designed to foster, promote, and teach students about careers in the skilled trade fields. Throughout the week students had the opportunity to meet with over 20 different skilled trades people in a variety of fields who came in to hold information sessions during lunches.

**State Champions!:** The ARHS Academic Decathlon Team won the state championship on February 25, 2023 and qualified to compete in the national championship in Texas later this spring.

**Beecher and BCS Elementary School Visits:** This past month, the AMSB Administration and Counseling Department visited both Beecher Road School and Bethany Community School to welcome the class of 2029 to the Amity School District. After a brief presentation from the AMSB team, the students asked many questions about middle school and were all excited to greet us.

**Journalism Presentation:** ARHS English Teacher Emily Clark has arranged to have Mark Mirko from CT Public come in as a guest speaker on March 3, 2023. Mark talked with approximately 80 students about his career in journalism and the lessons from it that students can apply in their own lives and career plans.

**Portrait of a Graduate & Learning Progressions:** A team of teachers and administrators from across the district met this month to complete the first draft of the BOWA Portrait of a Graduate's Learning Progressions. The creation of a Learning Progressions document will give teachers and students a clearer picture of what the characteristics of the Portrait of the Graduate look like at different levels of development over time. Following the meeting, the document was shared with faculty at each of the schools and their feedback was collected. As part of the continued rollout of the Portrait of a Graduate, the Learning Progressions document will also be shared with students, and they will be given an opportunity to provide feedback as well.

**AMSO Students at Southern Regionals:** Ten AMSO students attended the Southern Regional Music Festival on March 3-4, 2023. Over 300 students and professional music educators came together to highlight students' skills and talent from around the State. The group rehearsed for over 7 hours with a culminating performance on March 4, 2023.

**Learning Walks Update:** Instructional learning walks focused on collecting observational evidence of the Portrait of the Graduate continue regularly throughout the district. As of March 1<sup>st</sup>, over 100 classroom visits have been conducted. Principals are reviewing the learning walk protocol with their leadership teams throughout the month of March and content leaders at the middle schools and department chairs at the high school have been invited to join in the process.

**Professional Development and Evaluation Committee (PDEC):** Members of the district's PDEC Committee met this month to review preliminary guidelines from the State Department of Education for the creation of new district Teacher Evaluation and Support Plans. The group also continued their work on the development of the 2023-24 professional learning calendar.

**Curriculum Articulation Meetings:** Social Studies and CTE Curriculum Articulation meetings occurred this month. The agenda topics that were covered included identifying opportunities for targeted professional learning and discussions pertaining to curriculum alignment and pacing.

**AMSO Home to Map Contest Winner:** Congratulations to AMSO student, Monica Chen, for winning the Jr. Scholastic Map Man contest. Monica's map submission was selected as the grand prize winner out of over 1500 entries from across the United States. We look forward to seeing her map published in Jr. Scholastic in the coming months. Several AMSO students participated in this contest with the support of their Social Studies teachers.

## **Resources**

**BOWA Elected Officials' Day:** AMSB and ARHS appreciated the opportunity to show off some of what makes our schools a special place in the first *Elected Officials Day* on March 3, 2023. ARHS Student representatives Anchal Bahel (Senior Class President), Frank Cavallaro (Student Body President), and Marin Korenaga (BOE Representative) did a great job representing the high school student body, and the lunch catered by Chef Hans' culinary students was a highlight of the visit. (Unfortunately, inclement weather cancelled the visit to AMSO, but we look forward to continuing this event in the next school year.)

**Ray's Box of Sox:** AMSO students and staff are again running the Ray's Box of Sox fundraiser. This fundraiser is in honor of a Ray Heenie, a former AMSO student who passed away suddenly. Students across the district are collecting socks to be donated to local homeless shelters in the area. The goal is to collect over 1000 pairs of socks by the end of March.

**Free Lunch Returns:** Beginning March 1, 2023, all students are again eligible for free lunch. This state-funded, state-approved opportunity will remain in effect through the end of the current school year. Students are able to receive one school lunch at no cost but will need to use funds to purchase ala carte items or second meals.

**BOWA District Meetings:** As part of the collaboration with the BOWA feeder schools, Andrea Drewry, ELA Instructional Coach, has been visiting elementary school classrooms in Woodbridge, Bethany, and Orange to observe and discuss reading instruction. Additionally, 6<sup>th</sup> grade social studies teachers from each of the sending schools met with 7<sup>th</sup> grade middle school teachers this month to review the alignment of the vertical curriculum.

**ARHS Athletics Update:** The Winter Sports season has concluded, and pre-season practices for spring sports will begin in mid-March. The Athlete and Parent Information Night was held in-person on February 23, 2023, and the Spring Sports Coaches Meeting was held on March 7, 2023.

**NASP Annual Convention:** Members of the Amity Pupil Services Department attended the National Association of School Psychologists Annual Convention in Denver, CO. The annual convention provided access to nearly 1,000 professional development activities spread across four days. Additionally, our staff attended Regional Leadership and Leadership Assembly meetings designed as leaders within the fields of School Psychology, Mental Health, and Special Education.

**Middle School Spring Sports Registration:** The middle school Spring Sports Season is about to begin. Any student interested in participating in spring sports needs to complete a few important online registration steps. In the spring, Amity Middle Schools offer Boys Volleyball, Baseball, Softball, and Co-ed Track. All registration and all forms must be completed and turned in by March 22, 2023. In order to participate in a spring sport, students must have an updated physical dated after May 15, 2022.

**COPs Support Continues:** Related services providers (School Psychologists, Social Workers, Behavior Analysts, and Speech Language Pathologists) continue to attend the Communities of Practice (COPs) offered by the CSDE and the RESC Alliance. The COPs offer discipline specific meetings that utilize a mini professional growth model or problem of practice model.

**ConnCASE Annual Legal Conference:** Amity's PPS Coordinator and PPS Director attended the ConnCASE Annual March Legal Conference. Legal experts from across the state and country presented over the course of two days. This annual legal conference also allows for collaboration between special education administrators and advocates from different parts of Connecticut.

## Climate

**Unified Valentine's Day Dance:** Amity Regional High School hosted a Unified Valentine's Day Dance on February 16, 2023. We had many other Unified teams attending, a live DJ, and lots of great dance moves! Our Amity Culinary made snacks for everyone to enjoy in the cafeteria once the dance had ended.

**2023 CAS-CIAC Scholar-Athletes:** Congratulations to Daniel Liu and Anushka Acharya, Amity's 2023 CAS-CIAC Scholar-Athletes. This award is the highest honor to receive as a student-athlete at Amity. Both Daniel and Anushka are the best of the best of our senior student-athletes. They are extremely high performers both in the classroom and as a student-athlete on the track and the court, as well as having the highest level of character. CAS and CIAC will be honoring our scholar-athletes at the CAS-CIAC Scholar-Athlete Awards Banquet on Sunday, May 7, 2023 at the Aqua Turf Club in Southington.

**2023 CAS High School Arts Awards:** The Connecticut Association of Schools (CAS) honors excellence in both the arts every spring by presenting the CAS High School Arts Awards. ARHS is proud to announce Amity's honorees for 2023. The Arts Award winners are Marin Korenaga for performing arts and Chloe Adzigian for studio arts.

**Amity Middle Schools to see Hockey Game:** On April 4, 2023, all students at AMSB & AMSO will have the opportunity to take a field trip to watch the Bridgeport Islanders play. This trip is an event where schools from across the state come to watch the game and receive positive messages throughout about maintaining an anti-bullying position and building self-confidence.

**Unified Science Field Trip:** On February 24, 2023, the Unified Science class at ARHS in conjunction with the 9-12 SAILS program took a field trip to the Connecticut Science Museum in Hartford. Students

could interact with dozens of exhibits while applying some of the skills they had been learning in their unified classroom. Appreciation is extended to our Amity advocates who also joined the trip.

**Broadway Entertainers Field Trip:** On March 29, 2023, the 8<sup>th</sup> grade Entertainers Elective students will take a class trip to NYC to see Harry Potter on Broadway. The event is a culminating activity for students who participated in the Entertainers Elective at AMSB.

**AMSB Spring Concert:** The AMSB Spring Concert will be held on May 4, 2023 in the AMSB Gym, starting at 6:30 pm. The choir, band, and strings students are well underway putting together a wonderful musical celebration, and we look forward to sharing it with family and friends!

**Unified Sports Schedule:** Unified Sports is an integral part of student life at Amity, and in the past month ARHS was the host for multi-school Unified Sports events including a Unified Basketball tournament featuring six teams from area schools. Our teams also attended a Unified Basketball Tournament in Shelton on March 7, 2023 and will compete in Cheshire on March 15, 2023.

March 2023

## Feb Ticket Summary

Tickets addressed and closed: 43

Tickets open: 6

## HS Student Help Desk

Students helped: 384

Amity Regional School District No. 5

25 Newton Road

Woodbridge, CT 06525

Phone: 203-397-4817

Fax: 203-397-4864



# Amity Regional School District No. 5

## Technology Department Monthly Report

### Completed Projects:

- SIP trunk install and configuration for phone system to enable enhanced 911 capabilities
- Install vape sensors in all-access restrooms in HS

### Projects in process:

- Working with Facilities and Building Admin to help plan for upgrades to the Lecture Hall to better serve the District's needs moving forward
- All weather stadium data and power installation
  - Steps left are to anchor cabinets and run final conduit between junction boxes and cabinets
  - Need to run power to cabinets to support the climate control units and power needs of the switches
- Schoology early adopters initiative has begun, selected teachers are testing Schoology and providing feedback in preparation for training staff for full implementation in the Fall of 2023
- Doing a full audit of the registration process through PowerSchool to be followed by an update to address any inefficiencies in the current system

### Upcoming projects:

- Identified new solution to address the need for a mobile door access control system to allow security to answer and respond to requests for door access while away from their desk.
  - Currently awaiting delivery of the camera modules ETA Early March

CLEAN

SAFE

HEALTHY

SCHOOLS

Amity Regional School  
District No. 5

25 Newton Road

Woodbridge, CT 06525

Phone: 203-397-4817

Fax: 203-397-4864



# Amity Regional School District No. 5

## Facilities Department Monthly Report

### Completed Projects:

- The picnic tables at both AMSO and AMSB were moved over February break to the new outdoor structures.
- Roof leak repairs were completed at both AMSB and AMSO.
- New acoustical sound dampening panels were installed in the presentation room at ARHS.
- Annual boiler inspections were completed.

### Projects in Process:

- Bids went out at the beginning of January for three projects at ARHS, the chilled water piping, the curtain wall frame and the lecture hall remodel. Bids were received and reviewed and contracts were awarded. The lecture hall remodel and the chilled water piping are scheduled to start during April break. The curtain wall frame is scheduled for a early June start after school is out.
- All indoor lighting fixtures in AMSO and AMSB are being re-lamped with different bulbs due to problems with existing bulbs.
- The glycol loop at AMSO is still continuing to be flushed and cleaned with the new filter in place.
- The DESIGO building management system software upgrade for ARHS is wrapping up. All aspects have been completed with the exception of certain graphics still need to be developed as well as training on the new system. The first round of training was held in February with another scheduled later this month.
- A meeting was held with the Woodbridge planning and zoning committee to discuss and get approval to add an additional eight parking lot lights from the football field out to North Pease Road. We are awaiting the final decision from P&Z before we can move forward.
- The gym roof and wall panel project for both middle schools was scheduled to go out to bid last month but was delayed. It is on schedule to go out to bid this month.
- The patio replacement project for ARHS went out to bid late February, seven bids were received. We are reviewing bids and references and will award a contract mid week.

### Outstanding issues to be addressed:

- The high school track water retention issue is still being reviewed.

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



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TO: Dr. Jennifer Byars, Superintendent of Schools

FROM: Theresa Lumas, Director of Finance & Administration

DATE: March 6, 2023

RE: 2023-2024 Budget

Budget presentations were made to the Amity Finance Committee, all three Town Finance Boards, and the Amity Board of Education throughout January and February. The Superintendent's original proposed budget represented a 2.93% increase over the current year budget. This reflected increases in staff wages of 2.92% and benefit increases of nearly 11%. Both of these items comprise 67% of the budget. Special Education costs are down over 10% as a result of changes in students' needs, programming, placements, and transportation we are experiencing this year and expect for next year for student's needs.

We continued to work with the administrative team to identify further reductions to the budget. The latest review includes changes to benefits, current staffing, special education needs, and updated revenue estimates.

The Governor signed an emergency authorization to increase the reimbursement rate for special education excess costs. The reimbursement rate for the current year was increased to 85%. Based on that action, we estimated next year's reimbursement rate will be 80%, up from 70%. The revised estimate for excess cost grant increases other revenue sources by \$221,707. This helps to offset the increase to the member towns.

At a Special Meeting held on February 27, 2023, a revised budget was proposed to the AFC that represented a 2.56% increase of expenses. Expenses including medical benefits (\$101,000), defined contribution benefits (\$25,000), special education outplacements (\$32,648), additional referendum costs (\$24,870) and salaries (\$14,858) accounted for total reductions of \$198,376.

Following that presentation, the Amity Finance Committee recommend a 2.25% budget to the Board of Education.

The Administration looked for ways to further reduce the budget as requested by the AFC. The reductions identified below reduce the budget request to the AFC recommended 2.25% budget increase:

- Remove the replacement of the digital media labs at both middle schools, (\$13,600);
- Remove the replacement of the tech-ed labs at both middle schools (\$32,000);
- Remove the replacement of 4 promethean boards for ARHS classrooms, (\$24,800);
- Reduce equipment for digital art class, (\$2,000)
- **All of the above items will be purchased in FY23 using anticipated Open Choice funds**

Additionally:

- Reduce defined contributions by another \$17,500 for a total use of \$42,500 in forfeiture funds. There will be \$20,000 available for the 2024-2025 budget to offset a large budget increase on this line.
- Purchase High School French and Chinese texts from current budget, \$9,477.
- Fund the in-school suspension tutor from Open Choice funds anticipated next year, \$37,000.
- Reduce certified staff by 1.0 FTE at the high school during scheduling process, \$60,042.
- *Increase* special education outplacements by \$32,648

On March 1, 2023, after making all the proposed reductions, the Director of Special Education was notified of a new outplacement beginning this spring for a 6<sup>th</sup> grade student. The February 27<sup>th</sup> proposed cut of \$32,648 conflicts with this new information and therefore we reinstated these funds.

The net reductions total \$163,771 and bring the increase down to 2.25%.

The attached summary reflects the change in member town allocations due to both factors of additional other revenue and changes in expenses. Below are the motions for consideration by the Board of Education.

***Motions:***

***The Amity Board of Education:***

***... Move to approve the Superintendent's Proposed Budget for fiscal year 2023-24 at 2.25%, in the gross amount of \$54,552,759 and the net amount of \$53,388,441.***

***Explanatory Text:***

***Move to authorize Amity Regional School District No. 5 to prepare an Explanatory Text for the Budget Referendum Question: BE IT RESOLVED, that the Secretary of the Board of Education of Amity Regional School District No. 5 is authorized to prepare, print, and distribute a concise explanatory text of the budget referendum question which, by vote of the member towns, which text shall not advocate either the approval or disapproval of the question and shall otherwise be prepared in accordance with Connecticut General Statutes Section 9-369b.***

**AMITY REGIONAL SCHOOL DISTRICT NO. 5  
REVENUES AND EXPENDITURES  
2023-2024 REQUESTED BUDGET**

**SUPERINTENDENT'S REQUEST**

		<b>COLUMN 1</b>	<b>COLUMN 2</b>	<b>COLUMN 5</b>	<b>COLUMN 4</b>	<b>COLUMN 5</b>	<b>COLUMN 6</b>
		<b>2021-2022</b>	<b>2022-2023</b>	<b>FEB 23</b>	<b>2023-2024</b>	<b>VAR. \$ TO</b>	<b>VAR. %</b>
<b>LINE</b>	<b>CATEGORY</b>	<b>ACTUAL</b>	<b>BUDGET</b>	<b>FORECAST</b>	<b>BUDGET</b>	<b>BUDGET</b>	<b>TO BUDGET</b>
1	MEMBER TOWN ALLOCATIONS	49,760,789	52,349,608	52,349,608	53,388,441	1,038,833	1.98%
1a	MEMBER TOWN ALLOCATION CREDIT				0		
2	OTHER REVENUE	155,137	114,296	207,902	162,413	48,117	42.10%
3	OTHER STATE GRANTS	1,081,353	844,861	1,026,343	965,905	121,044	14.33%
4	MISCELLANEOUS INCOME	23,374	41,040	43,872	36,000	(5,040)	-12.28%
5	BUILDING RENOVATION GRANTS	0	0	0	0	0	0.00%
6	<b>TOTAL REVENUES</b>	<b>51,514,673</b>	<b>53,349,805</b>	<b>53,627,725</b>	<b>54,552,759</b>	<b>1,202,954</b>	<b>2.25%</b>
7	SALARIES	27,429,917	28,830,023	28,559,418	29,742,117	912,094	3.16%
8	BENEFITS	5,464,945	6,046,203	6,154,000	6,540,201	493,998	8.17%
9	PURCHASED SERVICES	8,856,448	10,234,922	9,369,970	9,863,306	(371,616)	-3.63%
10	DEBT SERVICE	4,453,835	4,485,716	4,485,716	4,417,942	(67,774)	-1.51%
11	SUPPLIES (INCLUDING UTILITIES)	3,159,639	3,157,931	3,166,139	3,333,435	175,504	5.56%
12	EQUIPMENT	130,142	86,552	129,670	82,530	(4,022)	-4.65%
13	IMPROVEMENTS / CONTINGENCY	340,143	308,000	186,704	373,500	65,500	21.27%
14	DUES AND FEES	121,969	200,458	196,871	199,728	(730)	-0.36%
15	TRANSFER ACCOUNT	929,175	0	0	0	0	0.00%
16	<b>TOTAL EXPENDITURES</b>	<b>50,886,213</b>	<b>53,349,805</b>	<b>52,248,488</b>	<b>54,552,759</b>	<b>1,202,954</b>	<b>2.25%</b>
17	<b>SUBTOTAL</b>	<b>628,463</b>	<b>0</b>	<b>1,379,237</b>	<b>0</b>	<b>0</b>	<b>0.00%</b>
18	CANCELLATION OF PRIOR YEAR'S ENCUMBRANCES	83,471	0	0	0	0	0.00%
19	DESIGNATED FOR SUBSEQUENT YEAR'S BUDGET	0	0	0	0	0	0.00%
20	<b>NET BALANCE / (DEFICIT)</b>	<b>711,934</b>	<b>0</b>	<b>1,379,237</b>	<b>0</b>	<b>0</b>	<b>0.00%</b>
21	<b>AVERAGE DAILY MEMBERSHIP</b>	<b>2,209</b>	<b>2,166</b>	<b>2,080</b>	<b>2,080</b>	<b>(86)</b>	<b>-3.97%</b>
22	<b>PER PUPIL EXPENDITURE</b>	<b>19,462</b>	<b>20,743</b>	<b>21,194</b>	<b>22,213</b>	<b>1,470</b>	<b>7.08%</b>

**AMITY REGIONAL SCHOOL DISTRICT NO. 5  
REVENUES AND EXPENDITURES  
2023-2024 REQUESTED BUDGET**

**SUPERINTENDENT'S REQUEST**

		<b>COLUMN 1</b>	<b>COLUMN 2</b>	<b>COLUMN 5</b>	<b>COLUMN 4</b>	<b>COLUMN 5</b>	<b>COLUMN 6</b>
		<b>2021-2022</b>	<b>2022-2023</b>	<b>FEB 23</b>	<b>2023-2024</b>	<b>VAR. \$ TO</b>	<b>VAR. %</b>
<b>LINE</b>	<b>CATEGORY</b>	<b>ACTUAL</b>	<b>BUDGET</b>	<b>FORECAST</b>	<b>BUDGET</b>	<b>BUDGET</b>	<b>TO BUDGET</b>
1	BETHANY ALLOCATION	8,983,609	8,918,279	8,918,279	9,317,351	399,072	4.47%
2	ORANGE ALLOCATION	25,236,005	26,367,974	26,367,974	26,103,744	(264,230)	-1.00%
3	WOODBIDGE ALLOCATION	16,275,624	17,063,355	17,063,355	17,967,346	903,991	5.30%
4	<b>MEMBER TOWN ALLOCATIONS</b>	<b>50,495,238</b>	<b>52,349,608</b>	<b>52,349,608</b>	<b>53,388,441</b>	<b>1,038,833</b>	<b>1.98%</b>
5	ADULT EDUCATION	4,341	4,000	4,000	4,000	0	0.00%
6	PARKING INCOME	31,146	32,400	32,400	32,400	0	0.00%
7	INVESTMENT INCOME	4,975	5,000	40,000	20,000	15,000	300.00%
8	ATHLETICS	26,516	24,000	24,000	24,000	0	0.00%
9	TUITION REVENUE	44,034	25,496	85,402	58,613	33,117	129.89%
10	TRANSPORTATION INCOME	19,500	23,400	22,100	23,400	0	0.00%
11	TRANSPORTATION BOWA AGREEMENT	0	0	0	0	0	0.00%
12	<b>OTHER REVENUE</b>	<b>130,512</b>	<b>114,296</b>	<b>207,902</b>	<b>162,413</b>	<b>48,117</b>	<b>42.10%</b>
14	SPECIAL EDUCATION GRANTS	843,114	844,861	1,026,343	965,905	121,044	14.33%
15	<b>OTHER STATE GRANTS</b>	<b>843,114</b>	<b>844,861</b>	<b>1,026,343</b>	<b>965,905</b>	<b>121,044</b>	<b>14.33%</b>
16	RENTAL INCOME	23,158	18,000	24,000	18,000	0	0.00%
17	INTERGOVERNMENTAL	4,893	5,040	1,872	0	(5,040)	-100.00%
18	OTHER REVENUE	17,758	18,000	18,000	18,000	0	0.00%
19	TRANSFER IN	0	0	0	0	0	0.00%
20	<b>MISCELLANEOUS INCOME</b>	<b>45,809</b>	<b>41,040</b>	<b>43,872</b>	<b>36,000</b>	<b>(5,040)</b>	<b>-12.28%</b>
21	<b>BUILDING RENOVATION GRANTS</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0.00%</b>
22	<b>TOTAL REVENUES</b>	<b>51,514,673</b>	<b>53,349,805</b>	<b>53,627,725</b>	<b>54,552,759</b>	<b>1,202,954</b>	<b>2.25%</b>

