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AMITY REGIONAL SCHOOL DISTRICT NO. 5

Bethany Orange Woodbridge 25 Newton Road, Woodbridge, Connecticut 06525

Dr. Jennifer P. Byars Superintendent of Schools

AMITY REGIONAL BOARD OF EDUCATION REGULAR MEETING AGENDA Monday, June 12, 2023, 6:30 pm 25 Newton Road, Woodbridge, CT

- 1. CALL TO ORDER
- 2. PLEDGE OF ALLEGIANCE
- 3. **APPROVAL OF MINUTES** page 4
 - a. Board of Education Regular Meeting May 08, 2023
- 4. STUDENT REPORT
 - a. Monthly Report
 - b. One Book One Amity Video
- 5. PUBLIC COMMENT
- 6. SUPERINTENDENT'S REPORT
 - a. Personnel Report page 10
 - b. Superintendent Report page 12
- 7. CORRESPONDENCE
- 8. CHAIRMAN'S REPORT
 - a. Committee Reports
 - 1. ACES
 - 2. CABE
 - 3. Communications
 - 4. Curriculum
 - 5. District Health and Safety
 - 6. Diversity, Equity, and Inclusion Executive Committee
 - 7. District Technology page 16
 - a. Monthly Report
 - 8. Facilities page 17
 - a. Monthly Report
 - 9. Finance
 - a. Discussion and Possible Action on Contracts over \$35,000 page 18
 - 1. Middle School Roof Projects
 - 2. Sidewalk Repairs

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- 3. Security Camera Video Monitoring System
- b. Discussion and Possible Action on Tuition Rate for 2023-2024 page 21
- c. Discussion of Monthly Financial Statements page 23
- d. Director of Finance and Administration Approved Transfers Under \$3,000 page 57
- e. Discussion and Possible Action on Budget Transfers of \$3,000 or More page 60

10. Policy

- a. First Read
 - 1. Policy 5121 Students Examination/ Grading/ Rating page 62
 - 2. Policy 5121.3 (Former Policy 5128.1) Plagiarism/ Cheating page 63
- b. Discussion and Possible Action on Second Read Policies
 - 1. Policy 5114.21 Conduct Code Participation in Extracurricular Activities page 64

11. Personnel

- a. Discussion on Non- Union Wages (anticipated Executive Session)
- b. Discussion on the Standard Benefits Package (anticipated Executive Session)
- c. Possible Action on Non- Union Wages and the Standard Benefits Package
- 9. **NEW BUSINESS**
- 10. ITEMS FOR THE NEXT AGENDA Due to Chairperson by July 31, 2023
- 11. ADJOURNMENT

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

pc: Town Clerks Bethany, Orange, Woodbridge

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

District Mission Statement

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

thirfer Byars

AMITY REGIONAL SCHOOL DISTRICT NO. 5 BOARD OF EDUCATION



Bethany Orange Woodbridge

NORMS

BE RESPECTFUL

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

HONOR THE POSITION

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

REPRESENT THE BOARD WITH UNITY AND PRIDE

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

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AMITY REGIONAL SCHOOL DISTRICT NO. 5

Bethany Orange Woodbridge 25 Newton Road, Woodbridge, Connecticut 06525

Dr. Jennifer P. Byars Superintendent of Schools

AMITY REGIONAL BOARD OF EDUCATION REGULAR MEETING AGENDA

Monday, May 08, 2023, 6:30 pm 25 Newton Road, Woodbridge, CT

BOARD MEMBERS PRESENT

Christopher Browe, Paul Davis, Carla Eichler, Sean Hartshorn, Andrea Hubbard, Christina Levere-D'Addio, Dr. Carol Oladele, Patrick Reed, Donna Schuster, Amy Tirollo, Dr. Jennifer Turner

BOARD MEMBERS ABSENT

Shannan Carlson and Dr. K. Sudhir

STUDENT BOARD MEMBERS PRESENT

Sam Bae

STAFF MEMBERS PRESENT

Dr. Jennifer Byars, Theresa Lumas, Frank Purcaro, Dr. Tracy, Jill LaPlante, Kathy Burke

1. CALL TO ORDER

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

2. PLEDGE OF ALLEGIANCE

3. APPROVAL OF MINUTES

a. Board of Education Public Hearing - April 03, 2023

MOTION by Sean Hartshorn, SCECOND by Patrick Reed, to approve minutes as submitted VOTES IN FAVOR, 7 (Browe, Eichler, Hartshorn, Hubbard, Levere-D'Addio, Dr. Oladele, Reed, Dr. Turner) ABSTAINED, 4 (Davis, Schuster, Tirollo)

MOTION CARRIED

Board of Education Regular Meeting - April 03, 2023

MOTION by Patrick Reed, SCECOND Sean Hartshorn to approve minutes as submitted VOTES IN FAVOR, 8 (Browe, Eichler, Hartshorn, Hubbard, Levere-D'Addio, Dr. Oladele, Reed, Dr. Turner) ABSTAINED, 3 (Davis, Schuster, Tirollo) MOTION CARRIED

c. Board of Education Special Meeting - Annual Meeting May 01, 2023

MOTION by Patrick Reed, SCECOND Sean Hartshorn to approve minutes as submitted VOTES IN FAVOR, 7 (Browe, Eichler, Hartshorn, Levere-D'Addio, Reed, Tirollo, Dr. Turner) ABSTAINED, 4 (Davis, Hubbard, Dr. Oladele, Schuster)

4. STUDENT REPORT

a. Monthly Report

Presented by Sam Bae

5. RECOGNITION OF STUDENTS

a. CABE Student Leadership Awards – 2023

Presented by Dr. Jennifer Byars, Dr. Tracy, Mrs. Jill LaPlante, Mrs. Kathy Burke

6. PUBLIC COMMENT

Orange Parent:

Asked the Board and all those present to acknowledge/celebrate Memorial Day and ask for a ten second moment of silence in honor of veterans who have fought. Offered thanks and appreciation and continued confidence in the work that all the teaching staff and support staff at AR5 do and for the leadership team under Dr. Byars and BOE members. Announced the passing of the budget referendum to support education in Amity.

Woodbridge Resident:

Addressed Slides that were shared in preparation for the referendum. Addressed that the policy of the school is not to tell the people how to vote. Suggests that the only information that should have been shared is date, time and location. Addressed the incident of a student lighting a gay pride flag in class and voiced their belief that the incident shows that DEI is not working. Listed the name of several publications containing articles that suggest DEI makes issues persist or grow worse. Stated that mandating DEI causes individuals to be adversarial or resentful toward that mandate.

Orange Parent:

Commended the board on the May 22nd invitation to discuss academics. Asked that the forum include mental health as well. Stated she has not received replies to numerous emails sent. Parent shared data regarding gender identity and gender reassignment. Asks that her statements be shared as facts on the record. Listed seven areas of concern: Privacy, Safety, Equality, Liberty, Family, Bodily integrity, Ideology. Accused the Board of violating all seven on those areas. Accused the Board of lying regarding what DEI. Mr. Davis defended the Board against the accusation of lying and asked parent to sit down; parent concluded by asking for the resignation of every board member who supports DEI.

7. SUPERINTENDENT'S REPORT

- a. Personnel Report
- b. Superintendent Report

Presented by Amity Region 5 Superintendent of School Dr. Jennifer Byars

8. CORRESPONDENCE

Presented by Amity Board of Education Secretary Mr. Sean Hartshorn

9. CHAIRMAN'S REPORT

- a. Committee Reports
 - 1. ACES
 - CABE
 - 3. **Communications**
 - 4. Curriculum
 - 5. **District Health and Safety**
 - 6. Diversity, Equity, and Inclusion Executive Committee
 - 7. **District Technology**
 - a. Monthly Report
 - 8. Facilities
 - a. Monthly Report
 - 9. **Finance**
 - a. Presentation and Discussion of First Quarter 2023 Executive Summary Review of Amity Pension Fund, Sick and Severance Account and OPEB Trust

Presented by Fiducient representative Chris Kachmar

- b. Discussion and Possible Action on Contracts over \$35,000
- c. Renewals:
 - 1. Student Accident

MOTION by Carla Eichler, SECOND by Patrick Reed, to award the Student Accident Insurance bid to H.D. Segur Insurance of Wallingford, CT for the third year of the contract for \$34,505 for Interscholastic Sports, including Student Activities and \$2,910 for Catastrophic Accident Coverage.