**AMITY REGIONAL SCHOOL DISTRICT NO. 5  
REVENUES AND EXPENDITURES  
2023-2024 REQUESTED BUDGET**

**SUPERINTENDENT'S REQUEST**

		<b>COLUMN 1</b>	<b>COLUMN 2</b>	<b>COLUMN 5</b>	<b>COLUMN 4</b>	<b>COLUMN 5</b>	<b>COLUMN 6</b>
		<b>2021-2022</b>	<b>2022-2023</b>	<b>FEB 23</b>	<b>2023-2024</b>	<b>VAR. \$ TO</b>	<b>VAR. %</b>
<b>LINE</b>	<b>CATEGORY</b>	<b>ACTUAL</b>	<b>BUDGET</b>	<b>FORECAST</b>	<b>BUDGET</b>	<b>BUDGET</b>	<b>TO BUDGET</b>
1	5111-CERTIFIED SALARIES	22,456,125	23,647,192	23,461,462	24,371,668	724,476	3.06%
2	5112-CLASSIFIED SALARIES	4,973,792	5,182,831	5,097,956	5,370,449	187,618	3.62%
3	<b>SALARIES</b>	<b>27,429,917</b>	<b>28,830,023</b>	<b>28,559,418</b>	<b>29,742,117</b>	<b>912,094</b>	<b>3.16%</b>
4	5200-MEDICARE - ER	381,832	423,336	423,336	432,831	9,495	2.24%
5	5210-FICA - ER	301,888	315,346	315,346	341,251	25,905	8.21%
6	5220-WORKERS' COMPENSATION	152,365	175,153	144,706	178,436	3,283	1.87%
7	5255-MEDICAL & DENTAL INSURANCE	3,647,858	4,018,260	4,018,260	4,364,277	346,017	8.61%
8	5860-OPEB TRUST	0	155,474	267,232	265,890	110,416	100.00%
9	5260-LIFE INSURANCE	46,418	55,110	59,735	63,986	8,876	16.11%
10	5275-DISABILITY INSURANCE	10,736	11,757	12,873	12,062	305	2.59%
11	5280-PENSION PLAN - CLASSIFIED	764,395	725,924	725,924	726,430	506	0.07%
12	5281-DEFINED CONTRIBUTION RETIREMENT PLAN	145,496	153,143	153,143	144,838	(8,305)	-5.42%
13	5282-RETIREMENT SICK LEAVE - CERT	0	0	0	0	0	0.00%
14	5283-RETIREMENT SICK LEAVE - CLASS	0	0	0	0	0	0.00%
15	5284-SEVERANCE PAY - CERTIFIED	0	0	0	0	0	0.00%
16	5290-UNEMPLOYMENT COMPENSATION	12,498	10,500	31,245	8,000	(2,500)	-23.81%
17	5291-CLOTHING ALLOWANCE	1,459	2,200	2,200	2,200	0	0.00%
18	<b>BENEFITS</b>	<b>5,464,945</b>	<b>6,046,203</b>	<b>6,154,000</b>	<b>6,540,201</b>	<b>493,998</b>	<b>8.17%</b>
19	5322-INSTRUCTIONAL PROG IMPROVEMENT	28,159	10,000	15,007	60,750	50,750	507.50%
20	5327-DATA PROCESSING	105,023	131,078	131,078	148,943	17,865	13.63%
21	5330-OTHER PROFESSIONAL & TECHNICAL SRVC	1,853,092	2,063,594	2,507,527	2,129,048	65,454	3.17%
22	5440-RENTALS - LAND, BLDG, EQUIPMENT	82,148	116,525	116,525	117,846	1,321	1.13%
23	5510-PUPIL TRANSPORTATION	3,441,389	3,933,934	3,679,496	3,931,690	(2,244)	-0.06%
24	5521-GENERAL LIABILITY INSURANCE	282,790	278,907	320,326	308,963	30,056	10.78%
25	5550-COMMUNICATIONS: TEL, POST, ETC.	117,699	114,492	114,492	114,805	313	0.27%
26	5560-TUITION EXPENSE	2,867,711	3,495,200	2,394,327	2,963,731	(531,469)	-15.21%
27	5590-OTHER PURCHASED SERVICES	78,437	91,192	91,192	87,530	(3,662)	-4.02%
28	<b>PURCHASED SERVICES</b>	<b>8,856,448</b>	<b>10,234,922</b>	<b>9,369,970</b>	<b>9,863,306</b>	<b>(371,616)</b>	<b>-3.63%</b>
29	5830-INTEREST	788,835	788,835	788,835	523,986	(264,849)	-33.57%
30	5910-REDEMPTION OF PRINCIPAL	3,665,000	3,696,881	3,696,881	3,893,956	197,075	5.33%
31	<b>DEBT SERVICE</b>	<b>4,453,835</b>	<b>4,485,716</b>	<b>4,485,716</b>	<b>4,417,942</b>	<b>(67,774)</b>	<b>-1.51%</b>
32	5410-UTILITIES, EXCLUDING HEAT	588,882	709,704	709,704	710,802	1,098	0.15%
33	5420-REPAIRS, MAINTENANCE & CLEANING	943,020	731,680	718,961	773,846	42,166	5.76%

**AMITY REGIONAL SCHOOL DISTRICT NO. 5  
REVENUES AND EXPENDITURES  
2023-2024 REQUESTED BUDGET**

**SUPERINTENDENT'S REQUEST**

		<b>COLUMN 1</b>	<b>COLUMN 2</b>	<b>COLUMN 5</b>	<b>COLUMN 4</b>	<b>COLUMN 5</b>	<b>COLUMN 6</b>
		<b>2021-2022</b>	<b>2022-2023</b>	<b>FEB 23</b>	<b>2023-2024</b>	<b>VAR. \$ TO</b>	<b>VAR. %</b>
<b>LINE</b>	<b>CATEGORY</b>	<b>ACTUAL</b>	<b>BUDGET</b>	<b>FORECAST</b>	<b>BUDGET</b>	<b>BUDGET</b>	<b>TO BUDGET</b>
34	5611-INSTRUCTIONAL SUPPLIES	328,840	366,812	365,392	405,738	38,926	10.61%
35	5613-MAINTENANCE/CUSTODIAL SUPPLIES	189,616	225,305	225,305	240,320	15,015	6.66%
36	5620-OIL USED FOR HEATING	40,302	47,500	47,500	64,900	17,400	36.63%
37	5621-NATURAL GAS	73,394	69,941	84,403	115,245	45,304	64.77%
38	5627-TRANSPORTATION SUPPLIES	102,352	143,809	143,809	188,515	44,706	31.09%
39	5641-TEXTS & DIGITAL RESOURCES	237,915	154,742	154,742	131,085	(23,657)	-15.29%
40	5642-LIBRARY BOOKS & PERIODICALS	20,852	20,857	16,023	20,550	(307)	-1.47%
41	5690-OTHER SUPPLIES	634,466	241,071	253,790	246,699	5,628	2.33%
42	5695-TECHNOLOGY SUPPLIES	0	446,510	446,510	435,735	(10,775)	100.00%
43	<b>SUPPLIES (INCLUDING UTILITIES)</b>	<b>3,159,639</b>	<b>3,157,931</b>	<b>3,166,139</b>	<b>3,333,435</b>	<b>175,504</b>	<b>5.56%</b>
44	5730-EQUIPMENT - NEW	92,453	13,012	13,012	1,000	(12,012)	-92.31%
45	5731-EQUIPMENT - REPLACEMENT	37,689	5,980	49,098	5,000	(980)	-16.39%
46	5732-EQUIPMENT - TECHNOLOGY-NEW	0	63,960	63,960	21,830	(42,130)	100.00%
47	5733-EQUIPMENT - TECHNOLOGY REPLACEMENT	0	3,600	3,600	54,700	51,100	100.00%
48	<b>EQUIPMENT</b>	<b>130,142</b>	<b>86,552</b>	<b>129,670</b>	<b>82,530</b>	<b>(4,022)</b>	<b>-4.65%</b>
49	5715-IMPROVEMENTS TO BUILDING	67,775	19,000	89,935	29,500	10,500	55.26%
50	5715-FACILITIES CONTINGENCY	100,000	100,000	100,000	100,000	0	0.00%
49b	TRSF. FROM FACILITIES CONTINGENCY	(100,000)	0	(100,000)	0	0	0
51	5720-IMPROVEMENTS TO SITES	272,368	39,000	39,000	94,000	55,000	141.03%
52	5850-CONTINGENCY	150,000	150,000	150,000	150,000	0	0.00%
53	TRSF. FROM CONTINGENCY TO OTHER ACCTS.	(150,000)	0	(92,231)	0	0	0.00%
54	<b>IMPROVEMENTS / CONTINGENCY</b>	<b>340,143</b>	<b>308,000</b>	<b>186,704</b>	<b>373,500</b>	<b>65,500</b>	<b>21.27%</b>
55	5580-STAFF TRAVEL	8,203	21,700	18,800	24,650	2,950	13.59%
56	5581-TRAVEL - CONFERENCES	32,992	70,475	69,788	66,380	(4,095)	-5.81%
57	5810-DUES & FEES	80,774	108,283	108,283	108,698	415	0.38%
58	<b>DUES AND FEES</b>	<b>121,969</b>	<b>200,458</b>	<b>196,871</b>	<b>199,728</b>	<b>(730)</b>	<b>-0.36%</b>
59	<b>5856-TRANSFER ACCOUNT</b>	<b>929,175</b>	<b>0</b>	<b>0</b>		<b>0</b>	<b>0.00%</b>
60	<b>TOTAL EXPENDITURES</b>	<b>50,886,213</b>	<b>53,349,805</b>	<b>52,248,488</b>	<b>54,552,759</b>	<b>1,202,954</b>	<b>2.25%</b>

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

		<b>COLUMN 1</b>	<b>COLUMN 2</b>	<b>COLUMN 3</b>	<b>COLUMN 4</b>	<b>COLUMN 5</b>	<b>COLUMN 6</b>	<b>COL 7</b>
		<b>2021-2022</b>	<b>2022-2023</b>	<b>JAN 23</b>	<b>CHANGE</b>	<b>FEB 23</b>	<b>VARIANCE</b>	<b>FAV</b>
<b>LINE</b>	<b>CATEGORY</b>	<b>ACTUAL</b>	<b>BUDGET</b>	<b>FORECAST</b>	<b>INCR./ (DECR.)</b>	<b>FORECAST</b>	<b>OVER/(UNDER)</b>	<b>UNF</b>
1	MEMBER TOWN ALLOCATIONS	50,495,238	52,349,608	52,349,608	0	52,349,608	0	FAV
2	OTHER REVENUE	130,512	114,296	202,902	5,000	207,902	93,606	FAV
3	OTHER STATE GRANTS	843,114	844,861	592,318	434,025	1,026,343	181,482	FAV
4	MISCELLANEOUS INCOME	45,809	41,040	37,872	6,000	43,872	2,832	FAV
5	BUILDING RENOVATION GRANTS	0	0	0	0	0	0	FAV
6	<b>TOTAL REVENUES</b>	<b>51,514,673</b>	<b>53,349,805</b>	<b>53,182,700</b>	<b>445,025</b>	<b>53,627,725</b>	<b>277,920</b>	<b>FAV</b>
7	SALARIES	27,429,917	28,830,023	28,556,466	2,952	28,559,418	(270,605)	FAV
8	BENEFITS	5,464,945	6,046,203	6,030,487	123,513	6,154,000	107,797	UNF
9	PURCHASED SERVICES	8,856,448	10,234,922	9,295,768	74,202	9,369,970	(864,952)	FAV
10	DEBT SERVICE	4,453,835	4,485,716	4,485,716	0	4,485,716	0	FAV
11	SUPPLIES (INCLUDING UTILITIES)	3,159,639	3,157,931	3,166,139	0	3,166,139	8,208	UNF
12	EQUIPMENT	130,142	86,552	129,670	0	129,670	43,118	UNF
13	IMPROVEMENTS / CONTINGENCY	340,143	308,000	186,704	0	186,704	(121,296)	FAV
14	DUES AND FEES	121,969	200,458	196,871	0	196,871	(3,587)	FAV
15	TRANSFER ACCOUNT	929,175	0	0	0	0	0	FAV
16	<b>TOTAL EXPENDITURES</b>	<b>50,886,213</b>	<b>53,349,805</b>	<b>52,047,821</b>	<b>200,667</b>	<b>52,248,488</b>	<b>(1,101,317)</b>	<b>FAV</b>
17	<b>SUBTOTAL</b>	<b>628,466</b>	<b>0</b>	<b>1,134,879</b>	<b>244,358</b>	<b>1,379,237</b>	<b>1,379,237</b>	<b>FAV</b>
18	PLUS: CANCELLATION OF PRIOR YEAR'S ENCUMBRANCES	<b>83,471</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>FAV</b>
19	DESIGNATED FOR SUBSEQUENT YEAR'S BUDGET:	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>FAV</b>
20	<b>NET BALANCE / (DEFICIT)</b>	<b>711,937</b>	<b>0</b>	<b>1,134,879</b>	<b>244,358</b>	<b>1,379,237</b>	<b>1,379,237</b>	<b>FAV</b>

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

		<b>COLUMN 1</b>	<b>COLUMN 2</b>	<b>COLUMN 3</b>	<b>COLUMN 4</b>	<b>COLUMN 5</b>	<b>COLUMN 6</b>	<b>COL 7</b>
		<b>2021-2022</b>	<b>2022-2023</b>	<b>JAN 23</b>	<b>CHANGE</b>	<b>FEB 23</b>	<b>VARIANCE</b>	<b>FAV</b>
<b>LINE</b>	<b>CATEGORY</b>	<b>ACTUAL</b>	<b>BUDGET</b>	<b>FORECAST</b>	<b>INCR./(DECR.)</b>	<b>FORECAST</b>	<b>OVER/(UNDER)</b>	<b>UNF</b>
1	BETHANY ALLOCATION	8,983,609	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	WOODBRIAGE ALLOCATION	16,275,624	17,063,355	17,063,355	0	17,063,355	0	FAV
4	<b>MEMBER TOWN ALLOCATIONS</b>	<b>50,495,238</b>	<b>52,349,608</b>	<b>52,349,608</b>	<b>0</b>	<b>52,349,608</b>	<b>0</b>	<b>FAV</b>
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	35,000	5,000	40,000	35,000	FAV
9	ATHLETICS	26,516	24,000	24,000	0	24,000	0	FAV
10	TUITION REVENUE	44,034	25,496	85,402	0	85,402	59,906	FAV
11	TRANSPORTATION INCOME	19,500	23,400	22,100	0	22,100	(1,300)	UNF
12	TRANSPORTATION BOWA AGREEMENT	0	0	0	0	0	0	FAV
13	<b>OTHER REVENUE</b>	<b>130,512</b>	<b>114,296</b>	<b>202,902</b>	<b>5,000</b>	<b>207,902</b>	<b>93,606</b>	<b>FAV</b>
14	OTHER STATE GRANT	0	0	0	0	0	0	FAV
15	SPECIAL EDUCATION GRANTS	843,114	844,861	592,318	434,025	1,026,343	181,482	FAV
16	<b>OTHER STATE GRANTS</b>	<b>843,114</b>	<b>844,861</b>	<b>592,318</b>	<b>434,025</b>	<b>1,026,343</b>	<b>181,482</b>	<b>FAV</b>
17	RENTAL INCOME	23,158	18,000	18,000	6,000	24,000	6,000	FAV
18	INTERGOVERNMENTAL REVENUE	4,893	5,040	1,872	0	1,872	(3,168)	UNF
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	<b>MISCELLANEOUS INCOME</b>	<b>45,809</b>	<b>41,040</b>	<b>37,872</b>	<b>6,000</b>	<b>43,872</b>	<b>2,832</b>	<b>FAV</b>
22	<b>BUILDING RENOVATION GRANTS</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>FAV</b>
23	<b>TOTAL REVENUES</b>	<b>51,514,673</b>	<b>53,349,805</b>	<b>53,182,700</b>	<b>445,025</b>	<b>53,627,725</b>	<b>277,920</b>	<b>FAV</b>

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

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

		<b>COLUMN 1</b>	<b>COLUMN 2</b>	<b>COLUMN 3</b>	<b>COLUMN 4</b>	<b>COLUMN 5</b>	<b>COLUMN 6</b>	<b>COL 7</b>
		<b>2021-2022</b>	<b>2022-2023</b>	<b>JAN 23</b>	<b>CHANGE</b>	<b>FEB 23</b>	<b>VARIANCE</b>	<b>FAV</b>
<b>LINE</b>	<b>CATEGORY</b>	<b>ACTUAL</b>	<b>BUDGET</b>	<b>FORECAST</b>	<b>INCR./(DECR.)</b>	<b>FORECAST</b>	<b>OVER/(UNDER)</b>	<b>UNF</b>
1	5111-CERTIFIED SALARIES	22,456,125	23,647,192	23,461,462	0	23,461,462	(185,730)	FAV
2	5112-CLASSIFIED SALARIES	4,973,792	5,182,831	5,095,004	2,952	5,097,956	(84,875)	FAV
3	<b>SALARIES</b>	<b>27,429,917</b>	<b>28,830,023</b>	<b>28,556,466</b>	<b>2,952</b>	<b>28,559,418</b>	<b>(270,605)</b>	<b>FAV</b>
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	144,706	0	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	111,758	267,232	111,758	UNF
9	5260-LIFE INSURANCE	46,418	55,110	59,735	0	59,735	4,625	UNF
10	5275-DISABILITY INSURANCE	10,736	11,757	12,873	0	12,873	1,116	UNF
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	19,490	11,755	31,245	20,745	UNF
16	5291-CLOTHING ALLOWANCE	1,459	2,200	2,200	0	2,200	0	FAV
17	<b>BENEFITS</b>	<b>5,464,945</b>	<b>6,046,203</b>	<b>6,030,487</b>	<b>123,513</b>	<b>6,154,000</b>	<b>107,797</b>	<b>UNF</b>
18	5322-INSTRUCTIONAL PROG IMPROVEMENT	28,159	10,000	15,007	0	15,007	5,007	UNF
19	5327-DATA PROCESSING	105,023	131,078	131,078	0	131,078	0	FAV
20	5330-PROFESSIONAL & TECHNICAL SRVC	1,853,092	2,063,594	2,457,447	50,080	2,507,527	443,933	UNF
21	5440-RENTALS - LAND, BLDG, EQUIPMENT	82,148	116,525	116,525	0	116,525	0	FAV
22	5510-PUPIL TRANSPORTATION	3,441,389	3,933,934	3,660,164	19,332	3,679,496	(254,438)	FAV
23	5521-GENERAL LIABILITY INSURANCE	282,790	278,907	320,326	0	320,326	41,419	UNF
24	5550-COMMUNICATIONS: TEL, POST, ETC.	117,699	114,492	114,492	0	114,492	0	FAV
25	5560-TUITION EXPENSE	2,867,711	3,495,200	2,389,537	4,790	2,394,327	(1,100,873)	FAV
26	5590-OTHER PURCHASED SERVICES	78,437	91,192	91,192	0	91,192	0	FAV
27	<b>PURCHASED SERVICES</b>	<b>8,856,448</b>	<b>10,234,922</b>	<b>9,295,768</b>	<b>74,202</b>	<b>9,369,970</b>	<b>(864,952)</b>	<b>FAV</b>

Column 7: FAV=Favorable Variance

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

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

		<b>COLUMN 1</b>	<b>COLUMN 2</b>	<b>COLUMN 3</b>	<b>COLUMN 4</b>	<b>COLUMN 5</b>	<b>COLUMN 6</b>	<b>COL 7</b>
<b>LINE</b>	<b>CATEGORY</b>	<b>2021-2022</b>	<b>2022-2023</b>	<b>JAN 23</b>	<b>CHANGE</b>	<b>FEB 23</b>	<b>VARIANCE</b>	<b>FAV</b>
		<b>ACTUAL</b>	<b>BUDGET</b>	<b>FORECAST</b>	<b>INCR./(DECR.)</b>	<b>FORECAST</b>	<b>OVER/(UNDER)</b>	<b>UNF</b>
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	<b>DEBT SERVICE</b>	<b>4,453,835</b>	<b>4,485,716</b>	<b>4,485,716</b>	<b>0</b>	<b>4,485,716</b>	<b>0</b>	<b>FAV</b>
31	5410-UTILITIES, EXCLUDING HEAT	588,882	709,704	709,704	0	709,704	0	FAV
32	5420-REPAIRS, MAINTENANCE & CLEANING	943,020	731,680	718,961	0	718,961	(12,719)	FAV
33	5611-INSTRUCTIONAL SUPPLIES	328,840	366,812	365,392	0	365,392	(1,420)	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	84,403	0	84,403	14,462	UNF
37	5627-TRANSPORTATION SUPPLIES	102,352	143,809	143,809	0	143,809	0	FAV
38	5641-TEXTS & DIGITAL RESOURCES	237,915	154,742	154,742	0	154,742	0	FAV
39	5642-LIBRARY BOOKS & PERIODICALS	20,852	20,857	16,023	0	16,023	(4,834)	FAV
40	5690-OTHER SUPPLIES	634,466	241,071	253,790	0	253,790	12,719	UNF
41	5695-OTHER SUPPLIES-TECHNOLOGY	0	446,510	446,510	0	446,510	0	FAV
42	<b>SUPPLIES (INCLUDING UTILITIES)</b>	<b>3,159,639</b>	<b>3,157,931</b>	<b>3,166,139</b>	<b>0</b>	<b>3,166,139</b>	<b>8,208</b>	<b>UNF</b>
43	5730-EQUIPMENT - NEW	92,453	13,012	13,012	0	13,012	0	FAV
44	5731-EQUIPMENT - REPLACEMENT	37,689	5,980	49,098	0	49,098	43,118	UNF
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	<b>EQUIPMENT</b>	<b>130,142</b>	<b>86,552</b>	<b>129,670</b>	<b>0</b>	<b>129,670</b>	<b>43,118</b>	<b>UNF</b>
48	5715-IMPROVEMENTS TO BUILDING	67,775	19,000	89,935	0	89,935	70,935	UNF
48a	5715-FACILITIES CONTINGENCY	100,000	100,000	100,000	0	100,000	0	FAV
48b	TRSF. FROM FACILITIES CONTINGENCY	(100,000)	0	(100,000)	0	(100,000)	(100,000)	FAV
49	5720-IMPROVEMENTS TO SITES	272,368	39,000	39,000	0	39,000	0	FAV
50	5850-DISTRICT CONTINGENCY	150,000	150,000	150,000	0	150,000	0	FAV
50a	TRSF. FROM CONTINGENCY TO OTHER ACCTS.	(150,000)	0	(92,231)	0	(92,231)	(92,231)	FAV
50c	<b>IMPROVEMENTS / CONTINGENCY</b>	<b>340,143</b>	<b>308,000</b>	<b>186,704</b>	<b>0</b>	<b>186,704</b>	<b>(121,296)</b>	<b>FAV</b>

Column 7: FAV=Favorable Variance

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

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

		<b>COLUMN 1</b>	<b>COLUMN 2</b>	<b>COLUMN 3</b>	<b>COLUMN 4</b>	<b>COLUMN 5</b>	<b>COLUMN 6</b>	<b>COL 7</b>
		<b>2021-2022</b>	<b>2022-2023</b>	<b>JAN 23</b>	<b>CHANGE</b>	<b>FEB 23</b>	<b>VARIANCE</b>	<b>FAV</b>
<b>LINE</b>	<b>CATEGORY</b>	<b>ACTUAL</b>	<b>BUDGET</b>	<b>FORECAST</b>	<b>INCR./(DECR.)</b>	<b>FORECAST</b>	<b>OVER/(UNDER)</b>	<b>UNF</b>
51	5580-STAFF TRAVEL	8,203	21,700	18,800	0	18,800	(2,900)	FAV
52	5581-TRAVEL - CONFERENCES	32,992	70,475	69,788	0	69,788	(687)	FAV
53	5810-DUES & FEES	80,774	108,283	108,283	0	108,283	0	FAV
54	<b>DUES AND FEES</b>	<b>121,969</b>	<b>200,458</b>	<b>196,871</b>	<b>0</b>	<b>196,871</b>	<b>(3,587)</b>	<b>FAV</b>
55	<b>5856-TRANSFER ACCOUNT</b>	<i>929,175</i>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>FAV</b>
55a	<b>ESTIMATED UNSPENT BUDGETS</b>		<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>FAV</b>
56	<b>TOTAL EXPENDITURES</b>	<b>50,886,213</b>	<b>53,349,805</b>	<b>52,047,821</b>	<b>200,667</b>	<b>52,248,488</b>	<b>(1,101,317)</b>	<b>FAV</b>
<b>56</b>								
<b>Note:</b>	<b>RESTRICTED - CARRY OVER FUNDS/RETURN TO TOW</b>	<b>711,937</b>						

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



**FEBRUARY 2023**

**2022-2023 FORECAST**

**OVERVIEW**

*The projected unspent fund balance for this fiscal year is \$1,379,237 FAV previously \$1,134,879 FAV, which appears on page 1, column 6, and line 20. The unspent funds from fiscal year 2022 funds (\$711,931) were deducted from the town allocations in March. This administration will request up to 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 55 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 **\$277,920 FAV, previously \$167,105 UNF**, which appears on page 2, column 6, line 23.