VOTES IN FAVOR, 11 (UNANIMOUS) MOTION CARRIED

d. Discussion and Possible Action on Healthy Food Certification

MOTION by Patrick Reed, SECOND by Sean Hartshorn, to accept the mandatory state language as presented with respect to the Health Food Program statement for July 1, 2023- June 30, 2024

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

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

VOTES IN FAVOR, 11 (UNANIMOUS)
MOTION CARRIED

e. Discussion and Possible Action on Building Use Rates

MOTION by Sean Hartshorn, SECOND by Donna Schuster, to approve the revised Brady Center fee structure for July 1, 2023 and add to the existing list of rental charges.

VOTES IN FAVOR, 11 (UNANIMOUS)

MOTION CARRIED

f. Discussion of Monthly Financial Statements

Presented by Amity Region 5 Director of Finance Theresa Lumas

g. Director of Finance and Administration Approved Transfers Under \$3,000

Presented by Amity Region 5 Director of Finance Theresa Lumas

h. **Discussion and Possible Action on Budget Transfers of \$3,000 or More** *MOTION by* Christopher Browe, *SECOND by* Andrea Hubbard *to approve the following budget transfer for concrete repair, modular refurbishing at Amity Middle School- Bethnay, IXL software, OPEB Trust and Security cameras.*

Without objection all five motions taken together as one.

Mr. Frank Puracro, Amity Region 5 Assisstant Superintendent, speaks on the benefit of IXL Math program as opposed to other programs that exists.

Move to approve the following budget transfer for concrete sidewalk repair.

ACCOUNT			
NUMBER	ACCOUNT NAME	FROM	TO
01-14-2600-5720	Improvements to Sites	\$14,000	
02-14-2600-5720	Improvements to Sites	\$10,000	
03-14-2600-5720	Improvements to Sites		\$24,000

Move to approve the following budget transfer for modular refurbishing at Amity Middle School- Behtany

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ACCOUNT				
NUMBER	ACCOUNT NAME	FROM	TO	
05-15-0000-5850	Contingency	\$9,000		
03-14-2600-5410	Utilities	\$24,540		
01-14-2600-5715	Improvements to Bldgs		\$33,540	

Move to approve the following budget transfer for IXL Software

ACCOUNT			
NUMBER	ACCOUNT NAME	FROM	TO
05-13-2212-5581	Travel-Conferences	\$2,950	
05-13-2213-5581	Travel-Conferences	\$2,950	
05-13-2213-5611	Instructional Supplies	\$2,950	
05-14-2350-5695	Technology Software		8,850

Move to approve the following budget transfer to make the full Actuarial Determined Employer Contribution (ADEC)

ACCOUNT			
NUMBER	ACCOUNT NAME	FROM	TO
04-12-6110-5560	Tuition- Sped-Public	\$111,758	
05-15-0000-5860	OPEB Trust		\$111,758

Move to approve the following budget transfer for security cameras at all three schools.

ACCOUNT			
NUMBER	ACCOUNT NAME	FROM	TO
05-15-0000-5850	Contingency	\$48,769.00	
05-14-2660-5330	Security -Professional/Tech	\$ 99.49	
05-14-2660-5690	Security –Other Supplies	\$ 3.03	
05-14-2660-5695	Security-Tech Supplies/Software	\$2,140.00	
05-14-2660-5715	Security-Improvements to Bldg	\$ 370.22	
05-14-2350-5731	Security -Replacement Equipment		\$51,381.74

VOTES IN FAVOR, 11 (UNANIMOUS) MOTION CARRIED

i. Discussion and Possible Action on Standard Year-End Transfers

MOTION by Andrea Hubbard, SECOND by Dr. Turner, to move to authorize the Director of Finance and Administration to make the necessary budget transfer to salary and benefit accounts and to pay other standard charges. These budget transfers may exceed \$3000. The Director of Finance and Administration will report all budget transfers made to the Amity Finance Committee and Amity Board of Education.