**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 \$40,000 FAV, previously \$35,000 FAV.*

<b><u>Month</u></b>	<b><u>M&amp;T Bank</u></b>	<b><u>State Treasurer's Investment Fund</u></b>
July 2022	.398%	.1620%
August 2022	.398%	2.24%
September 2022	.350%	2.49%
October 2022	.400%	3.13%
November 2022	.400%	3.92%
December 2022	.400%	4.12%
January 2023	.396%	4.59%
February 2023	.400%	4.61%

**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. **Full tuition rate is \$20,142.** *We have four students at the employee reduced rate and three students at the full rate.* The actual tuition charged is higher (\$972 per year). *The forecast is \$59,906 FAV, previously \$59,906 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 \$1,300 UNF based on current data, previously \$1,300 UNF.*

**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. The changes in services provided to students and the overall number of students in programs reflects a savings in the tuition and transportation expense accounts. The reduction in costs also impact the anticipated revenue from the State. *The current estimate based on student enrollment, services and State funding is \$181,482 FAV previously \$252,333 UNF. The State increased the reimbursement rate to 85% under an emergency certification action in late February. The report reflects the most recent data filed on March 1 with the new reimbursement rate applied.*

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

The forecast is based on the budget developed on estimated payments for the fiscal year. *The forecast is \$6,000 FAV, previously neutral.*

**LINE 18 on Page 2: INTERGOVERNMENTAL INCOME:**

The forecast is based on the budget developed on historical payments. *The forecast is \$3,168 UNF previously neutral.* The agreement was paused due to a staffing shortage.

**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 *\$1,101,317 FAV, previously, \$1,301,984 FAV* which appears on page 5, column 6, line 56.

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

The forecast is based on budget. There are still vacant positions. Current turnover savings exceeded the budget by \$76,226 FAV. The vacancy factor has also exceeded the budget since several positions are filled with long-term substitutes. We continue to experience staff vacancies and are not yet fully staffed. *The account is currently forecasted at \$185,730 FAV, previously \$185,730 FAV. There is a significant increase in teacher coverages utilized to fill vacant positions.*

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

The forecast is based on budget. *There are still vacant positions across most groups, including a nurse and several paraeducators. The forecast is currently \$84,875 FAV, previously \$87,548 FAV. There is still a higher turnover rate occurring and we are not yet fully staffed.*

### 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. *Claims are running 95.1% of budget. It is important to note that if we were fully staffed it is likely our claims would be overbudget.*

**The forecast projects actual claims and fees of current employees and retirees will be neutral with the budget, however claims are more than the month-to-month forecast.**

The projected monthly budget is based on an average of five years of claims.

**CLAIMS OF CURRENT EMPLOYEES AND RETIREES**

<b>MONTH</b>	<b>2022-2023 ACTUAL</b>	<b>2022-2023 BUDGET</b>	<b>VARIANCE</b>	<b>2021-2022 ACTUAL</b>	<b>2020-2021 ACTUAL</b>
<i>JUL*</i>	\$ 34,837	\$ 416,087	\$ (381,250)	\$ 530,877	\$ 256,509
<i>AUG</i>	\$ 798,616	\$ 402,727	\$ 395,889	\$ 405,635	\$ 200,490
<i>SEP</i>	\$ 551,212	\$ 384,095	\$ 167,117	\$ 364,327	\$ 292,575
<i>OCT</i>	\$ 297,594	\$ 375,480	\$ (77,886)	\$ 341,109	\$ 293,360
<i>NOV</i>	\$ 306,068	\$ 458,947	\$ (152,879)	\$ 324,557	\$ 409,279
<i>DEC</i>	\$ 435,108	\$ 566,109	\$ (131,001)	\$ 767,843	\$ 489,999
<i>JAN</i>	\$ 311,328	\$ 353,446	\$ (42,118)	\$ 320,277	\$ 253,077
<i>FEB</i>	\$ 190,062	\$ 273,133	\$ (83,071)	\$ 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
<b>TOTALS</b>	<b>\$ 4,236,883</b>	<b>\$ 4,542,083</b>	<b>\$ (305,200)</b>	<b>\$ 4,377,753</b>	<b>\$ 3,525,507</b>

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

<b>2018-2019 ACTUAL</b>	<b>2019-2020 ACTUAL</b>	<b>2020-2021 ACTUAL</b>	<b>2021-2022 ACTUAL</b>	<b>2022-2023 FORECAST</b>
92.2%	84.1%	75.8%	97.3%	93.3%

\*Incomplete billing cycle

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

<b>MONTH</b>	<b>2022-2023 ACTUAL</b>	<b>2022-2023 BUDGET</b>	<b>VARIANCE</b>	<b>2021-2022 ACTUAL</b>	<b>2020-2021 ACTUAL</b>
<i>JUL</i>	\$ 30	\$ 49,997	\$ (49,967)	\$ 14,068	\$ 53,562
<i>AUG</i>	\$ 83,030	\$ 53,423	\$ 29,607	\$ 74,642	\$ 50,187
<i>SEP</i>	\$ 61,858	\$ 45,088	\$ 16,770	\$ 46,923	\$ 53,804
<i>OCT</i>	\$ 47,063	\$ 51,048	\$ (3,985)	\$ 47,049	\$ 55,100
<i>NOV</i>	\$ 50,445	\$ 42,200	\$ 8,245	\$ 39,556	\$ 56,242
<i>DEC</i>	\$ 52,888	\$ 39,812	\$ 13,076	\$ 51,770	\$ 55,608
<i>JAN</i>	\$ 25,978	\$ 36,118	\$ (10,140)	\$ 48,349	\$ 11,403
<i>FEB</i>	\$ 46,388	\$ 44,037	\$ 2,351	\$ 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
<b>TOTALS</b>	<b>\$ 521,981</b>	<b>\$ 516,024</b>	<b>\$ 5,957</b>	<b>\$ 561,977</b>	<b>\$ 675,061</b>

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

*The forecast is based on premiums for current staff, \$4,625 UNF, previously \$4,625 UNF.*

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

*The forecast is based is \$1,116 UNF previously, \$1,116 UNF based on current staff.*

**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 actual charges year-to-date and estimates for the remainder of the year, \$20,745 UNF, previously \$8,990 UNF.*

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

The forecast is based on budget. Two special education positions are expected to be vacant through October 2022. Consultants will be substituting until permanent replacements can be hired and to provide advanced behavioral support services for students, **\$393,853 UNF, previously, \$393,853 UNF.** A transfer was approved in November for robotics. The State has mandated every school district have a uniform inspection and evaluation of their HVAC systems conducted by a licensed professional. The estimated cost is \$113,000 for the evaluations at all three buildings. A transfer was approved in January to cover this mandate announced after the current budget was adopted. A contract approval for our current HVAC engineers was also approved to ensure we can be scheduled for the summer in order to meet compliance with the January 2024 deadline. Transfers were approved in February for special education contracted services for \$126,591. *There are additional transfers requested this month for contract services to meet special education student needs, \$50,080 UNF.*

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

The forecast is based on budget.

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

Special Education Transportation continues to fluctuate to meet student enrollment and needs. *The number of students transported each month as well as the facilities students are transported to each month varies. Net to date, the transportation accounts are \$254,438 FAV, previously, \$273,770 FAV.*

**LINE 23 on Page 3: 5521-GENERAL LIABILITY INSURANCE:** Various liability policies, including medical professional, public bond and cyber insurance renewed higher than budgeted while Student Accident insurance renewed under budget. **Account is \$41,419 UNF previously \$41,419 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. *The forecast currently reflects \$1,100,873 FAV, previously,*

**\$1,105,663 FAV for various tuitions.** Several students are returning to the District from outplacements. Vo-Ag, Vo-Tech and Magnet school enrollment has increased offsetting some of these savings. Savings are anticipated on these lines but large transfers were requested to address student needs in the District.

***Tuition for the Vo-Ag schools is \$3,351 UNF, previously \$3,351 FAV.***

	<b>FY18-19 ACTUAL</b>	<b>FY19-20 ACTUAL</b>	<b>FY20-21 ACTUAL</b>	<b>FY21-22 ACTUAL</b>	<b>FY22-23 BUDGET</b>	<b>FY22-23 FORECAST</b>
Sound	4	6	5	3	5	3(3)
Trumbull	6	4	3	1	3	3(3)
Nonnewaug	4	5	7	9	9	7(7)
Common Ground Charter HS	0	0	1	1	1	3(3)
Fairchild Wheeler	0	0	0	0	1	0(0)
Emmett O'Brien	0	0	0	0	0	2(2)
Hill Career Magnet	0	0	0	0	0	1(1)
Wintergreen Magnet	0	0	0	1	0	0(0)
Marine Science Magnet HS	0	0	0	0	0	1(1)
Eli Whitney Tech	0	0	0	0	0	0(0)
Engineering Science Magnet	1	0	0	0	0	0
Highville Charter School	1	0	0	0	0	0
<b>Totals</b>	<b>16</b>	<b>15</b>	<b>16</b>	<b>15</b>	<b>18</b>	<b>(20) 20</b>

***ECA is \$1,812 UNF, previously \$1,812 UNF.***

	<b>FY18-19 ACTUAL</b>	<b>FY19-20 ACTUAL</b>	<b>FY20-21 ACTUAL</b>	<b>FY21-22 ACTUAL</b>	<b>FY22-23 BUDGET</b>	<b>FY22-23 FORECAST</b>
<b>ECA</b>	<b>24</b>	<b>21</b>	<b>16</b>	<b>18</b>	<b>18</b>	<b>(19) 19</b>

***Public (ACES) and private out-of-district placements are \$1,106,036 FAV, previously \$1,110,826 FAV.***

	<b>FY18-19 ACTUAL</b>	<b>FY19-20 ACTUAL</b>	<b>FY20-21 ACTUAL</b>	<b>FY21-22 ACTUAL</b>	<b>FY22-23 BUDGET</b>	<b>FY22-23 FORECAST</b>
Public SPED	11	8	6	10	12	9(9)

Private SPED	22	18	27	20	24	<b>20(20)</b>
Totals	33	26	33	30	36	<b>29(29)</b>

**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>	<b>325,263</b>	263,361	<b>61,902</b>	296,292	254,686
<i>AUG</i>	<b>350,459</b>	292,763	<b>57,696</b>	321,023	299,439
<i>SEP</i>	<b>294,292</b>	313,930	<b>(19,638)</b>	314,756	285,993
<i>OCT</i>	<b>252,949</b>	295,084	<b>(42,135)</b>	272,755	248,089
<i>NOV</i>	<b>252,160</b>	269,094	<b>(16,934)</b>	256,208	238,583
<i>DEC</i>	<b>245,784</b>	274,129	<b>(28,345)</b>	259,994	240,912
<i>JAN</i>	<b>261,751</b>	283,552	<b>(21,801)</b>	257,539	249,595
FEB	280,114	280,114	-	271,979	243,774
MAR	263,718	263,718	-	255,631	246,886
APR	274,727	274,727	-	255,629	254,711
MAY	252,686	252,686	-	277,953	244,685
JUN	246,843	246,843	-	296,900	290,054
Totals	<b>3,300,746</b>	<b>3,310,001</b>	<b>(9,255)</b>	<b>3,336,659</b>	<b>3,097,407</b>

**DEGREE DAYS**

There are 3,347 degree days to date as opposed to 3,758 last year.

**LINE 32 on Page 4: 5420-REPAIRS & MAINTENANCE:** The forecast is projected to be under budget, \$12,719 FAV due to less snow removal to date, previously neutral. A transfer was approved in February from the snow removal estimates for door window coverings utilized during lockdowns. *The forecast is projected to be \$12,719 FAV.*

**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 over budget assuming costs will be 15% higher than actual FY22 costs, \$14,462 UNF.*

**LINE 40 on Page 4: 5690 OTHER SUPPLIES:**

Classroom and interior office door windows should be covered during a lockdown. Mr. Martoni researched product that are UL rate, can be installed by in-house staff, and easily accessible during a lockdown. School Safety Solution has various sized coverings for the classroom and interior office door windows. This was not a budgeted item but is a recommendation from a national conference on security. There is a transfer requested from the snow removal estimates approved in February for this purchase. *The forecast is projected to be \$12,719 UNF.*

**LINE 43 on Page 4: 5730-EQUIPMENT -NEW:**

*The forecast is projected to be neutral.*

**LINE 44 on Page 4: 5731-EQUIPMENT -REPLACEMENT:**

The Board approved a transfer \$8,296 for replacement security cameras. There are 6 cameras in the District that are not functional and need replacing. A transfer was approved in November for a scoreboard replacement at \$4,834. The account is \$43,118 UNF, previously \$13,130 UNF. A transfer was approved in December for robotics equipment.

**LINE 48a on Page 4: 5715-FACILITIES CONTINGENCY:**

The budget includes a \$100,000 contingency for unplanned, necessary facility expenditures. A transfer to professional services was approved in January to cover the cost of an unfunded State mandate to have their HVAC systems inspected and evaluated. The total cost is estimated at \$113,000. The balance in facility contingency is zero. A transfer was approved in February for the high school curtain wall at \$70,935.

**LINE 50 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 a transfer replacing 6 security cameras that are not functional. The balance in contingency is \$141,704 FAV. A transfer to professional services is requested this month to cover the cost of an unfunded State mandate to have their HVAC systems inspected and evaluated. The total cost is estimated at \$113,000 of which \$100,000 is requested from facilities contingency and the remaining \$13,000 from the general contingency. A transfer was approved in February for the high school curtain wall at \$70,935. *The balance in contingency is \$57,769 FAV.*

**LINES 51 & 52 on Page 5: 5580 & 5581-STAFF TRAVEL/CONFERENCES:**

*The forecast is projected to be neutral.*

**LINE 55 on Page 5: 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.

**LINE 56 on Page 5: CARRY OVER FUNDS:**

The line is for the carry over funds from FY22. The use of funds is based on legal guidance and may be applied to next year's budget. \$711,934 FAV. This is comprised of \$628,463 of unspent funds in FY22 and unliquidated encumbrances from FY21 of \$83,471. *The town allocations were reduced by the full amount of \$711,934 in March 2023.*

## APPENDIX A

### COST SAVINGS AND EFFICIENCIES FOR FISCAL YEAR 2022-2023

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**TOTAL ANNUAL SAVINGS TO-DATE OF: \$42,565**

**\$13,119 Cable Advisory Grant:** The Director of Technology applied for funds to purchase cameras for the redesigned lecture hall. These cameras will improve the quality of broadcasting for public meetings. The cameras will also be used in the curriculum. 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.

**\$11,000 Facilities Repairs:** Several projects were completed in-house over the summer by our staff, saving costs from outside contractors. Projects included:  
Replacing auditorium air handler motor in-house: estimated \$2,000 savings in labor;  
Refinishing art room tables: estimated \$7,000 as new tables of that type run between \$100-\$1,500 ; Dishwasher installation electrical work: estimated \$1,500 in labor;  
Installation of the rubber gym floor at AMSO, estimated \$500 in labor.

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

- Energy Savings Initiatives for the past decade  
<http://www.amityregion5.org/boe/sub-committees/finance-committee>
- District recognized CQIA Innovation Prize for Fostering a District Culture of Maximizing Cost Savings and Efficiencies  
<http://www.amityregion5.org/boe/sub-committees/finance-committee2>
- Fiscal Year 2021-22- <https://www.amityregion5.org/boe/sub-committees/finance-committee>
- 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).

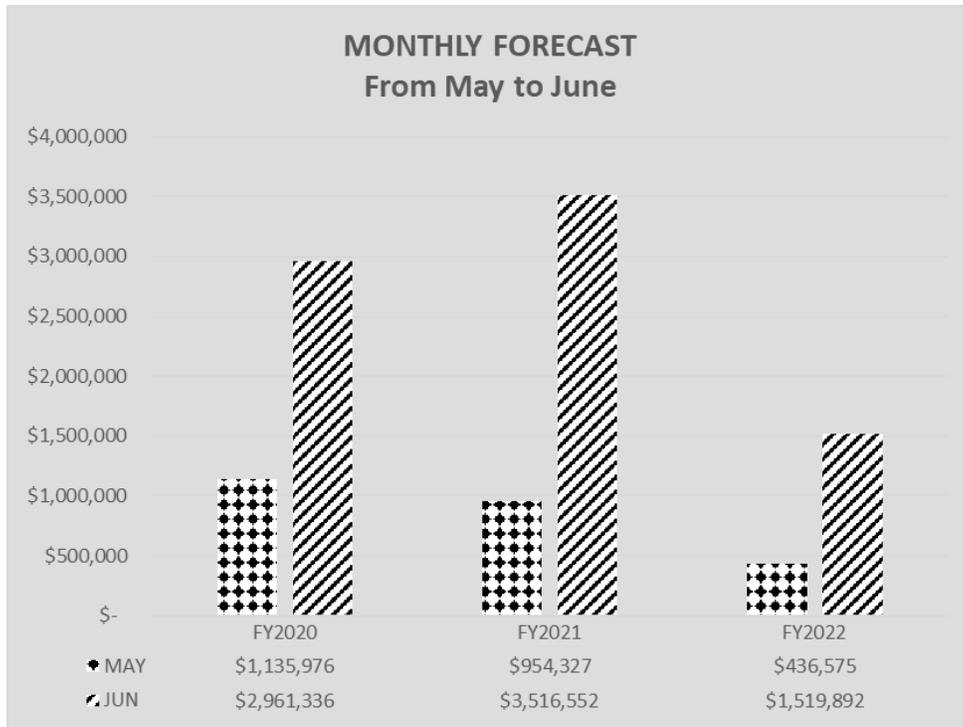
Revenues can be most impacted by decisions made at the State level for Special Education and Transportation grants. We have seen the reimbursement rate change in mid-year.

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 Govenor had not announced if schools would reopen prior to the end of the school year. School was eventually cancelled for the remainder of the year and almost all accounts were impacted. The changes from one month to the next month were, as follows:

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

- **\$296,642:** Medical & dental claims were lower due to the COVID-19 global pandemic. Routine office visits and medical tests were postponed all spring across the region. Since we are self-insured, actual claims are not known until the end of the fiscal year. Unemployment claims, though high were lower than May's estimate. The District has not experienced claims of this magnitude and estimating the actual costs were difficult. Many claims were in dispute. The change was \$26,000 FAV.
- **\$155,607** Purchased services were lower due to the COVID-19 global pandemic. There were no athletic contests, which reduced the annual number of game day staff and officials paid. Less need for printed materials, postage, end of year celebrations, 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 audited 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. The Board approved \$929,175 or 1.80% in August 2022.

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

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

The audited fund balance for 2019-2020 is \$1,950,777, 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.