VOTES IN FAVOR, 11 (UNANIMOUS)

MOTION CARRIED

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10. **Policy**

- a. First Read
 - 1. Policy 5114.21 Conduct Code Participation in Extracurricular Activities
 - 2. Policy 9311 Formulation, Adoption, Amendment of Policies
- b. Discussion and Possible Action on Second Read Policies
 - 1. Policy 0524 Bias Incidents in Schools

MOTION by Sean Hartshorn, SECOND by Amy Tirollo, accept Policy 0524 Bias Incidents in Schools as submitted VOTES IN FAVOR, 11 (UNANIMOUS)

MOTION CARRIED

2. Policy 6144 Controversial Topics

MOTION by Amy Tirollo, SECOND by Carla Eichler, accept Policy 6144 Controversial Topics as submitted VOTES IN FAVOR, 11 (UNANIMOUS)
MOTION CARRIED

11. Personnel

- 10. NEW BUSINESS
- 11. ITEMS FOR THE NEXT AGENDA Due to Chairperson by May 31, 2023
- 12. ADJOURNMENT

Meeting was adjourned, without objection, at 8:33 p.m. by Chairman Davis.

Respectfully submitted, *Lisa Zaleski*Lisa Zaleski

BOE Recording Secretary

AMITY REGIONAL SCHOOL DISTRICT NO. 5

Bethany Orange Woodbridge 25 Newton Road, Woodbridge, Connecticut 06525



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

June 12, 2023

To: Members of the Board of Education

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

Re: Personnel Report

New Hires-Certified:

• Amity Regional High School:

Emily Connelly – F/T Social Studies Teacher – Emily completed her student teaching at Hall High School in the West Hartford Public School District. One of her passions as a teacher is fostering in her students an interest in entering the field of teaching. Emily earned a Bachelor's of Science Degree in Education and also a Bachelor's of Arts Degree in Psychological Sciences. She is currently completing her Master's Degree in Curriculum and Instruction all from the University of Connecticut; Storrs.

Gunnar Poulimas – F/T Physical Education/Health Teacher – Gunnar completed his student teaching in the Newtown School District and in Region 15 School District. Since that time, he has served as a long term substitute for Orange Elementary School District as well as Staples High School in Westport. Gunnar also served as the JV Boys Volleyball Coach in Amity for the Spring 2022 season. He earned his Bachelor's Degree in Physical Education and is currently completing his Master's Degree in School Health, both from Southern Connecticut State University.

Natalia Panesso – F/T Spanish Language Teacher – Natalia completed her student teaching at Musak High School in the Monroe Public School District and was also hired as their permanent building substitute. She earned her Bachelor's Degree in Political Science from John Jay College of Criminal Justice and is completing her Master's Degree in Secondary Spanish from Sacred Heart University.

Xuelian Yan – .6 FTE Chinese Language Teacher – Xuelian brings a unique educational experience to Amity. Xuelian attended high school in Chengdu, China and also attended Mianyang, China Teacher's College where she earned her Bachelor Degree in Elementary Education. She completed her student teaching at Anchang Road Elementary School in Mianyang, China and was a volunteer teacher in Ratchaburi, Thailand. Xuelian is completing her Master's Degree in Curriculum & Instruction from University of Connecticut.

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

Kaylee Kelsey – F/T Music Teacher - Kaylee completed her student teaching at Valley Stream 13 School District in Valley Stream, NY and also in the Syosset School District in Syosset, NY. Most recently she has been employed as a long term substitute Music Teacher at Bulkeley Middle School in Rhinebeck, NY. Kaylee was also a Private Voice & Piano Teacher coordinating student recitals and group lessons. She earned her Bachelor's Degree in Music Education from Hofstra University and is currently pursuing her Master's Degree in Music from Columbia University.