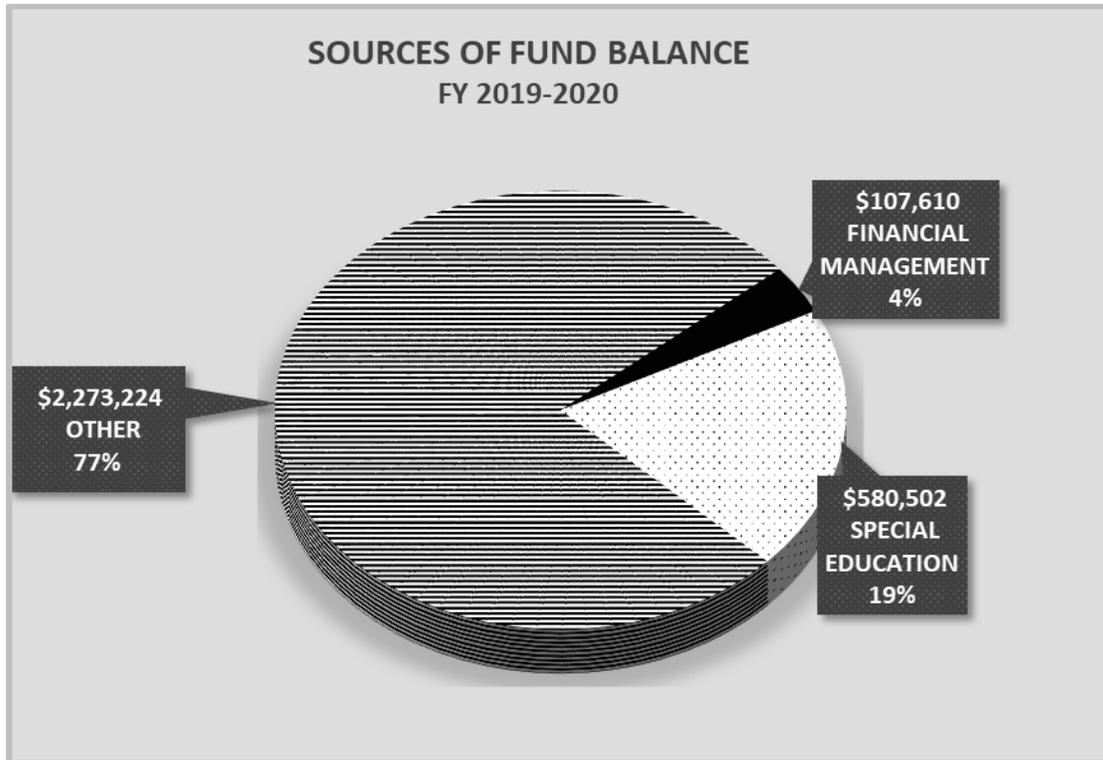
**\$93,339 UTILITIES (OTHER):** A mild winter combined with fuel cell operating properly to supply heat generated savings of \$17,731 FAV. Electricity usage was down due to the reduced occupancy in buildings, \$70,089 FAV.

**\$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.

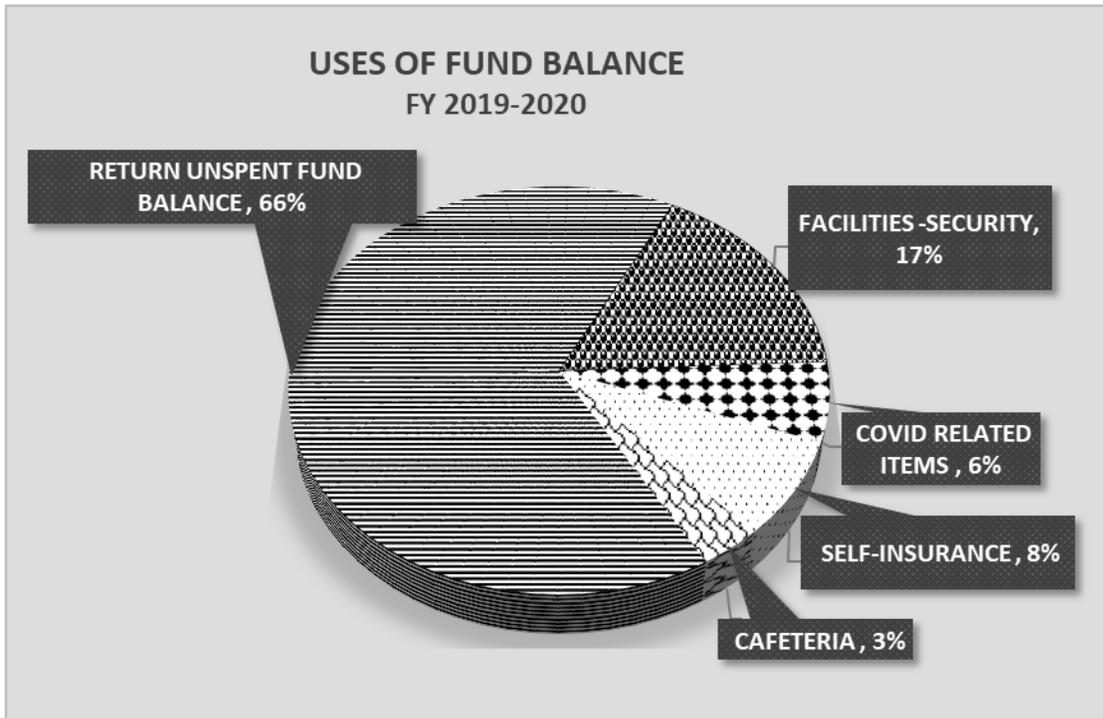
**\$515,077 END OF YEAR PURCHASES (EOY):**

**\$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
<b>Total</b>	<b>\$1,950,777</b>

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 30<sup>th</sup> but not yet billed. The final quarter of FY20 was a period of shut down making it difficult to determine the need for open orders and there was a substantial amount of unemployment claims in dispute. In some cases, the estimated amount encumbered varies from the actual invoice (e.g., utility bill; water bill, pending special education settlements) and we do not need to spend the entire encumbrance. Once the audit is final for 2020-21, the funds will be returned.*

<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.

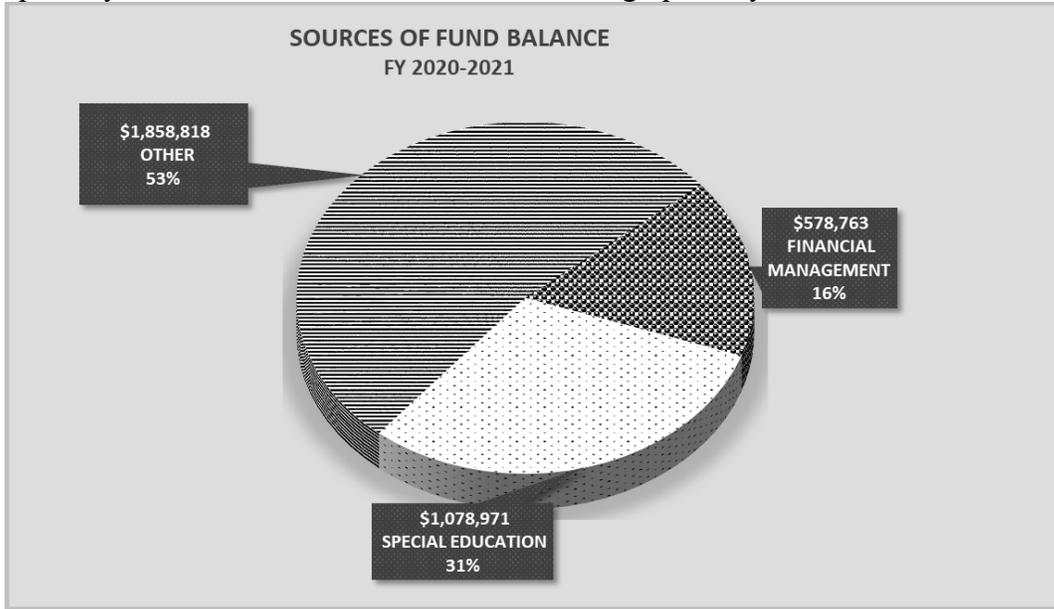
**\$192,377 SUPPLIES:** Instructional supplies and maintenance supplies were underbudget. The teaching staff adjusted purchases for remote and hybrid learning. \$96,980 was reimbursed through grants.

**\$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.

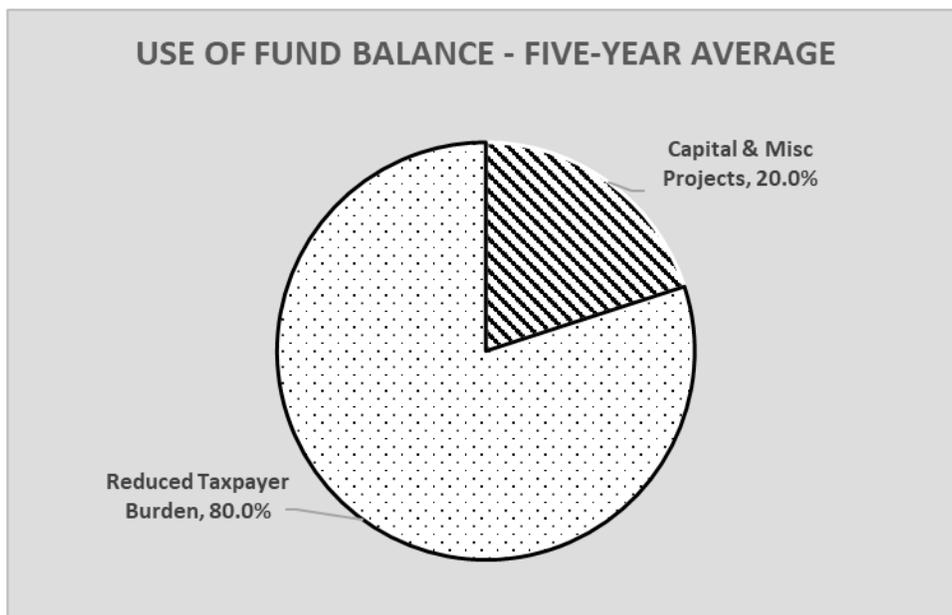
The primary sources of the fund balance are shown graphically below:



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 \$83,471 was subtracted from the Towns' March 2023 allocation payment. We encumber funds for goods and services received by June 30<sup>th</sup> but not yet billed. In some cases, the estimated amount encumbered varies from the actual invoice (e.g., utility bill; water bill, pending special education settlements) and we do not need to spend the entire encumbrance.*

The audited fund balance for 2021-2022 is \$628,463 plus \$929,175 designated for capital non-recurring projects. The 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 than 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 a 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 than using an 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.

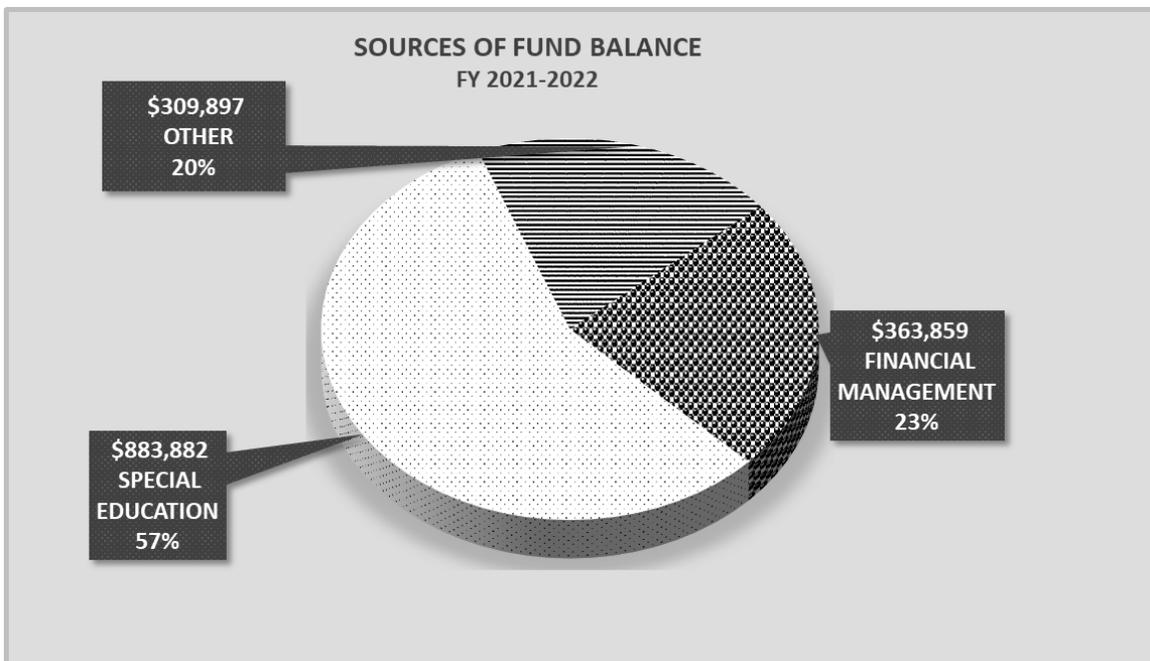
**\$18,429 PURCHASED SERVICES (OTHER):** Other purchased services accounts were under budget collectively by \$8,666 due to less printed materials and catered events. Data processing was under budget by \$9,763 as the administration consolidated onboarding software options at a reduced cost.

**\$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..

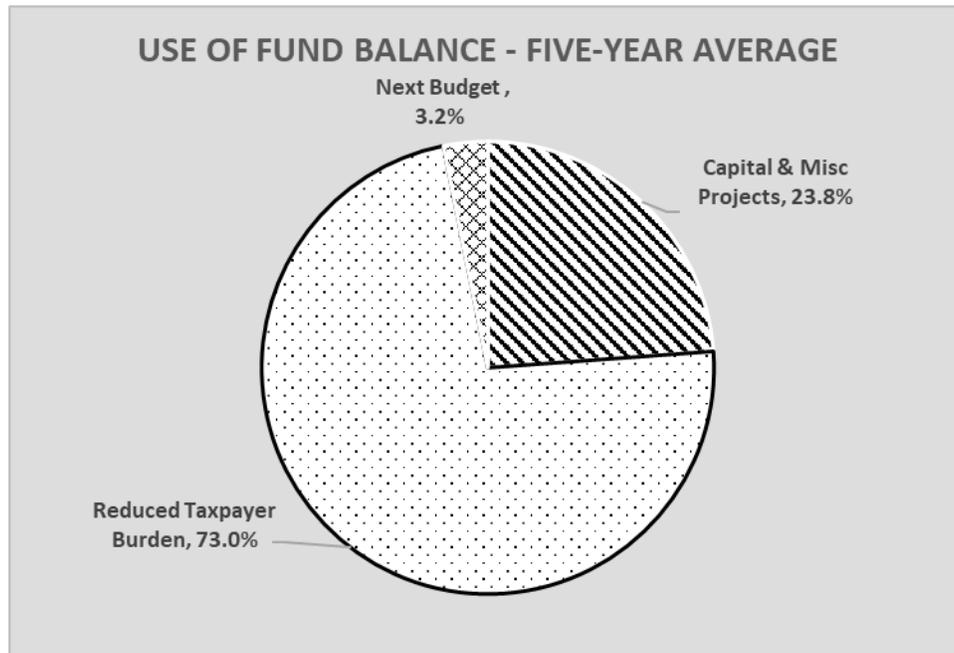
The primary sources of the fund balance are shown graphically below:



The use of the fund balance is proposed as follows:

1. **\$929,175 - 1.80%** designated to Capital Nonrecurring Reserve
2. **\$628,463** – Reduced Towns’ allocation payments in March 2023.

The uses of the fund balance are shown graphically below:



**Carry Over Funds:**

The Board of Education approved 1.80% or \$929,175 of the FY22 surplus transferred to the Capital Nonrecurring Reserve, the audited balance is \$628,463. The FY21 unspent encumbrances and unspent funds from FY22 will be subtracted from the Towns’ March 2023 allocation payments.

**Amity Regional School District No. 5 - Budget Transfers 2022-2023**

<b>MONTH/YR</b>	<b>JNL#</b>	<b>ACCOUNT NUMBER &amp; DESCRIPTION</b>	<b>AMOUNT</b>	<b>DESCRIPTION</b>
<b>JUL</b>				
NO FUND- 1 ENTRIES				
<b>AUGUST</b>				
NO FUND- 1 ENTRIES				
<b>SEPTEMBER</b>				
Sep-22	17	03-14-2600-5613 MAINTENANCE/CUSTODIAL SUPPLIES	\$ (2,850.00)	guards supplies
Sep-22	17	05-14-2600-5730 EQUIPMENT - NEW	\$ 2,850.00	guards supplies
Sep-22	43	05-14-2660-5730 EQUIPMENT - NEW	\$ 2,850.00	Corr. JE 2023-03-17 Guard Supp
Sep-22	43	05-14-2600-5730 EQUIPMENT - NEW	\$ (2,850.00)	Corr. JE 2023-03-17 Guard Supp
Sep-22	102	02-13-2220-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (142.00)	CLC Membership Dues
Sep-22	102	02-13-2220-5810 DUES & FEES	\$ 142.00	CLC Membership Dues
Sep-22	104	01-13-2220-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (142.00)	CLC Membership Dues
Sep-22	104	01-13-2220-5810 DUES & FEES	\$ 142.00	CLC Membership Dues
Sep-22	120	02-11-1013-5611 INSTRUCTIONAL SUPPLIES	\$ (1,580.00)	LICENSE FOR GIZMOS SCIENCE DEP
Sep-22	120	02-14-2350-5695 TECHNOLOGY SUPPLIES	\$ 1,580.00	LICENSE FOR GIZMOS SCIENCE DEP
Sep-22	134	01-11-1010-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (500.00)	Concert Supplies
Sep-22	134	01-11-1010-5611 INSTRUCTIONAL SUPPLIES	\$ 500.00	Concert Supplies
Sep-22	150	02-13-2220-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (600.00)	books for kindles/read wrkshop
Sep-22	150	02-13-2220-5642 LIBRARY BOOKS & PERIODICALS	\$ 600.00	books for kindles/read wrkshop
Sep-22	157	03-11-1017-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (179.00)	for standing desk
Sep-22	157	03-11-1017-5611 INSTRUCTIONAL SUPPLIES	\$ 179.00	for standing desk
<b>OCTOBER</b>				
Oct-22	22	01-11-1013-5611 INSTRUCTIONAL SUPPLIES	\$ (1,580.00)	Renew Gizmos Science License
Oct-22	22	01-14-2350-5695 TECHNOLOGY SUPPLIES	\$ 1,580.00	Renew Gizmos Science License
Oct-22	39	02-11-1009-5611 INSTRUCTIONAL SUPPLIES	\$ (350.00)	DELTAMATH PLUS LICENSE
Oct-22	39	02-14-2350-5695 TECHNOLOGY SUPPLIES	\$ 350.00	DELTAMATH PLUS LICENSE
Oct-22	41	01-11-1009-5611 INSTRUCTIONAL SUPPLIES	\$ (2.00)	ITEM PRICE INCREASE
Oct-22	41	01-11-1009-5810 DUES & FEES	\$ 2.00	ITEM PRICE INCREASE
Oct-22	69	03-14-2600-5420 REPAIRS,MAINTENANCE & CLEANING	\$ (345.00)	EAGLE LEASING TRAILER INCREASE
Oct-22	69	03-14-2600-5440 RENTALS-LAND,BLDG,EQUIPMENT	\$ 345.00	EAGLE LEASING TRAILER INCREASE
Oct-22	73	01-11-1005-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (610.00)	Purchase English Dept Supplies
Oct-22	73	01-11-1005-5611 INSTRUCTIONAL SUPPLIES	\$ 610.00	Purchase English Dept Supplies
Oct-22	74	01-11-1008-5611 INSTRUCTIONAL SUPPLIES	\$ (50.00)	CTE Conference Membership
Oct-22	74	01-11-1008-5810 DUES & FEES	\$ 50.00	CTE Conference Membership
Oct-22	80	04-12-6110-5510 PUPIL TRANSPORTATION	\$ (907.00)	Transportation for Platt Tech
Oct-22	80	05-14-2700-5512 VO-AG/VO-TECH REG ED	\$ 907.00	Transportation for Platt Tech
Oct-22	130	02-11-1008-5420 REPAIRS,MAINTENANCE & CLEANING	\$ (50.00)	CONFERENCE
Oct-22	130	02-11-1008-5810 DUES & FEES	\$ 50.00	CONFERENCE
Oct-22	135	04-12-2151-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (900.00)	REIMBURSEMENT ZOOM
Oct-22	135	04-13-2190-5690 OTHER SUPPLIES	\$ 900.00	REIMBURSEMENT ZOOM
Oct-22	157	05-13-2212-5810 DUES & FEES	\$ (21.00)	11/8/22 Prof Dev Day Lunch
Oct-22	157	05-13-2212-5590 OTHER PURCHASED SERVICES	\$ 21.00	11/8/22 Prof Dev Day Lunch
Oct-22	184	04-12-6130-5510 PUPIL TRANSPORTATION	\$ (1,812.00)	TUITION FOR ECA
Oct-22	184	04-12-6117-5560 TUITION EXPENSE	\$ 1,812.00	TUITION FOR ECA
<b>NOVEMBER</b>				
Nov-22	73	02-13-2400-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (100.00)	FOR REPAIRS TO LAMINATOR
Nov-22	73	02-13-2400-5420 REPAIRS,MAINTENANCE & CLEANING	\$ 100.00	FOR REPAIRS TO LAMINATOR
Nov-22	111	03-13-2130-5690 OTHER SUPPLIES	\$ (567.00)	TRANSFER FOR PSNI
Nov-22	111	03-13-2130-5695 TECHNOLOGY SUPPLIES	\$ 567.00	TRANSFER FOR PSNI
<b>DECEMBER</b>				
Dec-22	56	02-13-2220-5690 OTHER SUPPLIES	\$ (800.00)	Books for media center
Dec-22	56	02-13-2220-5642 LIBRARY BOOKS & PERIODICALS	\$ 800.00	Books for media center
Dec-22	60	01-11-1008-5611 INSTRUCTIONAL SUPPLIES	\$ (720.00)	LIFE ARTS SOFTWARE PURCHASE
Dec-22	60	01-14-2350-5695 TECHNOLOGY SUPPLIES	\$ 720.00	LIFE ARTS SOFTWARE PURCHASE
Dec-22	81	05-14-2350-5695 TECHNOLOGY SUPPLIES	\$ (1,233.00)	PROMETHEAN BOARD SHIPPING
Dec-22	81	05-14-2350-5732 EQUIPMENT-TECHNOLOGY-NEW	\$ 1,233.00	PROMETHEAN BOARD SHIPPING
Dec-22	84	05-14-2350-5695 TECHNOLOGY SUPPLIES	\$ (1,460.00)	COVER S/H
Dec-22	84	05-14-2350-5732 EQUIPMENT-TECHNOLOGY-NEW	\$ 1,460.00	COVER S/H
Dec-22	111	05-14-2350-5695 TECHNOLOGY SUPPLIES	\$ (5.00)	cover s/h
Dec-22	111	05-14-2350-5732 EQUIPMENT-TECHNOLOGY-NEW	\$ 5.00	cover s/h
Dec-22	113	05-13-2213-5111 CERTIFIED SALARIES	\$ (1,000.00)	PD Supplies