♣ New Hires-Bench/Long Term Substitutes: None

♣ NEW HIRES-NON-CERTIFIED:

Kathleen Habersang - Paraprofessional - Amity Middle School-Bethany

♣ NEW HIRES-COACHES:

Andrew Townsend - Boys Ice Hockey Coach - 2023 Winter Season - Amity Regional High School

TRANSFERS:

Deborah DeMeo— FT Math Teacher at Amity Regional High School to the position of shared Math Intervention Specialist at Amity Middle School-Bethany & Orange, effective 2023-2024 school year.

RESIGNATIONS:

Kimberly Vigil – Spanish Language Teacher, Amity Middle School-Orange, eff. 06/12/2023

Kara Crotta – Science Teacher, Amity Middle School-Orange, eff. 06/12/2023

Jennifer Adelson – Math Teacher, Amity Middle School-Orange, eff. 06/12/2023

Talia Marinaccio – School Social Worker, Amity Middle School-Bethany, eff. 06/12/2023

Kevin Berean – Technology Education Teacher, Amity Middle School-Bethany, eff. 06/12/2023

RETIREMENTS:

Kathleen Habersang – Science Teacher, Amity Middle School-Bethany, eff. 06/30/2023

AMITY REGIONAL SCHOOL DISTRICT NO. 5

Bethany Orange Woodbridge 25 Newton Road, Woodbridge, Connecticut 06525



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

Superintendent's Report – June 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.

CONGRATULATIONS TO THE CLASS OF 2023!

Instruction

OBOA Revealed!: This year, ONE BOOK/ONE AMITY (OBOA), Amity's summer reading program, will be linked to the *Portrait of the Graduate*, asking students in grades 7-12 to begin thinking about how each characteristic plays a role in a summer reading book of their choice. This means students can read any book of their choice, fiction, nonfiction, graphic novel, audiobook, and make a connection to one of the Portrait of a Graduate characteristics: communicator, collaborator, empathizer, problem solver, and planner. All information regarding this program was revealed to all Amity students on Tuesday, May 30, 2023, as students watched a reveal video and received a Portrait of a Graduate bookmark. This bookmark had a QR code on the back which included all of the necessary information for parents and students. *Please click here to view the 2023 One Book One Amity (OBAO) Theme Reveal Video*.

UELP & SIP Showcase: On May 15, 2023, members of the Senior class began their participation in either the off-campus UELP job-shadowing opportunities or on-campus Student Interest Projects that students designed for themselves. After three weeks of self-guided learning, the Seniors returned to campus on June 2, 2023, for the Senior Presentation exhibition, in which seniors presented information about their projects to groups of students in grades 9-11. This was the first time ARHS has had all Seniors participate in the program, and the feedback from faculty and students was that the program and presentations were a huge success.

Middle School Stepping Up: The stepping up ceremonies at both Amity Middle Schools were held on June 8, 2023 at 1:00 pm. The events were highlighted by student performances and guest speeches and was well attended by the community. A fitting farewell to our 8th Grade students and a successful sendoff to ARHS.

Trident Nets Top Honors for 2nd Year: Amity's student newspaper, *The Trident*, has been selected for the 1st place award for schools of between 1,000-1,700 students in the American Scholastic Press Association's annual student newspaper competition. This is the second year in a row that *The Trident* has been the 1st place winner. Congratulations to *The Trident's* writing and editing staff on another year of top-notch student journalism!

Schoology Update: The District Technology Committee met in May to review feedback and finalize plans for the district-wide Schoology rollout for the 2023-2024 school year. Instructional technology

coaches have been working diligently to prepare a lead group of teachers in each of the schools to lead the Schoology implementation. Initial professional development was provided to all teachers in April and May. Additional PD sessions will be provided throughout next year – including training for students and families.

Adult Education Graduation: Three Amity students were awarded their high school diplomas through the Adult Education Program at Hamden High School. A graduation ceremony was held on the evening of May 25, 2023 at Hamden High School. A reception was held immediately afterwards for friends and family members to celebrate the students' accomplishments.

Middle School Exams: Students in both middle schools started their exam period on June 6, 2023 and completed their last exam on June 9, 2023.