**Amity Regional School District No. 5 - Budget Transfers 2022-2023**

<b>MONTH/YR</b>	<b>JNL#</b>	<b>ACCOUNT NUMBER &amp; DESCRIPTION</b>	<b>AMOUNT</b>	<b>DESCRIPTION</b>
Dec-23	113	05-13-2213-5590 OTHER PURCHASED SERVICES	\$ 1,000.00	PD Supplies
<b>JANURARY</b>				
Jan-23	2	02-13-2220-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (155.00)	Amer. Library Assoc. Dues
Jan-23	2	02-13-2220-5810 DUES & FEES	\$ 155.00	Amer. Library Assoc. Dues
Jan-23	51	01-13-2220-5611 INSTRUCTIONAL SUPPLIES	\$ (327.00)	SS Music Assembly, Jan. 20
Jan-23	51	01-13-2220-5330 OTHER PROFESSIONAL & TECH SRVC	\$ 327.00	SS Music Assembly, Jan. 20
Jan-23	69	01-11-1014-5611 INSTRUCTIONAL SUPPLIES	\$ (975.00)	SOCIAL STUDIES PRESENTERS
Jan-23	69	01-11-1014-5330 OTHER PROFESSIONAL & TECH SRVC	\$ 975.00	SOCIAL STUDIES PRESENTERS
Jan-23	83	04-12-6130-5560 TUITION EXPENSE	\$ (2,900.00)	Outside Prvdrs for IEP Servcs
Jan-23	83	04-13-2130-5330 OTHER PROFESSIONAL & TECH SRVC	\$ 2,900.00	Outside Prvdrs for IEP Servcs
Jan-23	347	04-12-1207-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (750.00)	Supplies for Classroom Sp.Prep
Jan-23	347	04-12-1207-5611 INSTRUCTIONAL SUPPLIES	\$ 750.00	Supplies for Classroom Sp.Prep
Jan-23	348	04-12-2151-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (2,500.00)	Conference Reimbursement
Jan-23	348	04-13-2190-5581 TRAVEL - CONFERENCES	\$ 2,500.00	Conference Reimbursement
Jan-23	393	03-11-1006-5641 TEXTBOOKS	\$ (1,000.00)	TRANSER FOR SUPPLIES
Jan-23	393	03-11-1006-5690 OTHER SUPPLIES	\$ 1,000.00	TRANSER FOR SUPPLIES
<b>FEBRUARY</b>				
Feb-23	8	02-13-2400-5690 OTHER SUPPLIES	\$ (25.00)	REPAIR OF LOCKDOWN SYSTEM
Feb-23	8	02-13-2400-5420 REPAIRS,MAINTENANCE & CLEANING	\$ 25.00	REPAIR OF LOCKDOWN SYSTEM
Feb-23	37	03-11-1001-5581 TRAVEL - CONFERENCES	\$ (500.00)	cameras needed for classes
Feb-23	37	03-11-1001-5730 EQUIPMENT - NEW	\$ 500.00	cameras needed for classes
Feb-23	58	02-14-2600-5420 REPAIRS,MAINTENANCE & CLEANING	\$ (969.00)	2 additional window covers
Feb-23	58	05-14-2660-5690 OTHER SUPPLIES	\$ 969.00	2 additional window covers
Feb-23	93	03-11-1008-5810 DUES & FEES	\$ (510.00)	transf funds for TSA activitie
Feb-23	93	03-11-1008-5611 INSTRUCTIONAL SUPPLIES	\$ 510.00	transf funds for TSA activitie
Feb-23	146	02-11-1014-5611 INSTRUCTIONAL SUPPLIES	\$ (40.00)	SPEAKER FOR SOCIAL STUDIES
Feb-23	146	02-11-1014-5330 OTHER PROFESSIONAL & TECH SRVC	\$ 40.00	SPEAKER FOR SOCIAL STUDIES
Feb-23	173	03-11-1006-5611 INSTRUCTIONAL SUPPLIES	\$ (63.00)	Teacher chairs
Feb-23	173	03-11-1006-5690 OTHER SUPPLIES	\$ 63.00	Teacher chairs
Feb-23	177	02-13-2220-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (103.00)	Replace color poster printer
Feb-23	177	02-13-2220-5611 INSTRUCTIONAL SUPPLIES	\$ (24.00)	Replace color poster printer
Feb-23	177	02-13-2220-5690 OTHER SUPPLIES	\$ (469.00)	Replace color poster printer
Feb-23	177	02-13-2220-5642 LIBRARY BOOKS & PERIODICALS	\$ (404.00)	Replace color poster printer
Feb-23	177	02-13-2220-5731 EQUIPMENT - REPLACEMENT	\$ 1,000.00	Replace color poster printer
Feb-23	186	03-13-2220-5690 OTHER SUPPLIES	\$ (588.00)	Transfer to purchase books
Feb-23	186	03-13-2220-5642 LIBRARY BOOKS & PERIODICALS	\$ 588.00	Transfer to purchase books
Feb-23	207	02-11-1011-5611 INSTRUCTIONAL SUPPLIES	\$ (500.00)	REPAIRS IN WEIGHT ROOM
Feb-23	207	02-11-1011-5420 REPAIRS,MAINTENANCE & CLEANING	\$ 500.00	REPAIRS IN WEIGHT ROOM

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



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

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

To: Jennifer Byars, Ed. D., Superintendent of Schools  
From: Theresa Lumas, Director of Finance and Administration  
Re: Budget Transfers over \$3,000  
Date: February 28, 2022

**Textbooks:**

**1. World Language and Science**

Textbooks were removed from the 2023-2024 budget in order to the lower the increase. There are funds on textbooks lines in the current budget available to support these purchases now and give the teachers time to plan lessons with the new texts. Changes were made to the current year textbook plan during the year as some books came in less and some selections were revisited and postponed until next year. Spanish, French and Science texts were removed from the 2023-2024 budget with the intentions of ordering them now.

**Motions:**

**For the Amity Finance Committee:**

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

**For the Amity Board of Education:**

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

***...the following budget transfer in textbook accounts at the high school***

<b>ACCOUNT NUMBER</b>	<b>ACCOUNT NAME</b>	<b>FROM</b>	<b>TO</b>
03-11-1009-5641	Textbooks-Math	\$16,100	
03-11-1010-5641	Textbooks-Music	\$ 1,293	
03-13-2400-5641	Textbooks-Principal	\$ 3,789	
03-11-1006-5641	Textbooks- World Language		\$14,017
03-11-1013-5641	Textbooks- Science		\$ 7,165

**ARHS Student Competition:**

## **2. Academic Decathlon Team**

Our Academic Decathlon Team just won the state championship, which qualifies them for the national championship later this spring. This is an exciting achievement, but nothing was budgeted for this travel. Mr. Hauser, ARHS Principal estimates the cost to be about \$7,000-8,000. The transfer request is to use funds budgeted for interns. We were not able to contract with any interns this year.

### **Motions:**

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

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

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

*Move to approve...*

*...the following budget transfer in Academic Decathlon National Championship entry and travel at the high school*

<b>ACCOUNT NUMBER</b>	<b>ACCOUNT NAME</b>	<b>FROM</b>	<b>TO</b>
03-13-2400-5330	Professional Tech Services	\$ 8,000	
03-13-2400-5590	Other Purchased Services		\$ 8,000

### **Special Education:**

#### **3. Contracted services:**

Services from private contractors are needed to cover vacancies of professional staff and provide high-quality literacy services. Services must be provided to students with identified needs on their IEP.

### **Motions:**

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

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

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

*Move to approve –*

*...the following budget transfer for contracted services due to vacant positions:*

<b>ACCOUNT NUMBER</b>	<b>ACCOUNT NAME</b>	<b>FROM</b>	<b>TO</b>
03-12-2150-5111	Certified Salaries	\$ 3,000	
04-12-6110-5560	Tuition Private Out	\$45,000	

04-12-6130-5560	Tuition Private Out	\$ 2,080	
04-12-1203-5330	Professional Technical Svcs	\$10,400	
04-12-2151-5330	Professional Technical Svcs	\$20,000	
04-13-2130-5330	Professional Technical Svcs		\$50,080
04-12-1208-5330	Professional Technical Svcs		\$30,400

Q3 FY23 Grant Report

FUND	ORG	OBJ	ACCOUNT DESCRIPTION	ORIGINAL APPROP	TRANFRS/ADJS MTS	REVISED BUDGET	LTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	% USED
6	00008956	100	SALARIES	41,949	0	41,949	41,949.48	0.00	0	100.00
6	00008956	300	PROFESSIONAL SERVICES	9,193	0	9,193	9,192.92	0.00	0	100.00
6	00008956	500	OTHER PURCHASED SERVICES	3,898	0	3,898	3,897.60	0.00	0	100.00
	00008956		Total 00008956 ESSER Funds	55,040	0	55,040	55,040.00	0.00	0	100.00
6	00008966	100	SALARIES	95,737	6,615	102,352	85,845.11	16,419.24	88	99.90
6	00008966	300	PROFESSIONAL SERVICES	28,358	0	28,358	28,358.00	0.00	0	100.00
6	00008966	500	OTHER PURCHASED SERVICES	40,000	-34,973	5,027	5,026.50	0.00	1	100.00
6	00008966	600	SUPPLIES	21,928	0	21,928	21,928.00	0.00	0	100.00
6	00008966	700	PROPERTY	83,750	0	83,750	83,750.00	0.00	0	100.00
	00008966		Total 00008966 ESSER II 2021-2023	269,773	-28,358	241,415	224,907.61	16,419.24	88	100.00
6	00008967	100	SALARIES	2,607	0	2,607	2,607.00	0.00	0	100.00
	00008967		Total 00008967 ESSER II STATE SET-A	2,607	0	2,607	2,607.00	0.00	0	100.00
6	00008969	100	SALARIES	276,662	0	276,662	152,896.71	40,233.71	83,532	69.80
6	00008969	300	PROFESSIONAL SERVICES	36,155	35,000	71,155	52,960.00	11,535.00	6,660	90.60
6	00008969	500	OTHER PURCHASED SERVICES	50,748	0	50,748	28,799.15	0.00	21,949	56.70
6	00008969	600	SUPPLIES	35,000	-35,000	0	0.00	0.00	0	0.00
6	00008969	700	PROPERTY	144,000	0	144,000	144,000.00	0.00	0	100.00
	00008969		Total 00008969 ARP ESSER 2020-2024	542,565	0	542,565	378,655.86	51,768.71	112,140	79.30
6	00008970	5899	UNDESIGNATED OBJECTS	10,732	0	10,732	10,396.93	0.00	335	96.90
	00008970		Total 00008970 CABLE ADVISORY COUNC	10,732	0	10,732	10,396.93	0.00	335	96.90
6	00008971	100	SALARIES	52,800	15,000	67,800	67,800.00	0.00	0	100.00
6	00008971	200	MEDICARE	4,040	0	4,040	4,040.00	0.00	0	100.00
6	00008971	300	PROFESSIONAL SERVICES	15,000	-15,000	0	0.00	0.00	0	0.00
6	00008971	600	SUPPLIES	9,857	0	9,857	3,266.22	0.00	6,591	33.10
	00008971		Total 00008971 TITLE I 2021-2023	81,697	0	81,697	75,106.22	0.00	6,591	91.90
6	00008972	100	SALARIES	17,364	0	17,364	828.35	0.00	16,536	4.80
6	00008972	300	PROFESSIONAL SERVICES	9,750	0	9,750	5,084.20	4,665.79	0	100.00
6	00008972	500	OTHER PURCHASED SERVICES	4,460	0	4,460	1,009.70	3,450.30	0	100.00
6	00008972	600	SUPPLIES	1,828	0	1,828	86.50	0.40	1,741	4.80
	00008972		Total 00008972 TITLE II 2021-2023	33,402	0	33,402	7,008.75	8,116.49	18,277	45.30
6	00008973	300	PROFESSIONAL SERVICES	1,000	0	1,000	695.00	305.00	0	100.00
6	00008973	600	SUPPLIES	1,332	0	1,332	1,387.01	0.00	-55	104.10
	00008973		Total 00008973 TITLE III 2021-2023	2,332	0	2,332	2,082.01	305.00	-55	102.40
6	00008974	100	SALARIES	10,000	0	10,000	9,151.72	0.00	848	91.50
	00008974		Total 00008974 TITLE IV FY 2021-202	10,000	0	10,000	9,151.72	0.00	848	91.50
6	00008975	100	SALARIES	129,642	0	129,642	129,642.02	0.00	0	100.00
6	00008975	112	SALARIES NON-CERTIFIED	244,849	0	244,849	244,849.00	0.00	0	100.00
6	00008975	200	MEDICARE	38,042	0	38,042	38,042.00	0.00	0	100.00

Q3 FY23 Grant Report

FUND	ORG	OBJ	ACCOUNT DESCRIPTION	ORIGINAL APPROP	TRANFRS/ADJS MTS	REVISED BUDGET	LTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	% USED
6	00008975	321	TUTORS	9,000	-5,000	4,000	0.00	0.00	4,000	0.00
6	00008975	324	FIELD TRIPS	12,000	0	12,000	4,256.20	0.00	7,744	35.50
6	00008975	325	PARENT ACTIVITIES	1,000	0	1,000	153.78	0.00	846	15.40
6	00008975	440	RENTALS (LAND BLDGS EQPT)	5,000	-2,500	2,500	0.00	0.00	2,500	0.00
6	00008975	600	SUPPLIES	4,336	0	4,336	1,120.77	0.00	3,215	25.80
6	00008975	600NP	SUPPLIES NON PUBLIC	1,521	0	1,521	0.00	0.00	1,521	0.00
6	00008975	730	EQUIPMENT-NEW	500	0	500	0.00	0.00	500	0.00
6	00008975	734	Technology related hardware	1,250	7,500	8,750	8,750.00	0.00	0	100.00
	00008975		Total 00008975 IDEA FY 2021-2023	447,140	0	447,140	426,813.77	0.00	20,326	95.50
6	00008976	320	PROFESSIONAL EDUCATION SERVICE	1,870	-1,180	690	690.00	0.00	0	100.00
6	00008976	330	OTHER PROF & TECH SERVCIS	2,380	-305	2,075	2,075.00	0.00	0	100.00
6	00008976	510	TRANSPORTATION PUPIL	640	550	1,190	868.39	0.00	322	73.00
6	00008976	580	TRAVEL-STAFF	2,370	-636	1,734	1,734.51	0.00	-1	100.00
6	00008976	600	SUPPLIES	21,927	1,431	23,358	23,679.10	0.00	-321	101.40
6	00008976	700	PROPERTY	15,498	-500	14,998	14,998.00	0.00	0	100.00
	00008976		Total 00008976 CARL PERKINS FY22	44,685	-640	44,045	44,045.00	0.00	0	100.00
6	00008977	111B	TEACHERS' SALARIES	8,750	0	8,750	5,750.00	0.00	3,000	65.70
6	00008977	111NP	TEACHERS NON-PUBLIC	643	0	643	0.00	0.00	643	0.00
6	00008977	200	MEDICARE	31,822	0	31,822	31,821.89	0.00	0	100.00
6	00008977	322	INSTR PROGRAM IMPROVEMENT	7,357	0	7,357	0.00	0.00	7,357	0.00
6	00008977	600	SUPPLIES	8,238	0	8,238	8,238.14	0.00	0	100.00
6	00008977	734	Technology related hardware	37,821	0	37,821	35,477.66	0.00	2,343	93.80
	00008977		Total 00008977 ARP IDEA 21-23	94,631	0	94,631	81,287.69	0.00	13,343	85.90
6	00008978	111B	TEACHERS' SALARIES	29,000	-24,931	4,069	4,069.12	0.00	0	100.00
6	00008978	200	MEDICARE	11,000	-10,000	1,000	1,000.00	0.00	0	100.00
6	00008978	321	TUTORS	34,931	0	34,931	34,930.88	0.00	0	100.00
	00008978		Total 00008978 SPED RECOVERY ACTIVI	74,931	-34,931	40,000	40,000.00	0.00	0	100.00
6	00008979	111B	TEACHERS' SALARIES	21,600	0	21,600	0.00	0.00	21,600	0.00
6	00008979	322	INSTR PROGRAM IMPROVEMENT	3,400	0	3,400	0.00	0.00	3,400	0.00
	00008979		Total 00008979 SPECIAL POPULATIONS	25,000	0	25,000	0.00	0.00	25,000	0.00
6	00008980	321	TUTORS	13,000	0	13,000	11,000.00	0.00	2,000	84.60
	00008980		Total 00008980 DYSLEXIA RECOVERY	13,000	0	13,000	11,000.00	0.00	2,000	84.60
6	00008981	5899	UNDESIGNATED OBJECTS	14,999	61,444	76,443	74,559.16	1,883.84	0	100.00
	00008981		Total 00008981 OPEN CHOICE FY22	14,999	61,444	76,443	74,559.16	1,883.84	0	100.00
6	00008982	5732	EQUIPMENT-TECHNOLOGY-NEW	17,600	0	17,600	17,600.00	0.00	0	100.00
	00008982		Total 00008982 EMERGENCY CONNECTIVI	17,600	0	17,600	17,600.00	0.00	0	100.00
6	00008983	100	SALARIES	1,487	0	1,487	1,487.00	0.00	0	100.00
	00008983		Total 00008983 TEAM MENTOR FY22	1,487	0	1,487	1,487.00	0.00	0	100.00

Q3 FY23 Grant Report

FUND	ORG	OBJ	ACCOUNT DESCRIPTION	ORIGINAL APPROP	TRANFRS/ADJS MTS	REVISED BUDGET	LTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	% USED
6	00008984	5590	OTHER PURCHASED SERVICES	3,316	0	3,316	240.40	0.00	3,076	7.20
	00008984		Total 00008984 ARP ESSER HCY	3,316	0	3,316	240.40	0.00	3,076	7.20
6	00008985	5330	OTHER PROFESSIONAL & TECH SRVC	5,000	0	5,000	1,552.77	0.00	3,447	31.10
6	00008985	5715	IMPROVEMENTS TO BUILDINGS	150,864	-21,787	129,077	69,004.84	0.00	60,072	53.50
6	00008985	5730	EQUIPMENT - NEW	10,000	25,270	35,270	34,501.30	1,354.32	-586	101.70
6	00008985	5731	EQUIPMENT - REPLACEMENT	10,000	0	10,000	0.00	0.00	10,000	0.00
	00008985		Total 00008985 FEMA COVID-19	175,864	3,483	179,346	105,058.91	1,354.32	72,933	59.30
6	00008986	700	PROPERTY	24,300	0	24,300	24,299.91	0.00	0	100.00
	00008986		Total 00008986 PEGPETIA GRANT FY22	24,300	0	24,300	24,299.91	0.00	0	100.00
6	00008987	600	SUPPLIES	916	444	1,360	1,335.81	0.00	24	98.20
6	00008987	700	PROPERTY	45,513	-444	45,069	45,060.24	0.00	9	100.00
	00008987		Total 00008987 PERKINS SUPPLEMENTAL	46,429	0	46,429	46,396.05	0.00	33	99.90
6	00008988	5899	UNDESIGNATED OBJECTS	13,199	0	13,199	11,460.04	0.00	1,739	86.80
	00008988		Total 00008988 CAC FY23	13,199	0	13,199	11,460.04	0.00	1,739	86.80
6	00008989	111B	TEACHERS' SALARIES	3,000	0	3,000	3,000.00	0.00	0	100.00
6	00008989	300	PROFESSIONAL SERVICES	7,000	0	7,000	3,500.00	3,500.00	0	100.00
	00008989		Total 00008989 SPED STIPEND \$10K	10,000	0	10,000	6,500.00	3,500.00	0	100.00
6	00008990	100	SALARIES	55,593	0	55,593	20,387.53	0.00	35,205	36.70
6	00008990	200	MEDICARE	20,347	0	20,347	0.00	0.00	20,347	0.00
6	00008990	600	SUPPLIES	1,000	0	1,000	0.00	0.00	1,000	0.00
	00008990		Total 00008990 TITLE I 2022-2024	76,940	0	76,940	20,387.53	0.00	56,552	26.50
6	00008991	100	SALARIES	16,290	0	16,290	0.00	0.00	16,290	0.00
6	00008991	300	PROFESSIONAL SERVICES	10,809	0	10,809	0.00	0.00	10,809	0.00
6	00008991	500	OTHER PURCHASED SERVICES	1,640	0	1,640	0.00	0.00	1,640	0.00
	00008991		Total 00008991 TITLE II 2022-2024	28,739	0	28,739	0.00	0.00	28,739	0.00
6	00008993	300	PROFESSIONAL SERVICES	1,000	0	1,000	0.00	0.00	1,000	0.00
6	00008993	600	SUPPLIES	1,262	0	1,262	0.00	0.00	1,262	0.00
	00008993		Total 00008993 TITLE III 2022-2024	2,262	0	2,262	0.00	0.00	2,262	0.00
6	00008994	100	SALARIES	72,000	0	72,000	21,328.45	31,665.12	19,006	73.60
6	00008994	111NP	TEACHERS NON-PUBLIC	500	0	500	0.00	0.00	500	0.00
6	00008994	112	SALARIES NON-CERTIFIED	302,491	0	302,491	94,407.63	110,767.92	97,315	67.80
6	00008994	200	MEDICARE	37,145	0	37,145	0.00	0.00	37,145	0.00
6	00008994	321	TUTORS	6,500	0	6,500	0.00	0.00	6,500	0.00
6	00008994	322	INSTR PROGRAM IMPROVEMENT	2,500	0	2,500	0.00	0.00	2,500	0.00
6	00008994	324	FIELD TRIPS	12,000	0	12,000	0.00	0.00	12,000	0.00
6	00008994	325	PARENT ACTIVITIES	500	0	500	0.00	0.00	500	0.00
6	00008994	440	RENTALS (LAND BLDGS EQPT)	4,500	0	4,500	0.00	0.00	4,500	0.00
6	00008994	600	SUPPLIES	4,867	0	4,867	0.00	0.00	4,867	0.00

Q3 FY23 Grant Report

FUND	ORG	OBJ	ACCOUNT DESCRIPTION	ORIGINAL APPROP	TRANFRS/ADJS MTS	REVISED BUDGET	LTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	% USED
6	00008994	600NP	SUPPLIES NON PUBLIC	2,490	0	2,490	0.00	0.00	2,490	0.00
6	00008994	734	Technology related hardware	750	0	750	0.00	0.00	750	0.00
	00008994		Total 00008994 IDEA FY 2022-2024	446,243	0	446,243	115,736.08	142,433.04	188,074	57.90
6	00008995	320	PROFESSIONAL EDUCATION SERVICE	990	0	990	990.00	0.00	0	100.00
6	00008995	330	OTHER PROF & TECH SERVICES	5,360	0	5,360	5,360.00	0.00	0	100.00
6	00008995	510	TRANSPORTATION PUPIL	2,500	0	2,500	0.00	776.88	1,723	31.10
6	00008995	600	SUPPLIES	16,249	275	16,524	16,268.79	0.00	255	98.50
6	00008995	700	PROPERTY	17,231	-275	16,956	16,955.55	0.00	0	100.00
	00008995		Total 00008995 CARL PERKINS FY23	42,330	0	42,330	39,574.34	776.88	1,979	95.30
6	00008996	5899	UNDESIGNATED OBJECTS	18,047	0	18,047	0.00	0.00	18,047	0.00
	00008996		Total 00008996 OPEN CHOICE FY23	18,047	0	18,047	0.00	0.00	18,047	0.00
6	00009002	600	SUPPLIES	2,500	7,500	10,000	5,290.21	0.00	4,710	52.90
	00009002		Total 00009002 Science Research Awa	2,500	7,500	10,000	5,290.21	0.00	4,710	52.90
6	00009003	5899	UNDESIGNATED OBJECTS	1,421	27,612	29,033	19,814.74	0.00	9,218	68.20
	00009003		Total 00009003 MEDICAID GRANT	1,421	27,612	29,033	19,814.74	0.00	9,218	68.20
6	00009004	5899	UNDESIGNATED OBJECTS	500	0	500	130.00	0.00	370	26.00
	00009004		Total 00009004 PRESCRIPTION DRUG SA	500	0	500	130.00	0.00	370	26.00
6	00009005	5899	UNDESIGNATED OBJECTS	2,400	26,525	28,925	12,423.52	0.00	16,501	43.00
	00009005		Total 00009005 CBITS SUSTAINABILITY	2,400	26,525	28,925	12,423.52	0.00	16,501	43.00
6			Total 6 State & Federal grants	2,636,111	62,634	2,698,746	1,869,060.45	226,557.52	603,128	77.70

Q3 FY23 CNR Report

FUND	ORG	OBJ	ACCOUNT DESCRIPTION	ORIGINAL	TRANFRS/ADJ	REVISED	YTD EXPENDED	ENCUMBRANCES	AVAILABLE	% USED
				APPROP	SMTS	BUDGET			BUDGET	
17	00150030	5420	REPAIRS,MAINTENANCE & CLEANING	32,000	3,663	35,663	35,663.10	0.00	0	100.00
	00150030		Total 00150030 Security and Safety	32,000	3,663	35,663	35,663.10	0.00	0	100.00
17	00150047	5720	IMPROVEMENTS TO SITES	3,067,849	293,257	3,361,106	3,352,862.98	0.00	8,243	99.80
	00150047		Total 00150047 Athletics Facility P	3,067,849	293,257	3,361,106	3,352,862.98	0.00	8,243	99.80
17	00150048	5715	IMPROVEMENTS TO BUILDINGS	1,830,630	235,817	2,066,447	1,993,919.17	63,600.00	8,928	99.60
	00150048		Total 00150048 HVAC AHS 2020 BOND	1,830,630	235,817	2,066,447	1,993,919.17	63,600.00	8,928	99.60
17	00150049	5715	IMPROVEMENTS TO BUILDINGS	140,000	100,910	240,910	136,822.00	104,084.00	4	100.00
	00150049		Total 00150049 CHILLERS REFURBISH A	140,000	100,910	240,910	136,822.00	104,084.00	4	100.00
17	00150050	5715	IMPROVEMENTS TO BUILDINGS	600,000	-46,640	553,360	532,032.66	0.00	21,327	96.15
	00150050		Total 00150050 PAVING AHS	600,000	-46,640	553,360	532,032.66	0.00	21,327	96.15
17	00150051	5330	OTHER PROFESSIONAL & TECH SRVC	108,018	-39,156	68,862	68,862.12	0.00	0	100.00
	00150051		Total 00150051 BOND CLOSING COSTS	108,018	-39,156	68,862	68,862.12	0.00	0	100.00
17	00150052	5715	IMPROVEMENTS TO BUILDINGS	245,000	-163,710	81,290	72,610.00	8,000.00	680	99.20
	00150052		Total 00150052 ACOUSTICAL IMPROVEME	245,000	-163,710	81,290	72,610.00	8,000.00	680	99.20
17	00150053	5715	IMPROVEMENTS TO BUILDINGS	587,453	-389,428	198,025	0.00	0.00	198,025	0.00
	00150053		Total 00150053 2020 Bond Contingenc	587,453	-389,428	198,025	0.00	0.00	198,025	0.00
17	00150054	5715	IMPROVEMENTS TO BUILDINGS	495,482	0	495,482	420,826.68	0.00	74,655	84.90
	00150054		Total 00150054 AHS ROOF REPLACEMENT	495,482	0	495,482	420,826.68	0.00	74,655	84.90
17	00150055	5715	IMPROVEMENTS TO BUILDINGS	110,000	392,764	502,764	93,883.37	408,880.36	0	100.00
	00150055		Total 00150055 LECTURE HALL RENOVAT	110,000	392,764	502,764	93,883.37	408,880.36	0	100.00
17	00150060	5420	REPAIRS,MAINTENANCE & CLEANING	100,000	0	100,000	16,556.00	0.00	83,444	16.60
	00150060		Total 00150060 LIGHTING PROJECT	100,000	0	100,000	16,556.00	0.00	83,444	16.60
17	00150061	5731	EQUIPMENT - REPLACEMENT	190,075	0	190,075	0.00	190,074.24	1	100.00
	00150061		Total 00150061 MUSIC INSTRUMENTS	190,075	0	190,075	0.00	190,074.24	1	100.00
17	00150062	5715	IMPROVEMENTS TO BUILDINGS	331,500	0	331,500	0.00	0.00	331,500	0.00
	00150062		Total 00150062 AMSB ROOF PROJECT	331,500	0	331,500	0.00	0.00	331,500	0.00
17	00150063	5715	IMPROVEMENTS TO BUILDINGS	382,000	0	382,000	0.00	0.00	382,000	0.00
	00150063		Total 00150063 AMSO ROOF PROJECT	382,000	0	382,000	0.00	0.00	382,000	0.00
17	00150099	5899	UNDESIGNATED OBJECTS	65,243	198,024	263,267	0.00	0.00	263,267	0.00
	00150099		Total 00150099 UNDESIGNATED	65,243	198,024	263,267	0.00	0.00	263,267	0.00
			Grand Total	8,285,250	585,501	8,870,751	6,724,038	774,639	1,372,075	84.53

## Instruction

### Selection of Library Media Center Materials and Resources

Library Media Center materials shall be selected relative to the needs, interests, and abilities of the students in the Amity Regional School District No. 5 (ARSD). The school library media specialists shall attempt to stimulate and guide reading and teach the effective use of the library.

To this end, the ARSD Board of Education (Board) affirms that it is the responsibility of its professional staff:

- To provide materials that will enrich and support the curriculum, taking into consideration the varied interests, abilities, learning styles, and maturity levels of the students served;
- To provide materials that will stimulate growth in factual knowledge, literary appreciation, aesthetic values, societal standards, and reading skills;
- To provide materials on various sides of controversial issues so that young citizens may have an opportunity to ~~develop under guidance the practice of critical analysis and to~~ make informed judgments in their daily lives;
- To provide materials representative of the diverse religious, ethnic, cultural, and social groups and individuals that contribute to our world community;
- To place principle above personal opinion and reason above prejudice in the selection of materials, based on their educational and/or socio-cultural value in order to assure a comprehensive collection for the school community.

The primary responsibility for the selection of library media center materials lies with library media specialists employed by the school system. Recommendation of resources may involve many people: principals, supervisors, teachers, students, parents, and community members. The responsibility for coordinating the selection of library media resources and making the recommendation for purchase rests with the professionally trained library media personnel.

The ARSD Board subscribes to the Library Bill of Rights (AASL). In evaluating a book or other instructional material, it shall be judged in its entirety and not on isolated pages or parts. Controversial matters shall not in themselves require automatic rejection of the material considered.

The Superintendent shall establish an administrative regulation setting forth the process for responding to complaints, if any, concerning school library media center materials.

In accordance with Section 10-221 of the Connecticut General Statutes, the final decision for controversial reading matter shall rest with the Board of Education. The Board may designate a committee of the board for the purpose of reviewing formal complaints. Such decision shall be made following careful examination and discussion of the book or reading material with school administration and any other parties the Board may wish to include. The Board of Education shall base its decision regarding the works in question on legitimate pedagogical interests.

(cf. 1312 - Public Complaints)

(cf. 3260 – Sale & Disposal of Books, Equipment & Supplies)

**Policy Approved: DATE**

AMITY REGIONAL SCHOOL DISTRICT NO. 5  
Woodbridge, Connecticut

**Instruction**

**Selection of Library Media Center Materials and Resources**

(cf. 4118.21 - Academic Freedom)  
(cf. 6144 – Controversial Issues)  
(c.f. 6163 – Instructional Resources for Students)  
(c.f. 9132.3 – Curriculum Committee)

Legal References: Connecticut General Statutes

10-220 Duties of boards of education.

10-221(s) Boards of education to prescribe rules, policies, and procedures.

10-228 Free textbooks, supplies, materials and equipment.

10-240 Control of schools.

10-241 Powers of school districts.

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

Office for Intellectual Freedom, American Library Association. (2016).  
*Selection and Reconsideration Policy Toolkit for Public, School, & Academic Libraries.*

## **Instruction**

### **Selection of Library Media Center Materials and Resources**

#### **I. Definitions**

**Library resources** will refer to any print, non-print, or digital material whose content is used for formal or informal teaching/learning purposes, or any such material provided by the libraries to be used by the school community in pursuit of personal growth and knowledge.

#### **II. Responsibility for Selection of Library Resources**

While selection of library resources arises from the recommendations and requests of many people (administrators, teachers, students, parents, community persons, resource personnel, etc.), the responsibility for selecting and acquiring library resources rests with the library media specialists.

#### **III. Criteria for Selection of Learning Resources**

A. The following criteria will be used as they apply:

1. Library resources shall support and be consistent with the general educational goals of the state and district and the aims and objectives of individual schools and specific courses. Key to those goals is promoting reading as a leisure activity to build students' ability to interpret text at increasing levels of complexity, and to contribute to their intellectual development.
2. Library resources shall be chosen to enrich and support the curriculum and to respond to the personal needs and interests of users.
3. Library resources shall be judged on their qualities in terms of their:
  - a. artistic quality and/or literary style
  - b. authenticity
  - c. educational significance
  - d. factual content
  - e. physical format
  - f. presentation
  - g. readability
  - h. social relevance
  - i. appeal to user groups
  - j. technical quality
4. Library resources shall include a range of formats and levels to appropriately address different subject areas, as well as students' range of ages and differences in emotional development, ability level, learning styles, and social development.

B. The selection of learning resources on controversial issues will be directed toward maintaining a balanced collection representing various views.

#### **IV. Procedures for Selection of Learning Resources**

A. In selecting library resources, school librarians will evaluate available resources to identify curricular and other student needs. Librarians may use a combination of personal

**Instruction****Selection of Library Media Center Materials and Resources**

recommendations, established collection practices in other libraries, and reputable, professionally-prepared aids to selection and other appropriate sources. Potential published sources include, but are not limited to the following:

1. Children's Catalog
  2. Middle and Junior High Core Collection
  3. Senior High Core Collection
  4. Nonbook Materials Core Collection
  5. AASA Science Books and Films OnLine
  6. Bulletin of the Center for Children's Books
  7. Horn Book
  8. Kirkus Reviews
  9. Booklist
  10. Book Links
  11. Library Journal
  12. School Library Journal
  13. Other sources will be consulted as appropriate.
- B. Recommendations for purchase may come from administrators, teachers, students, district personnel, and community persons, as appropriate.
- C. Gift materials shall be judged by the criteria outlined and shall be accepted or rejected by those criteria. Because of the work commitment involved in evaluating donations, any gifts of materials should first be approved by the school librarians. Donors should be advised that any materials accepted and not included in the library collection will be discarded.

**V. Removal of Materials from the Collection**

Selection of library media center materials is an ongoing process that should include the removal and discarding of materials no longer appropriate to the library collection, and the replacement of lost and worn materials still of educational value. Materials may be considered for removal or replacement if they:

- A. are in poor physical condition;
- B. are in formats that are considered obsolete;
- C. have not been circulated in recent history;
- D. are outdated in content, use, or accuracy;
  1. Copyright date should be considered; however, the decision to weed is not based solely on the copyright date of the material. Some older material may be considered of great historical value to the collection.
- E. are outdated and unattractive in format, design, graphics, and illustrations;
- F. are biased or employ stereotypes, unless their purpose in the collection is to educate about such views in a social or historical context;
- G. duplicate information which is no longer in demand or which is available in other formats;
- H. are superseded by new or revised information;

## Instruction

### Selection of Library Media Center Materials and Resources

- I. contain information which is inaccessible because they lack a table of contents, adequate indexing, and searching capabilities;
- J. were not selected in accordance with general selection criteria.

Despite the careful selection of library resources and the qualification of those involved in the selection process, objections to library resources may occur. Any resident, employee, or student of the school district may express an informal concern or formal request for reconsideration of a library resource.

## VI. Guiding Principles for Reconsideration

Library staff, school faculty, administrators, and School Library Materials Reconsideration Committee members complete their work using general agreed-upon principles:

- Libraries have diverse materials reflecting differing points of view, and a library's mission is to provide access to information to all users.
- All library users have a First Amendment right to read, view, and listen to library resources.
- The *Library Bill of Rights* and the *Freedom to Read Statement* of the American Library Association can be used as guiding documents.
- Any person has the right to express concerns about library resources and expect to have the objection taken seriously.
- When library resources are reconsidered, the principles of the freedom to read, listen, and view are defended rather than specific materials.
- A questioned item will be considered in its entirety, not judged solely on portions taken out of context.
- Parents and guardians have the right to determine the appropriateness of library resources for their own children and to guide the reading, viewing, and listening of those children. However, parents and guardians should afford the same right to other families; at no point in time will the wishes of one child's parents to restrict the reading or viewing of a particular item for their child(ren) infringe on other parents' rights to permit their child(ren) to read or view the same material.
- Parents or guardians may direct their children not to view or read particular library materials.
- Questioned items will remain in circulation during the reconsideration process.

## VII. Informal Complaints

Persons with a complaint about library print or digital resources should state their concerns to the school library media specialist. The library media specialist will listen attentively to the concerns and attempt to resolve the issue informally. As part of the discussion, the library media specialist will explain the library's selection policy, selection criteria, importance of a diverse collection with resources from many points of view, and the selection process. As they deem necessary, the library media specialist will also direct the complainant to materials which may include the library's mission statement, request for reconsideration of instructional resources form, and the *Library Bill of Rights*.

## Instruction

### Selection of Library Media Center Materials and Resources

If the complaint is not resolved informally, the library media specialist will explain the formal reconsideration process and direct the complainant to the school district's library selection policy with reconsideration procedures and a request for reconsideration of library resources form. If there is concern about multiple items, a separate form must be completed for each item. No library resources should be removed or restricted from use as a result of the informal complaint.

If the completed and signed formal request for reconsideration form has not been received by administration within ten business days, the matter shall be considered closed.

### VIII. Formal Reconsideration

The following procedures should be followed if, after discussing the questioned resource, no resolution is made.

- A. The complainant should ask to speak to the building principal, if they have not done so already.
- B. If the complainant is dissatisfied with earlier informal discussions, the building principal will provide the reconsideration form.
- C. The complainant is required to complete and submit the reconsideration form to the building principal within ten business days.
- D. If a completed reconsideration form is not submitted within ten business days, the matter is considered closed.
- E. Upon receipt of the form, the building principal shall form an ad hoc Reconsideration Committee consisting of the following individuals and provide all members with a copy of the completed reconsideration form:
  1. Assistant Superintendent
    - a. The Assistant Superintendent shall serve as the committee chair and serve as the spokesperson for the committee at all meetings and before the Board of Education when decisions are made.
  2. Building principal
  3. Library media specialist
  4. Teacher representative from appropriate content area of resource being challenged.
- F. The work in question will remain on library shelves and in circulation until a formal decision is made.
- G. The library media specialist(s) in the building where the complaint originated will secure copies of the material in question for the committee to review.
- H. The library media specialist(s) in the building where the complaint originated will provide the Reconsideration Committee with the Library Bill of Rights as well as necessary informational handouts pertaining to intellectual freedom.
- I. The Reconsideration Committee chair shall schedule a formal reconsideration meeting. All committee members shall fully review the resources and any other relevant materials prior to the meeting and shall be allotted sufficient time to do so.
- J. The Reconsideration Committee shall follow the procedures listed below:
  1. A member of the committee shall keep minutes, which should be filed with the chair, during each meeting.

**Instruction**

**Selection of Library Media Center Materials and Resources**

2. At the initial meeting, the committee will review the reconsideration committee guidelines and procedures.
  3. The library media specialist from the building where the complaint originated shall review their professionally prepared materials (reviews, list of awards, etc.) and offer an opportunity for committee members to ask questions.
  4. The committee reserves the right to use outside expertise, if necessary, to help in its decision-making process.
  5. During the initial or subsequent meetings, the committee will make its decision determined by the simple majority to retain or remove the resource.
  6. The chair shall present the committee's written decision (including a minority report, if needed) to the complainant and the superintendent of schools within five business days after the decision is made.
- K. The procedures to appeal to the Reconsideration Committee decision will be as follows:
1. An appeal of the decision must be made in writing to the Board of Education within 10 business days of the Reconsideration Committee chair's formal delivery of the decision to the complainant and the superintendent of schools.
  2. A meeting will be scheduled no later than 20 days after receipt of the appeal. The Board of Education may use a committee to hear the appeal.
  3. At the appeal meeting, the Reconsideration Committee chair will present the committee's decision to the Board.
  4. At the appeal meeting, the complainant or designee will present the petitioner's position.
  5. The Board will review all information and will issue a written response. This response is final.

**Instruction**

**Selection of Library Media Center Materials and Resources**

**Request for Reconsideration of Library Resources Form**

Amity Regional School District No. 5 has delegated the responsibility for selection and evaluation of library resources to a Reconsideration Committee and has established reconsideration procedures to address concerns about those resources.

Submission of this completed form initiates those procedures. If you wish to request reconsideration of library resources, please return the completed form to the building principal.

**Section I:**

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

I represent (check one):

\_\_\_\_ Myself

\_\_\_\_ An organization

Organization Name: \_\_\_\_\_

**Section II:**

Title of Resource: \_\_\_\_\_

Resource Medium:

_____ Book	_____ Film/Video	_____ Magazine	_____ Database
_____ Audio Recording	_____ Digital Resource	_____ Textbook	_____ App
_____ Newspaper	_____ Game	_____ Streaming Media	_____ Other

**Instruction**

**Selection of Library Media Center Materials and Resources**

Author/Producer \_\_\_\_\_

Is the resource part of the school curriculum? \_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_ Unsure

**Section III:**

1. What brought this resource to your attention?

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3a. Have you read, viewed, or listened to the entire resource? \_\_\_\_ Yes \_\_\_\_\_ No

3b. If not, what sections did you review?

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4. What concerns you about the resource?

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**Instruction**

**Selection of Library Media Center Materials and Resources**

5. What action are you requesting the committee consider?

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6. Is there any additional information you wish to share with the committee?

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Name

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Signature

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Date

## Students

### Conduct and Discipline

The Amity Board of Education supports a positive and safe learning environment where each students' academic potential can be achieved. Students have a role in creating a positive and safe environment by treating others with respect and promoting kindness. Students are expected to adhere to the policies regarding conduct and discipline established by the Board for all students in all public schools of the District.

### Areas of Responsibility

**Board of Education** – The Amity Regional School District No. 5 (ARSD/District) Board of Education (Board) holds the certified personnel responsible for the proper conduct and control of students while legally under the supervision and jurisdiction of the school.

**Principals** – The Principals and their designees implement necessary procedures and rules and regulations to render effective the policies of the Board of Education relating to standards of student behavior. The Principal may involve representatives of all areas of school personnel, students, parents, and citizens of the community.

**Teachers** – Teachers are responsible for the instruction of students in rules and regulations of proper conduct, as well as be responsible for proper and adequate control of students. The responsibility and authority of any teacher extends to all students of the school district under the assigned supervision of the teacher and to other students so situated with respect to the teacher as to be subject to the teacher's control.

**Support Staff** - Support staff are responsible for reporting to teachers and administrators, any inappropriate student behavior, to preserve their personal safety, the safety of other students and/or staff, and to safeguard District property as well as to preserve the orderly operation of school.

**Parents** – Parents are expected to cooperate with school authorities regarding the behavior of their children. Parents shall be held responsible for the willful misbehavior of their children.

**Students** - Students are expected to comply with school rules and regulations, as well as Board policies and administrative regulations. Students who fail to comply are subject to disciplinary action including, but not limited to, suspension and expulsion.

## I. Definitions

- A. **Exclusion** means any denial of public-school privileges to a student for disciplinary purposes.
- B. **Emergency** means a situation in which the continued presence of the student in school poses such a danger to persons or property or a disruption of the educational process that a hearing may be delayed until a time as soon after the exclusion of such student as possible.

## Students

### Conduct and Discipline

- C. **School-Sponsored Activity** means any activity sponsored, recognized or authorized by the Board and includes activities conducted on or off school property.
- D. **Removal** is the exclusion of a student for a class period of ninety minutes or less.
- E. **In-School Suspension** means an exclusion from regular classroom activity for no more than ten (10) consecutive school days, but not exclusion from school, provided such exclusion shall not extend beyond the end of the school year in which such in-school suspension was imposed. No student shall be placed on in-school suspension more than fifteen (15) times or a total of fifty (50) days in one school year, whichever results in fewer days of exclusion.
- F. **Suspension (also referred as Out-of-School Suspension or Bus Suspension)** means the exclusion of a student from school and/or transportation services for not more than ten (10) consecutive school days, provided such suspension shall not extend beyond the end of the school year in which such suspension is imposed; and further provided no student shall be suspended more than ten (10) times or a total of fifty (50) days in one school year, whichever results in fewer days of exclusion, unless such student is granted a formal hearing as provided below.
- All suspensions shall be in-school suspensions unless the administration determines for any student enrolled in grades three through twelve, inclusive, that (1) the student being suspended poses such a danger to persons or property or such a disruption of the educational process that the student shall be excluded from school during the period of suspension or (2) that an out-of-school suspension is appropriate based on evidence of previous disciplinary problems that have led to suspensions or expulsion of the student and efforts by the administration to address such disciplinary problems through means other than out-of-school suspension or expulsion, including positive support strategies.
- G. **Expulsion** means the exclusion of a student, grades three to twelve inclusive, from school privileges for more than ten (10) consecutive school days. The expulsion period may not extend beyond one calendar year.
- H. **Dangerous Instrument** means any instrument, article, or substance which, under the circumstances in which it is used or attempted or threatened to be used, is capable of causing death or serious physical injury, and includes a “vehicle.”
- I. **Deadly Weapon** means any weapon, whether loaded or unloaded, from which a shot may be discharged, or a switchblade knife, gravity knife, billy, blackjack, bludgeon or metal knuckles. It may also include pellet guns and/or air soft pistols.
- J. **Firearm**, as defined in 18 U.S.C. §921, means a) any weapon (including a starter gun) that will, is designed to, or may be readily converted to expel a projectile by the action of an explosive, b) the frame or receiver of any such weapon, c) a firearm muffler or silencer, or d)

## Students

### Conduct and Discipline

any destructive device. (A firearm; currently defined by 18 U.S.C. 921, is any weapon that can expel a projectile by an explosive action and includes explosive devices, incendiaries, poison gases, and firearm frames, receivers, mufflers, or silencers.) A firearm, as defined by C.G.S. 53a-3 includes any sawed-off shotgun, machine gun, rifle, shotgun, pistol, revolver, or other weapon, whether loaded or unloaded from which a shot may be discharged. The term firearm does not include an antique firearm.