MusicFEST: The ARHS Music Department wrapped up its concert series for the year on May 18, 2023 with MusicFEST, a showcase of our band and chorus programs, plus several performances by individual student performers and duets.

AMSO Math League Results: The Amity Middle School Orange 8th grade students ranked 3rd out of 46 middle schools from across New England in the New England Math League contest. (NEML). Additionally, the 8th grade was ranked #1 in the Hartford, Middlesex, New Haven, Windham regions. The AMSO 7th grade was ranked 7th out of 47 middle schools from across New England and was ranked #2 in the Hartford, Middlesex, New Haven, Windham regions.

AMSO Music: Congratulations to the AMSO musicians for their outstanding performance at the High Notes Music Festival. The AMSO band and strings received a Superior rating while the choir received an Excellent rating. The feedback from the judges validated the students' hard work and will be used to inform instructional planning for next year.

Spartan Prep Vegetables: Students in the 9-12 Spartan Prep program engaged in a month's long unit focused on the growing and cultivation of vegetables/fruits that are sustainable and suitable to be grown during the summer months in New England. In addition to planting numerous fruits and vegetables in the recently refurbished garden beds outside the classroom (a special thank you to the Construction Class), the students were also able to provide staff an assortment of Brandywine Tomato, Cherry Tomato, Cucumber, Green Leaf Lettuce, Bibb Lettuce, Cabbage, and Kale mature seedlings for their personal gardens.

PTSO Teacher of the Year: Photography teacher Lisa Toto was honored as the Amity Regional High School 2023 PTSO Teacher of the Year at the Senior Awards Night ceremony on June 1, 2023.

District Data Team: This year's final meeting of the District Data Team was held this month. The Team reviewed and finalized the 3-year goals and action steps linked to the Next Generation Accountability Report. The Superintendent also provided the group with an update on the actions that were identified by the district's Attendance Committee to address chronic absenteeism. The meeting concluded with an update on the learning walk data collected throughout the year.

Resources

STEAM Day: Students in grade 5 from Bethany, Orange, and Woodbridge were invited to the high school on May 31, 2023 for the annual BOWA STEAM Day event. Students and staff from the high school held demonstrations in various locations to showcase the interesting and exciting opportunities in STEAM that elementary students will have in the future at Amity. Hundreds of students were on site for the event and feedback from the BOW schools was extremely positive. High school teachers, Angelo Amato and Jessica Zamachaj, were responsible for organizing this wonderful event.

AMSB Nature Walk to Peck Pond: On May 31, 2023, all students who were not involved in the AMSB Music Department Adjudication Festival participated in a celebration of our school year. The day included a movie, crafts, team activities, and a walk to Peck Pond Preserve. Students spent much of the day outdoors (with no electronics!), and even had a surprise visit from a local ice cream truck.

AMSB 8th Grade Field Trip Planned for Next School Year: One of the highlights of 8th grade next year is going to be a trip to New York City to participate in the "Founding Father's Tour" and a matinee performance of the Broadway play *Hamilton*. The trip is scheduled for Wednesday, October 11, 2023. Due to the trip occurring early in the school year, registration and deposits will be collected during the summer in order to secure seats and confirm the reservation.

TOT NASP PREPaRE: Amity PPS Director, Tom Brant, attended a four-day, trainers of trainers' workshop on the NASP PREPaRE Curriculum (School Safety and Crisis Preparedness) on June 5-8, 2023, at CREC in Hartford. Mr. Brant's successful completion of this TOT workshop will allow him to train staff in the NASP PREPaRE curriculum allowing the district to engage in best practices regarding schools' safety and crisis preparedness while saving significant money by not needing to bring in outside trainers.

Climate

Sondheim Nominations and Winner: Amity Creative Theater's production of *Beauty and the Beast* earned eight Sondheim Award nominations, including: Best Supporting Actress: Kacey Smith, Best Costumes: Leah Katz and Nehdi Taddipalli, Best Orchestra, Best Ensemble, Best Choreography: Andrea Kennedy, Best Actor: Jacob Ebert, and the overall Best Musical nomination. Grace Lupoli, who starred as Belle in our production of *Beauty and the Beast*, was named Best Actress at the 2023 Stephen Sondheim Awards! Grace will now move on to the National High School Musical Theater Awards (The Jimmy's) on June 26, 2023 on BROADWAY at the Minskoff Theater.