- K. **Destructive device** includes any explosive, incendiary, or poisonous gas device, including a bomb, a grenade, a rocket having a propellant charge of more than four ounces, a missile having an explosive or incendiary charge of more than one-quarter ounce, a mine, or any other similar device; or any weapon (other than a shotgun or shotgun shell which the Attorney General finds is generally recognized as particularly suited for sporting purposes) that will, or may be readily converted to, expel a projectile by explosive or other propellant, and which has a barrel with a bore of more than ½" in diameter. The term "destructive device" also includes any combination of parts either designed or intended for use in converting any device into any destructive device and from which a destructive device may be readily assembled. A "destructive device" does not include an antique firearm; a rifle intended to be used by the owner solely for sporting, recreational, or cultural purposes; or any device which is neither designed nor redesigned for use as a weapon.
- L. **Martial Arts Weapon** means a nunchaku, kama, kasari-fundo, octagon sai, tonfa, or Chinese star.
- M. **Weapon** means any BB gun, any blackjack, any metal or brass knuckles, any police baton or nightstick, any dirk knife or switch knife, any knife having an automatic spring release device by which a blade is released from the handle, having a blade of over one and one-half inches (1½") in length, any stiletto, any knife the edged portion of the blade of which is four (4) inches and over in length, any martial arts weapon or electronic defense weapon, or any other dangerous or deadly weapon or instrument, unless permitted by law under Connecticut General Statute § 29-38.
- N. **Gang** means a group of juveniles or youths who, acting in concert with each other, or with adults, engage in illegal activities as defined by Connecticut General Statute § 29-7n.
- O. **School Days** shall mean days when school is in session for students.
- P. **Seriously Disruptive of the Educational Process** means any conduct that markedly interrupts or severely impedes the day-to-day operation of a school.
- Q. **Alternate education** means a school or program maintained and operated by the Board of Education that is offered to students in a nontraditional setting and addresses their social, emotional, behavioral, and academic needs. Such program must conform to SBE guidelines and conform to C.G.S. 10-15 and 16 (180 days/900 hours).

## Students

### Conduct and Discipline

## II. Scope of the Student Discipline Policy

### A. Conduct on School Grounds or at a School-Sponsored Activity

Students will be disciplined for conduct on school grounds or at any school-sponsored activity that endangers persons or property, is seriously disruptive of the educational process, or that violates a publicized policy of the Board.

### B. Conduct off School Grounds

1. Students will be disciplined for conduct off school grounds if such conduct is seriously disruptive of the educational process and violative of a publicized policy of the Board. In making a determination as to whether such conduct is seriously disruptive of the educational process, the Administration and the Board of Education may consider, but shall not be limited to the following factors: (1) whether the incident occurred within close proximity of a school; (2) whether other students from the school were involved or whether there was any gang involvement; (3) whether the conduct involved violence, threats of violence, or the unlawful use of a weapon, as defined in section C.G.S. § 29-38, and whether any injuries occurred; and (4) whether the conduct involved the use of alcohol. The Administration and/or the Board of Education may also consider whether such off-campus conduct involved the use of drugs.
2. Students are subject to suspension or expulsion for conduct off school property and outside of school-sponsored activities in accordance with law, for conduct that violates a publicized policy of the Board and is seriously disruptive of the educational process, including but not limited to the following:

Conduct leading to a violation of any federal or Connecticut state law that indicates that the student presents a danger to any person in the school community or school property and/or the conduct resulted in an arrest. Adjudication as a delinquent or a youthful offender as the result of a felony if the conduct leading to the adjudication is determined to pose a danger to the student themselves, other students, school employees or school property.

## III. Actions Leading to Disciplinary Action, including Suspension and/or Expulsion

Conduct which lead to disciplinary action (including but not limited to suspension and/or expulsion) includes conduct on school grounds or at a school-sponsored activity, and conduct off school grounds, as set forth above. Conduct includes, but is not limited to, the following:

1. Possession of any weapon, weapon facsimile, deadly weapon, pistol, knife, blackjack, bludgeon, box cutter, metal knuckles, pellet gun, explosive device, firearm, whether

## Students

### Conduct and Discipline

- loaded or unloaded, whether functional or not, or any other dangerous object. This also includes pellet guns and/or air soft pistols.
2. Unauthorized possession, sale, distribution, use or consumption of tobacco, drugs, narcotics or alcoholic beverages. For the purposes of this Paragraph 2, the term “drugs” shall include, but shall not be limited to, any medicinal preparation (prescription and non-prescription) and any controlled substance whose possession, sale, distribution, use or consumption is illegal under state and/or federal law.
  3. Possession of paraphernalia used or designed to be used in the consumption, sale or distribution of drugs, alcohol or tobacco, as described in subparagraph (2) above.
  4. Striking or assaulting a student, members of the school staff or other persons.
  5. Threatening in any manner any member of the school community, including any teacher, a member of the school administration, any other employee, or a fellow student, including, but not limited to, threats made orally, in writing, or via electronic communication.
  6. Blackmailing, threatening or intimidating school staff or students.
  7. Any act of harassment that is based on, inclusive of, but not limited to, an individual’s race, religion, color, disability, national origin, ancestry, ethnic background, gender, sexual orientation, gender identity or expression, or socioeconomic status or membership in any other protected class.
  8. Bullying on school grounds; at a school-sponsored or school-related activity, function, or program; at a school bus stop; on a school bus or other vehicle owned, leased, or used by the Board; or through the use of an electronic device or an electronic mobile device owned, leased, or used by the Board.
  9. Bullying outside of the school setting if it creates a hostile environment at school for the victim, infringes on the rights of the victim at school, or substantially disrupts the education process or orderly operation of a school.
  10. Engaging in teen dating violence, defined as any act of physical, emotional or sexual abuse, including stalking, harassing and threatening, that occurs between two students who are currently in or who have been in a dating relationship.
  11. Hazing.
  12. Theft.

## Students

### Conduct and Discipline

13. The destruction of real, personal or school property such as, cutting, defacing or otherwise damaging property in any way.
14. Possession or ignition of any fireworks or other explosive materials, or ignition of any material causing a fire.
15. Unauthorized and/or reckless and/or improper operation of a motor vehicle on school grounds or at any school-sponsored activity.
16. Leaving school grounds, school transportation vehicle or a school-sponsored activity without authorization.
17. A walk-out from or sit-in within a classroom or school building or school grounds.
18. Use of or copying of the academic work of another individual and presenting it as the student's own work, without proper attribution.
19. Making an untrue statement of fact about a staff member or member of the school community with malice or reckless disregard for the truth.
20. The possession and/or display of obscenity or pornographic images or the unauthorized or inappropriate possession and/or display of images, pictures, or photographs depicting nudity on school property or at a school-sponsored activity.
21. Inappropriate displays of public affection of a sexual nature and/or sexual activity on school grounds or at a school-sponsored activity.
22. Possession and/or use of a radio, walkman, beeper, paging device, cellular telephone, walkie-talkie or similar electronic device on school grounds or at a school-sponsored activity in a manner that is not in accordance with the District Technology and District Acceptable Use policies.
23. Using computer systems, including email, instant messaging, text messaging, blogging or the use of social media, or other forms of electronic communications, to engage in any conduct prohibited by this policy.
24. Engaging in a plan to stage or create a violent situation for the purposes of recording it by photographing, audio, or video; or recording by photographic audio, or video acts of violence for purposes of later publication. Engaging in a plan to stage sexual activity for the purposes of recording it by photographing, audio, or video; or recording by photographing, audio, or video sexual acts for purposes of later publication.

## Students

### Conduct and Discipline

25. Unauthorized use of or tampering with any school computer, computer system, computer software, Internet connection or similar school property or system, or the use of such property or system for inappropriate purposes.
26. Violation of the District's "Acceptable Use Agreement/Internet Use" for the applicable grade level.
27. Possession and/or use of a laser pointer.
28. Lying, misleading or being deceitful to a school employee or person having authority over the student during any school investigation including knowingly making a false written statement or the filing of a false complaint.
29. Refusal to obey a member of the school staff, or law enforcement authorities, or disruptive classroom behavior.
30. Defiance of school rules and the valid authority of teachers, supervisors, administrators, other staff members and/or law enforcement authorities.
31. Refusal by a student to identify themselves to a staff member when asked.
32. Violation of smoking; dress; transportation regulations, or other regulations and/or policies governing student conduct.
33. The use of obscene or profane language or gestures.
34. Unauthorized entrance into any school facility or portion of a school facility or aiding or abetting an unauthorized entrance.
35. Trespassing on school grounds while on out-of-school suspension or expulsion.
36. Throwing snowballs, rocks, sticks and/or similar objects.
37. Accumulation of offenses such as school and class tardiness, class or study hall or failure to attend detention.
38. Any other violation of school rules or regulations or a series of violations which makes the presence of the student in school seriously disruptive of the educational process and/or a danger to persons or property.
39. Any action prohibited by any Federal or State law which would indicate that the student presents a danger to any person in the school community or school property.

## Students

### Conduct and Discipline

#### IV. Progressive Discipline

Through progressive discipline, principal/designee determines appropriate consequences and/or support to help students improve their behavior, while taking into account the details of each individual circumstance. The goal of all discipline is to teach students why the behavior is inappropriate and to prevent inappropriate student behavior from happening again. Providing students with the opportunity to reflect on their own actions and the impact of these actions is essential to student learning. The following may be taken into consideration when employing progressive discipline:

1. The student's age, grade level, stage of social development, and /or special education needs;
2. The nature and severity of the misbehavior;
3. The impact of the misbehavior on the learning environment and school climate; and
4. Prior referrals for inappropriate behavior.

Within this context, more serious consequences may be considered for inappropriate behavior that escalates or is repeated.

The principal/designee shall consider a range of options to determine the consequences for each situation and to help the student learn from their choices. Possible consequences include, but are not limited to:

1. A conversation with student and/or student's parent/guardian;
2. A review of expectations for student's behavior;
3. Restorative conversations and actions;
4. Recommendation for counseling support;
5. After school detention;
6. Saturday School detention;
7. Loss of privileges (i.e., extracurricular participation, field trips, parking);
8. Suspension or expulsion; and/or
9. A consequence that fits the student's misbehavior.

Each decision on discipline is unique for each student, as it will depend upon the strengths and challenges of the student and the circumstances of the misbehavior. Parent/guardian notification for consequences 1 through 3 (as noted above) is at the discretion of the administrator addressing the violation. Parent notification will be provided for consequences 4 through 9 (as noted above). Notification is generally provided in the form of a phone call, a letter, or an electronic communication which state the nature of the violation and the consequence.

## **Students**

### **Conduct and Discipline**

#### **V. Procedures Governing Removal**

- A. All teachers are hereby authorized to remove a student from class when such student causes a serious disruption of the educational process within the classroom.
- B. Such teacher shall send the student to a designated area and shall immediately inform the building Principal or their designee as to the name of the student and the reason for removal.
- C. No student shall be removed from class more than six (6) times in any year nor more than twice in one week, unless such student is referred to the Building Principal or their designee and granted an informal hearing in accordance with the provisions of this policy.

#### **VI. Procedures Governing Suspension**

- A. The Principal of a school, or designee on the administrative staff of the school, shall have the right to suspend any student for breach of conduct as noted in Section II of this policy for not more than ten (10) consecutive school days. All suspensions shall be in-school suspensions unless the administration determines that for a student enrolled in grades three through twelve, inclusive, (1) the student being suspended poses such a danger to persons or property or such a disruption of the educational process that the student shall be excluded from school during the period of suspension or (2) that an out-of-school suspension is appropriate based on evidence of previous disciplinary problems that have led to suspensions or expulsion of the student and efforts by the administration to address such disciplinary problems through means other than out-of-school suspension or expulsion, including positive support strategies.

In such cases, the following procedures shall be followed:

- 1. Unless an emergency situation exists, no student shall be suspended prior to having an informal hearing before the Principal or designee at which the student is informed of the charges and given an opportunity to respond. In the event of an emergency, the informal hearing shall be held as soon after the suspension as possible.
- 2. Evidence of past disciplinary problems which have led to removal from a classroom, suspension, or expulsion of a student who is the subject of an informal hearing may be received by the Principal, but only considered in the determination of the length of suspension.
- 3. By telephone, the Principal or designee shall notify the parent or guardian of a student and the Superintendent of Schools not later than 24 hours of the suspension following the suspension and state the cause(s) leading to the suspension.
- 4. Whether or not home contact is made with the parent or guardian of such student, the Principal or designee shall forward a letter promptly to such parent or guardian to the

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- last address reported on school records (or to a newer address if known by the Principal or designee), offering the parent or guardian an opportunity for a conference to discuss same.
5. Notice of the original suspension shall be transmitted by the Principal or designee to the Superintendent of Schools or designee by the close of the school day following the commencement of the suspension, but not later than 24 hours after the commencement of the suspension.
  6. The student shall be allowed to complete any classwork, including examinations, missed while under suspension, without penalty.
  7. Notice of the suspension shall be recorded in the student's cumulative educational record. Such notice shall be expunged from the cumulative educational record by the Board if the student graduates from high school. For any student for whom a suspension has been waived or the length of suspension has been shorten pursuant to number 9 below, the student's suspension shall be expunged from the cumulative education record if the student graduates from high school, or if the administration so chooses, at the time the student completes any administration-specified program and meets any other conditions required by the administration, whichever is earlier.
  8. The decision of the Principal or designee with regard to disciplinary actions up to and including suspensions shall be final.
  9. For any student who is suspended for the first time and who has never been expelled, the school administration may shorten the length of or waive the suspension period if the student successfully completes an administration- specified program and meets any other administration-required conditions. Such program shall be at no expense to the student or their parents/guardians.
- B. In cases where the student has already been suspended, or such suspension will result in the student's being suspended, more than ten (10) times or fifty (50) days in a school year, whichever results in fewer days of exclusion, the student shall, prior to suspension, be granted a formal hearing before the Board of Education. The Principal or designee shall report the student to the Superintendent or designee and request a formal Board hearing.
- C. The reassignment of a student from one regular education classroom in the district to another regular education classroom program in the school district shall not constitute a suspension or expulsion.

## VII. Procedures Governing In-School Suspension

- A. The Principal or designee may impose in-school suspension in cases where a student's

## Students

### Conduct and Discipline

conduct endangers persons or property, violates school policy, seriously disrupts the educational process or in other appropriate circumstances as determined by the Principal or designee. Guidelines developed and promulgated by the Commissioner of Education will be utilized by the administration to help determine whether a student should receive an in-school or out-of-school suspension.

- B. In-school suspension may not be imposed on a student without an informal hearing by the building Principal or designee.
- C. In-school suspensions shall be served in the school attended by the student.
- D. No student shall be placed on in-school suspension more than fifteen (15) times or a total of fifty (50) days in one school year, whichever results in fewer days of exclusion.

### VIII. Expulsion Recommendation Procedure

- A. A Principal may consider recommendation or expulsion of a student enrolled in grades three through twelve, inclusive, in a case where they have reason to believe the student has engaged in conduct described at Sections IIA and IIB above.
- B. A Principal must recommend expulsion proceedings in all cases against any student in grades kindergarten through grade twelve, inclusive, whom the administration has reason to believe:
  - 1) The student, on grounds or at a school-sponsored activity, was in possession of a firearm, as defined in 18 U.S.C. 921\*, as amended from time to time, or deadly weapon, dangerous instrument or martial arts weapon, as defined in C.G.S. 53A-3; or the student, off school grounds, did possess such firearm in violation of C.G.S. 29-35 or did possess and use such a firearm, instrument or weapon in the commission of a crime under chapter 952 of the Connecticut General Statutes; or the student, on or off school grounds offered for sale or distribution a controlled substance, as defined in subdivision (9) of C.G.S. 21a-240, whose manufacture, distribution, sale, prescription, dispensing, transporting or possessing with intent to sell or dispense, offering or administering is subject to criminal penalties under C.G.S. 21-277 and 21a-278.
  - 2) In keeping with C.G.S. §10-233d and the Gun Free Schools Act, such a student shall be expelled for one calendar year if the Board of Education or impartial hearing board finds that the student did so possess or so possess and use, as appropriate, such a weapon or firearm, instrument or weapon; or did so offer for sale or distribution such a controlled substance.
  - 3) The Board may modify the period of a mandatory expulsion on a case-by-case basis.

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- 4) A preschool student enrolled in a Board provided preschool program is subject to mandatory expulsion whenever there is reason to believe that the child was in possession of a firearm, as defined in 18 USC 921, as amended from time to time, on or off school grounds or at a preschool program-sponsored event. Such child shall be expelled for one calendar year if, at the expulsion hearing it is determined, that the child did so possess such a firearm. The Board may modify the period of expulsion on a case-by-case basis.
- C. Upon receipt of an expulsion recommendation, the Superintendent may conduct an inquiry concerning the expulsion recommendation.

If the Superintendent or their designee determines that a student should or must be expelled, they shall forward their recommendation to the Board of Education so that the Board of Education can consider and act upon this recommendation.

## VIII. Expulsion Hearing Procedure

### A. Emergency Exception

Except in an emergency situation, the Board of Education shall, prior to expelling the student, conduct a hearing to be governed by the procedures outlined herein. Whenever an emergency exists, the hearing provided for above shall be held as soon as possible after the expulsion.

### B. Hearing Panel

1. Expulsion hearings conducted by the Board will be heard by any three or more Board members. A decision to expel a student must be supported by a majority of the Board members present, provided that no less than three affirmative votes to expel are cast.
2. Alternatively, the Board may appoint an impartial hearing board composed of one or more persons to hear and decide the expulsion matter, provided that no member of the Board may serve on such panel.

### C. Notice

1. Written notice of the expulsion hearing must be given to the student, and, if the student is a minor to their parent(s) or guardian(s) at least five business days prior the time of the hearing.
2. The written notice of the expulsion hearing shall inform the student of the following:
  - a) The date, time, and location of the hearing.

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- b) A short, plain description of the conduct alleged by the administration.
- c) The student may present as evidence, testimony and documents concerning the conduct alleged and the appropriate length and conditions of expulsion, as well as notice that the expulsion hearing will be the student's sole opportunity to present such evidence.
- d) The student may cross-examine witnesses called by the administration.
- e) The student may be represented by any third party of their choice, including an attorney, at their expense or at the expense of their parents.
- f) The notice shall include information concerning the parent/guardian and the student's legal rights regarding expulsion hearings and the legal services that are provided free of charge or at a reduced rate that are available locally (CT Legal Service or source of such services) and how to access such services. An attorney or other advocate may represent any student subject to expulsion proceedings. The student's parent/guardian shall have the right to have the expulsion hearing postponed for up to one week to allow time to obtain representation, except that if an emergency exists, such hearing shall be held as soon after the expulsion as possible.
- g) A student is entitled to the services of a translator or interpreter, to be provided by the Board of Education, whenever the student or their parent(s) or guardian(s) do(es) not speak the English language or is disabled.
- h) The conditions under which the Board is not legally required to give the student an alternative educational opportunity (if applicable).

### D. Hearing Procedures

1. The hearing will be conducted by the Presiding Officer, who will call the meeting to order, introduce the parties, Board members and counsel, briefly explain the hearing procedures, and swear in any witnesses called by the administration or the student.
2. The hearing will be conducted in executive session. A verbatim record of the hearing will be made, either by tape recording or by a stenographer.
3. Formal rules of evidence will not be followed. The Board has the right to accept hearsay and other evidence if it deems that evidence relevant or material to its determination. The presiding officer will rule on testimony or evidence as to it being immaterial or irrelevant.

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4. The hearing will be conducted in two parts. In the first part of the hearing, the Board will receive and consider evidence regarding the conduct alleged by the administration.
5. In the first part of the hearing, the charges will be introduced into the record by the Superintendent or their designee.
6. Each witness for the administration will be called and sworn. After a witness has finished testifying, they will be subject to cross-examination by the opposite party or their legal counsel and by Board members.
7. After the Administration has presented its case, the student will be asked if they have any witnesses or evidence to present. If so, the witnesses will be sworn, will testify, and will be subject to cross examination and to questioning by the Board. The student may also choose to make a statement at this time. If the student chooses to make a statement, they will be sworn and subject to cross examination and questioning by the Board. Concluding statements will be made by the administration and then by the student and/or their representative.
8. In cases where the respondent has denied the allegation, the Board must determine whether the respondent committed the offense(s) as charged by the Superintendent.
9. If the Board determines that the student has committed the conduct as alleged, then the Board shall proceed with the second portion of the hearing, during which the Board will receive and consider evidence regarding the length and conditions of expulsion.
10. When considering the length and conditions of expulsion, the Board may review the student's attendance, academic and past disciplinary records. The Superintendent will make a recommendation as to the discipline to be imposed.
11. Evidence of past disciplinary problems which have led to removal from a classroom, suspension or expulsion of a student being considered for expulsion may be considered only during the second portion of the hearing, during which the Board is considering length of expulsion and nature of alternative educational opportunity to be offered.
12. Where administrators presented the case in support of the charges against the student, such administrative staff shall not be present during the deliberations of the Board either on questions of evidence or on the final discipline to be imposed. The Superintendent may, after reviewing the incident with administrators, and reviewing the student's records, make a recommendation to the Board as to the appropriate

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discipline to be applied.