Senator Murphy Visits ARHS: On May 12, 2023, ARHS was selected by Senator Murphy's team for a roundtable discussion with a group of our students, faculty, parents, and community leaders. He was here to hear from them about the bipartisan bill he recently introduced on social media restrictions aimed at addressing teen mental health issues. In addition to the faculty on hand and the state legislators who joined us, more than 20 students stayed to talk with him on the day of the Junior Prom. Impressed by our students, the senator's staff have been in touch with some of the participants since the roundtable to get more insight into the topics addressed at the meeting.

ARHS Underclass Awards Night: The Underclass Awards Night ceremony for students in grades 9-11 was held on May 16, 2023. This year 158 Amity students were recognized at the ceremony, receiving well over 200 awards and honors.

Unified Sports Wrap-Up: Unified Sports completed a successful unified school year. Altogether, in grades 7-12 and the Amity Transition Academy, a total of 13 events were attended with our students participating with 11 other school districts. The unified experience is an essential experience for our students! Students participated in events such as basketball, track, soccer, corn hole, and volleyball. Additionally, our students in the high school participated in yearlong Unified Theater activities. We are grateful to our unified coaches and advisors for their dedication to our students.

Prom Success: The Junior Prom was held on May 12, 2023 and the Senior Prom was held on June 2, 2023.

AMSB Student of the Month: AMSB held its final student of the month breakfast on June 1, 2023 and celebrated the last group of award winners. The life arts team took on the task of starting this recognition

program this year in an effort to acknowledge hard work, kindness, and students who adhere to the Be Amity motto. We will continue this program next year and thank all of our teachers, the staff at Chartwells, and the PTSO for their support this year.

SAILS Lake Compounce Trip: Students and staff in the 7-12 SAILS programs went to Lake Compounce on May 26, 2023 to celebrate their accomplishments this school year and work on their fiscal literacy and social language skills. The students enjoyed the opportunity to see their peers from different buildings while in a more natural social environment.

AMSB Middle School Yearbook Distribution and Signing: The yearbook distribution and signing event was held after the last exam on Friday June 9, 2023 and was a great end of school event. Students and teachers took time to share memories and say goodbye as we brought closure to a great school year. Thank you to the PTSO for the ice cream treats!!

AMSO Welcomes the Class of 2029: On May 24, 2023, AMSO students and staff welcomed the incoming 7th grade from the Orange elementary schools. AMSO students gave the incoming class a tour of the building and shared important information regarding the transition to middle school.

AMSO 8th Grade Dance: The AMSO 8th grade dance, sponsored by the PTSO was held on June 2, 2023. Over 140 8th grade students attended the event at Birchwoods. Students enjoyed celebrating the end of a successful school year. Appreciation is extended to the teachers and parents who chaperoned this event and made it so successful.

Please click <u>here</u> to view the 2023 edition of Calliope, Amity Regional High School's art and literature magazine.

To see AMSB's 2023 literary magazine, please click here.

June 2023

May Ticket Summary

Tickets addressed and closed: 47

Tickets open: 4

HS Student Help Desk

Students helped: 387

Amity Regional School District No. 5

25 Newton Road

Woodbridge, CT 06525 Phone: 203-397-4817

Fax: 203-397-4864

AMITY

Amity Regional School District No. 5

Technology Department Monthly Report

Completed Projects:

- Schoology completed staff training in preparation for full implementation in the Fall of 2023
- 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.
 - Installation was completed May 11 and 12, 2023

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
 - Audio and Visual cable installation started on May 1, 2023
 - Installation of the motorized screens and equipment rack in control room will follow
- Installing Promethean Boards throughout the High School based on needs
 - 8 new boards have been delivered and will be installed this summer
- 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
- Doing a full audit of the registration process through PowerSchool to be followed by an update to address any inefficiencies in the current system
- Collection of student and staff devices has been complete
 - Devices will be updated, cleaned and prepared for distribution in the Fall during the summer

Upcoming projects:

- Worked with vendors to assess our current security camera video management system (VMS) to determine if there is a more cost effective and efficient way to operate our security camera environment district-wide
 - Identified a solution by AXIS to replace our current MileStone VMS
 - Proposed solution would replace existing system while saving costs with ongoing licensing as well as repurposing existing servers for network security log repository saving the District the cost associated with a new log server.