13. The Board shall make findings as to the truth of the charges, if the student has denied them, and, in all cases, the disciplinary action, if any, to be imposed. The Board shall report its final decision in writing to the student, or if such student is a minor, also to the parent(s) or guardian(s), stating the reasons on which the decision is based, and the disciplinary action to be imposed. Said decision shall be based solely on evidence presented at the hearing.
14. For any student who is suspended for the first time and who has never been expelled, the school administration may shorten the length of or waive the suspension period if the student successfully completes an administration- specified program and meets any other administration-required conditions. Such program shall be at no expense to the student or their parents/guardians.

### IX. Alternative Educational Program for Expelled Students

#### A. Students under sixteen (16) years of age:

Whenever the Board of Education expels a student under sixteen years of age, it shall offer any such student an alternative educational program, which shall be (1) alternative education, as defined, by C.G.S. 10-74j or (2) in accordance with the standards adopted by the State Board of Education (SBE) with an individualized learning plan.

#### B. Students sixteen (16) to eighteen (18) years of age:

The Board of Education will provide an alternative education as defined or in accordance with SBE standards to a sixteen- to eighteen-year-old student expelled for the first time if they request it and if they agree to the conditions set by the Board of Education. The alternative education may include placement in an adult education program for students who are at least seventeens of age. Students participating in an adult education program during a period of expulsion shall not be required to withdraw from school prior to participation. The Board of Education is not required to offer an alternative program to any student between the ages of sixteen and eighteen who is expelled for the second time.

#### C. Students eighteen (18) years of age or older:

The Board of Education is not required to offer an alternative educational program to expelled students eighteen years of age or older.

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#### **D. Students identified as eligible for services under the Individuals with Disabilities Education Act (IDEA):**

If the Board of Education expels a student who has been identified as eligible for services under the Individuals with Disabilities Education Act (“IDEA”), it shall offer an alternative educational program to such student in accordance with the requirements of IDEA, as it may be amended from time to time.

#### **X. Notice of Student Expulsion on Cumulative Record**

- A. Notice of expulsion and the conduct for which the student was expelled shall be included on the students’ cumulative educational record. Such notice, except for the notice of an expulsion of a student in grades 9 through 12 inclusive, based on possession of a firearm or deadly weapon, may be expunged from the cumulative educational record by the Board if the Board determines that the conduct and behavior of the student in the years following the expulsion warrants an expungement. Such notice shall be expunged from the cumulative educational record by the Board if the student graduates from high school.
- B. If a student’s expulsion is shortened or the expulsion period waived based upon the fact that the student was expelled for the first time, had never been suspended, and successfully completed a Board specified program and/or met other conditions required by the Board, the notice of expulsion shall be expunged from the cumulative educational record if the student graduates from high school or, if the Board so chooses, at the time the student completes the Board specified program and meets any other conditions required by the Board.

#### **XI. Change of Residency During Expulsion Proceedings**

##### **A. Student moving into the school district:**

1. If a student enrolls in the district while an expulsion hearing is pending in another district, such student shall not be excluded from school pending completion of the expulsion hearing unless an emergency exists, as defined above. The Board shall retain the authority to suspend the student and/or to conduct its own expulsion hearing.
2. Where a student enrolls in the district during the period of expulsion from another school district, the Board may adopt the decision of the student expulsion hearing conducted by such other school district. The Board shall make its determination based upon a hearing held by the Board which shall be limited to a determination of whether the conduct which was the basis of the expulsion would also warrant expulsion by the Board.

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#### B. Student moving out of the school district:

Where a student withdraws from school after having been notified that an expulsion hearing is pending, but before a decision has been rendered by the Board, the notice of the pending expulsion hearing shall be included on the student's cumulative record and the Board shall complete the expulsion hearing and render a decision. If the Board subsequently renders a decision to expel the student, a notice of the expulsion shall be included on the student's cumulative record.

## XII. Procedures Governing Suspension and Expulsion of Students Identified as Eligible for Services under the Individuals with Disabilities Education Act (IDEA)

#### A. Suspension of IDEA students:

Notwithstanding the foregoing, if the administration suspends a student identified as eligible for services under the IDEA, as reauthorized in 2004, (an "IDEA student") who has engaged in conduct that violated any rule or code of conduct of the school district that applies to all students, the following procedures shall apply:

1. The administration shall not later than the date on which the decision to take disciplinary action is made, notify the parents of the student of the decision to suspend and a copy of the special education procedural safeguards must either be hand delivered or sent by mail to the parents on the date that the decision to suspend was made.
2. During the period of suspension, the school district is not required to provide any educational services to the IDEA student beyond that which is provided to all students suspended by the school district.

#### B. Expulsion and Suspensions that Constitute Changes in Placement for IDEA students:

Notwithstanding any provision to the contrary, if the administration recommends for expulsion an IDEA student who has engaged in conduct that violated any rule or code of conduct of the school district that applies to all students, the procedures described in this section shall apply. The procedures described in this section shall also apply for students whom the administration has suspended in a manner that is considered under the IDEA, as it may be amended from time to time, to be a change in placement.

1. The parents of the student must be notified of the decision to suspend on the date on which the decision to suspend was made, and a copy of the special education procedural safeguards must either be hand-delivered or sent by mail to the parents on the date that the decision to suspend was made.

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2. The school district shall immediately convene the IEP team, but in no case later than ten (10) school days after the recommendation for expulsion or the suspension which constitutes a change in placement was made. The relevant members of the student's IEP team shall consider the relationship between the student's disability and the behavior that led to the recommendation for expulsion or the suspension which constitutes a change in placement, in order to determine whether the student's behavior was a direct manifestation of their disability.
3. If the IEP team finds that the behavior was a direct manifestation of the student's disability, the administration shall not proceed with the recommendation for expulsion. The IEP team shall consider the student's misconduct and revise the IEP to prevent a recurrence of the misconduct and to provide for the safety of other students and staff.
4. If the IEP team finds that the behavior was not a manifestation of the student's disability, the administration may proceed with the recommended expulsion or suspension that constitutes a change in placement.
5. During any period of expulsion, or suspension of greater than ten (10) days per school year, the administration shall provide the student with an alternative education program in accordance with the provisions of the IDEA.
6. The special education records and disciplinary records of the student must be transmitted to the individual(s) who will make the final determination regarding a recommendation for expulsion or a suspension that results in a change in placement.
7. School personnel may remove a disabled student who has violated the conduct code from their current placement for up to 10 school days without a hearing.

#### C. Transfer of IDEA students for Certain Offenses:

School personnel may transfer an IDEA student to an appropriate interim alternative educational setting for not more than forty-five (45) school days if the student:

1. Was in possession of a dangerous weapon, as defined in 18 U.S.C. 930(g)(2), as amended from time to time, on school grounds or at a school-sponsored activity, or
2. Knowingly possessed or used illegal drugs or sold or solicited the sale of a controlled substance while at school or at a school-sponsored activity; or
3. Inflicted serious bodily injury to another person at school, on school premises or at a school function.

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As used in this subsection XIIC., the term “dangerous weapon” means a weapon, device, instrument, material, or substance, animate or inanimate, that is used for, or is readily capable of, causing death or serious bodily injury, except that such term does not include a pocket knife with a blade of less than 2.5 inches in length.

The term “serious bodily injury” means a substantiated risk of death, extreme physical pain, protracted loss or impairment of the function of a bodily member, organ, or mental faculty.

### **XIII. Procedures Governing Suspension and Expulsion of Students Identified as Eligible for Educational Accommodations under Section 504 of the Rehabilitation Act of 1973**

#### **A. Expulsion of students identified as eligible for educational accommodations under Section 504 of the Rehabilitation Act of 1973:**

Notwithstanding any provision to the contrary, if the administration recommends for expulsion a student identified as eligible for educational accommodations under Section 504 of the Rehabilitation Act of 1973 (a “Section 504 Student”) who has engaged in conduct that violated any rule or code of conduct of the school district that applies to all students, the following procedures shall apply:

1. The parents of the student must be notified of the decision to recommend the student for expulsion.
2. The district shall immediately convene the student’s Section 504 team (504 team), for the purpose of reviewing the relationship between the student’s disability and the behavior that led to the recommendation for expulsion, in order to determine whether the student’s behavior was a manifestation of their disability.
3. If the 504 team finds that the behavior was a manifestation of the student’s disability, the administration shall not proceed with the recommendation for expulsion. The 504 team shall consider the student’s misconduct and revise the 504 plan to prevent a recurrence of the misconduct and to provide for the safety of other students and staff.
4. If the 504 team finds that the behavior was not a manifestation of the student’s disability, the administration may proceed with the recommendation for expulsion.

### **XIV. Notification to Parents or Guardian**

- A. The parents or guardian of any minor student either expelled or suspended or removed from class shall be given notice of such disciplinary action within twenty- four (24) hours of the

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time of the institution of the period of expulsion, suspension or removal from class.

- B. The Superintendent of Schools shall forward to the student concerned and their parents, or the student if they have attained the age of 18, a copy of this Board policy on student discipline at the time the Superintendent sends out the notice that an expulsion hearing will be convened.

### XV. Early Readmission to School

An expelled student may apply for early readmission to school. The Board delegates the authority to make decisions on readmissions to the Superintendent. Students desiring readmission to school shall direct such readmission requests to the Superintendent. The Superintendent has the discretion to approve or deny such readmission requests and may condition readmission on specified criteria.

### XVI. Exclusion from Co-Curricular and Extra-Curricular Activities

Participation in co-curricular and extra-curricular activities is a privilege and not an entitlement. Students involved in such programs are expected to follow all school rules and demonstrate good citizenship. Failure to do so may result in partial or complete exclusion from said activities and programs. Activities include, but are not limited to, athletic programs, musical or drama productions, clubs, class activities, proms and school dances, graduation ceremonies, field trips, and school trips out-of-state and abroad.

### XVII. Expulsion and Readmission of a Student Placed in a Diversionary Program, Juvenile Residential Center or Other Residential Placement

1. Any student who commits an expellable offense and is subsequently placed in a juvenile residential center or any other residential placement for such offense may be expelled by the Board. The period of expulsion shall run concurrently with the period of placement in a juvenile residential center or other residential placement.
2. If a student who committed an expellable offense seeks to return to the school district after participating in a diversionary program or having been placed in a juvenile residential center or any other residential placement and such student has not been expelled by the board of education for such offense, the board of education shall allow such student to return and may not expel the student for additional time for such offense.

### XVIII. Dissemination of Student Conduct and Discipline Policy

The Board of Education shall, at the beginning of each school year and at such other times as it may deem appropriate, provide for an effective means of informing all students, parent(s) and/or guardian(s) of this policy.

## Students

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#### XIX. Compliance with Reporting Requirements

- A. The Board of Education shall report all suspensions and expulsions to the State Department of Education.
- B. If the Board of Education expels a student for sale or distribution of a controlled substance, the Board shall refer such student to an appropriate state or local agency for rehabilitation, intervention or job training and inform the agency of its action.
- C. If the Board of Education expels a student for possession of a deadly weapon or firearm, as defined in C.G.S. §53a-3, the violation shall be reported to the local police.

(cf. 5128.1 – Plagiarism)

(cf. 5131.1 – Bus Conduct)

(cf. 5131.21 – Threats or Acts of Violence)

(cf. 5131.5 – Vandalism)

(cf. 5131.6 – Drugs, Alcohol, Tobacco)

(cf. 5131.7 – Weapons and Dangerous Instruments)

(cf. 5131.8 – Off-School Grounds Misconduct)

(cf. 5131.81 – Use of Cell Phones and Other Electronic Communication Devices)

(cf. 5131.91 – Hazing)

(cf. 5131.911 – Bullying Regulation and Teen Dating Violence)

(c.f. 5144.12 – Student Discipline: Restorative Practice)

(c.f. 5145.45 – Non-Discrimination)

(c.f. – 5145.5 – Prohibition Against Sexual Harassment)

Legal References: Connecticut General Statutes

4-177 – 4-180 Contested cases. Notice. Record, as amended

10-74j Alternative education (PA 15-133)

10-233a through 10-233f Suspension, removal and expulsion of students, as amended by PA 95-304, PA 96-244, PA 98-139, PA 07-66, PA 07-122, PA 08-160, PA 09-82, PA 09-6 (September Special Session), PA 10-111, PA 14-229, PA 15-96, PA 16-147, PA 17-220 and PA 19-91

10-233f In-school suspension of students

*Packer v. Board of Educ. of the Town of Thomaston*, 246 Conn.89 (1998).  
Public Act 98-139

*Honig v. Doe*, (United States Supreme Court 1988)

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Individuals with Disabilities Act, 20 U.S.C. 1400 et seq. as amended by the Individuals with Disabilities Education Act Amendments of 1997 (P.L. 105-17). Section 504 of the Rehabilitation Act of 1973, 29 U.S.C. § 794(a)

P.L. 108-446 Individuals with Disabilities Education Improvement Act of 2004

*State v. Hardy*, 896 A.2d 755, 278 Conn. 113 (2006)

## Students

### Weapons and Dangerous Instruments

The Amity Regional School District No. 5 (District) Board of Education (Board) has determined that possession, concealment, and/or use of a weapon by a student is detrimental to the welfare and safety of the students and school personnel within the district. Possession and/or use of any weapon, including martial arts weapons and deadly weapons, dangerous instrument, firearm, or destructive device in any school building on school grounds, in any school vehicle, or at any school-sponsored activity is prohibited.

A “weapon” means any BB gun, any blackjack, any metal or brass knuckles, any police baton or nightstick, any dirk knife or switch knife, any knife having an automatic spring release device by which a blade is released from the handle, having a blade of over one and one-half inches (1½”) in length, any stiletto, any knife the edged portion of the blade of which is four (4) inches and over in length, any martial arts weapon or electronic defense weapon, or any other dangerous or deadly weapon or instrument, unless permitted by law under Connecticut General Statute § 29-38.

A “martial arts weapon” means a nunchaku, kama, kasari-fundo, octagon sai, tonfa, or Chinese star.

A “dangerous instrument” means any instrument, article, or substance which, under the circumstances in which it is used or attempted or threatened to be used, is capable of causing death or serious physical injury, and includes a “vehicle.” A “deadly weapon” means any weapon, whether loaded or unloaded, from which a shot may be discharged, or a switchblade knife, gravity knife, billy, blackjack, bludgeon or metal knuckles. It may also include pellet guns and/or air soft pistols.

“Firearm”, as defined in 18 U.S.C. §921, means a) any weapon (including a starter gun) that will, is designed to, or may be readily converted to expel a projectile by the action of an explosive, b) the frame or receiver of any such weapon, c) a firearm muffler or silencer, or d) any destructive device. (A firearm; currently defined by 18 U.S.C. 921, is any weapon that can expel a projectile by an explosive action and includes explosive devices, incendiaries, poison gases, and firearm frames, receivers, mufflers, or silencers.) A firearm, as defined by C.G.S. 53a-3 includes any sawed-off shotgun, machine gun, rifle, shotgun, pistol, revolver, or other weapon, whether loaded or unloaded from which a shot may be discharged. The term firearm does not include an antique firearm.

“Destructive device” includes any explosive, incendiary, or poisonous gas device, including a bomb, a grenade, a rocket having a propellant charge of more than four ounces, a missile having an explosive or incendiary charge of more than one-quarter ounce, a mine, or any other similar device; or any weapon (other than a shotgun or shotgun shell which the Attorney General finds is generally recognized as particularly suited for sporting purposes) that will, or may be readily converted to, expel a projectile by explosive or other propellant, and which has a barrel with a bore of more than ½" in diameter. The term "destructive device" also includes any combination of parts either designed or intended for use in converting any device into any destructive device

## Students

### Weapons and Dangerous Instruments

and from which a destructive device may be readily assembled. A “destructive device” does not include an antique firearm; a rifle intended to be used by the owner solely for sporting, recreational, or cultural purposes; or any device which is neither designed nor redesigned for use as a weapon.

The possession or use of any such weapon or devices will require that the proceedings for the suspension and/or expulsion of the student involved will be initiated immediately by the principal. If the student is found to have possessed a firearm or other dangerous weapon as defined in Connecticut General Statutes 53a-3 in violation of 29-35 or 53-206, in or on the real property of a school or at any school activity as defined in Connecticut General Statutes 10-233a, he/she must be expelled for one calendar year. The Board of Education or hearing board may modify the period of expulsion on a case-by-case basis. To comply with federal law, any finding of an exception shall be reduced to writing. All legal restrictions and requirements will be adhered to pertaining to special education students.

The Board shall consider a student's conduct off school grounds that is seriously disruptive of the educational process or is violative of publicized policies of the Board as grounds for expulsion.

Weapons under the control of law enforcement personnel are permitted. The Superintendent may authorize other persons to possess weapons for courses, programs and activities approved by the District and conducted on District property.

(c.f. 5131 – Conduct and Discipline)

(cf. 5145.12 – Search and Seizure)

Legal Reference: Connecticut General Statutes

[10-221](#) Boards of education to prescribe rules.

[10-233a](#) through [10-233f](#) - Expulsion as amended by PA 95-304

[53a-3](#) Definitions.

[53a-217b](#) - Possession of firearms and deadly weapons on school grounds

[53-206](#) Carrying and sale of dangerous weapons.

PA 94-221 An Act Concerning School Discipline and Safety.

Gun-Free School Zones Act of 1990, 18 U.S.C. §§ 921(a)(25)-(26), 922(q) (2006)

GOALS 2000: Educate America Act

Policy Approved:

AMITY REGIONAL SCHOOL DISTRICT NO. 5  
Woodbridge, Connecticut

**Students**

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18 U.S.C. 921 Definitions.

20 U.S.C. §7961, The Gun-Free School Act, 8561 of the Every Student Succeeds Act.

Youth Handgun Safety Act, 18 U.S.C. §§ 922(x), 924(a)(6) (2006)

Safe and Drug-Free Schools and Communities Act, 20 U.S.C. §§ 7101-7117

## **Students**

### **Out of School Misconduct**

Students are subject to discipline, up to and including suspension and expulsion for misconduct, which is seriously disruptive of the educational process and is a violation of a publicized Amity Regional School District No. 5 (District) Board of Education (Board) policy, even if such misconduct occurs off-school property and during non-school time.

In compliance with judicial decisions, the Board considers conduct which is "severely disruptive of the educational process" to mean conduct that "markedly interrupts or severely impedes the day to-day operations of a school" in addition to such conduct also being violative of publicized school policy. Such conduct includes, but is not limited to, making a bomb threat, or making any threat, off school grounds, to kill or hurt a teacher or student.

In making a determination as to whether conduct is "seriously disruptive of the educational process," the administration may consider, but such consideration shall not be limited to:

1. whether the incident occurred within close proximity of the school;
2. whether other students from the school were involved or whether there was any gang involvement;
3. whether the conduct involved violence, threats of violence or the unlawful use of a weapon, as defined in section 29-38 and whether any injuries occurred; and
4. whether the conduct involved the use of alcohol and/or drugs.

The Board, in matters of expulsion for out-of-school misconduct, in making a determination as to whether conduct is "seriously disruptive of the educational process," may consider, but consideration is not limited to the same items listed previously.

Such discipline may result whether:

1. The incident was initiated in the school or on school grounds, or
2. Even if the incident occurred or was initiated off school grounds and non-school time; if after the occurrence there was a reasonable likelihood that return of the student would contribute to a disruptive effect on the school education or its process by threatening:
  - a. The school's orderly operations;
  - b. The safety of the school property;
  - c. The welfare of the persons who work or study there.

Examples of the type of such off-school misconduct that may result in such discipline include but are not limited to:

1. Use, possession, sale, or distribution of dangerous weapons; (as defined C.G.S. 53a 3, 53-206, and 29-35)
2. Use, possession, sale, or distribution of illegal drugs;
3. Violent conduct;
4. Making of a bomb threat; or
5. Threatening to harm or kill another student or member of the staff.

**Policy approved:** (Date)

AMITY REGIONAL SCHOOL DISTRICT NO. 5  
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### Out of School Misconduct

For example, if it is determined that a student's use, possession, or sale of drugs in the community has a reasonable likelihood of endangering the safety of students or employees because of the possibility of such sales in the school; or if violent conduct in the community presents a reasonable likelihood of repeating itself in the school environment; or if any similar type of misconduct in the community has a reasonable likelihood of being continued or repeated in school or of bringing retaliation or revenge into the school for such off-school misconduct, the Board may impose discipline up to and including suspension and/or expulsion. The rationale to be applied in considering disciplinary action is whether the off school grounds conduct will markedly interrupt or severely impede the day-to-day operation of a school.

A student who possessed and used a firearm, deadly weapon, dangerous instrument or martial arts weapon in the commission of a crime off-campus shall be expelled for one calendar year unless said expulsion is modified on an individual case basis.

### Regulation of Off-Campus Speech

It is recognized that some off-campus speech can be harmful and subject to regulation by District officials. The regulatory interests of the District and its schools remain significant in some off-campus circumstances. Such circumstances involving off-campus speech in which the District has an interest include, but are not limited to, the following:

- serious or severe bullying or harassment targeting particular individuals;
- threats aimed at teachers or students;
- the failure to follow rules concerning lessons, the writing of papers, the use of computers or participation in other online school activities; and
- breaches of school security devices, including material maintained within school computers.

In order for the District to take disciplinary action regarding student off-campus speech, school officials are limited to those situations where it can be reasonably forecast that the student speech in question will materially disrupt classwork or involve substantial disorder in the school setting. Off-campus student speech may be regulated only in compelling circumstances.

Legal Reference: Connecticut General Statutes

4-176e through 4-185 Uniform Administrative Procedure Act.

10 233a through 10 233f re in school suspension, suspension, expulsion.

29 35 Carrying of pistol or revolver without permit prohibited.

29 38 Weapons in vehicles.

53a 3 Firearms and deadly weapons.

**Policy approved:** (Date)

AMITY REGIONAL SCHOOL DISTRICT NO. 5  
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**Out of School Misconduct**

53 206 Carrying and sale of dangerous weapons.

53a 217b Possession of firearms and deadly weapons on school grounds.

18 U.S.C. 921 Definitions.

PL 103 382 Elementary and Secondary Education Act. (Sec. 14601 Gun Free Requirements: Gun Free School Act of 1994)

Kyle P. Packer PPA Jane Packer v. Thomaston Board of Education. (SC 15862)

Wisniewski v. Bd. Of Educ., 494 F.3d34 (2nd Cir. 2007)

Doninger v. Niehoff, 257F.3d (2nd Cir. 2008)

Mahanoy Area School District v. B.L. (S.C. 20-255) June 23, 2021