June 2023

CLEAN

SAFE

HEALTHY

SCHOOLS

Amity Regional School District No. 5

Facilities Department Monthly Report

Completed Projects:

- Spring preventative maintenance was done on the air handlers.
- Spring preventative maintenance and cleanings were done to the chillers and cooling tower.
- The pug mill (clay mixer/extruder) in the art room at ARHS was repaired and serviced by our in house maintainer.

Projects in Process:

- The lecture hall remodel at ARHS is approximately 50% completed. Demolition of the ceiling, seating and carpet has been completed. Rough in of the electrical, audio visual, fire suppression and HVAC have been completed, the majority of the floor has been poured, as well as the soffit. Manufacturing delays are anticipated for the seating, which will likely push back the completion date.
- All indoor lighting fixtures in AMSO and AMSB are being re-lamped with different bulbs due to problems with existing bulbs. Orange has been completed, Bethany is 35% completed.
- Woodbridge TPZ approved the installation of eight poles and lights to improve safety and security to the upper rear lot at ARHS. Facilities staff will work with UI to finalize the project and work towards a start date.
- The gym roof and wall panel project for both middle schools was approved at the Facilities Committee meeting and is awaiting board approval to commence.
- The patio replacement project for ARHS was awarded to Prindle Hill Construction and will start mid July. The curtain wall frame replacement at ARHS was awarded to Cherry Hill Glass and will start on July 10th.
- The Bethany modular classroom upgrade will start on June 19th.
- Work is set to begin at AMSO and AMSB for the State mandated HVAC assessment on June 19th.

Outstanding issues to be addressed:

Water retention on the ARHS track is still being reviewed

Amity Regional School District No. 5

25 Newton Road

Woodbridge, CT 06525 Phone: 203-397-4817

Fax: 203-397-4864



AMITY REGIONAL SCHOOL DISTRICT NO. 5

Bethany Orange Woodbridge 25 Newton Road, Woodbridge Connecticut 06525



To: Jennifer P. Byars, Superintendent of Schools

From: Theresa Lumas, Director of Finance & Administration

Date: May 22, 2023

Re: Discussion and Possible Action on Contracts over \$35,000

The Amity Finance Committee and/or Board of Education may elect to approve all projects with the following motion:

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 middle school roof projects, sidewalk repairs, and security camera video monitoring system.

Or take each project separately:

Middle School Roof Projects:

Mr. Martoni, the Director of Facilities, has been working with a State approved roof contractor to utilize the OMNIA consortium bid process and prepare the scope of the middle school gym roof projects. Mr. Martoni is recommending that we award the Amity Middle School Bethany gym roof project to Garland (subcontractors: Tech Roofing Systems and Gold Seal Roofing) as low bidder at \$397,643 for gym roof repair and gym wall system. Secondly, at Amity Middle School Orange, award the gym roof project to Garland (subcontractors: Tech Roofing Services and JHS Restoration) as low bidder at \$490,748 for gym roof repair and gym wall system.

There has been \$331,500 designated for Amity Middle School Bethany and \$382,000 designated for Amity Middle School Orange gym roof projects. The bids for the projects came in over budget and required an additional designation of funds available in the Capital Nonrecurring Account (CNR). There is \$263,267 undesignated in the CNR account. I am requesting that \$174,891 is designated to the middle gym roof projects as follows:

ITEM	ACCOUNT	TO	FROM
Amity Middle School –Bethany	00-15-0062-5715	\$ 66,143	
Amity Middle School- Orange	00-15-0063-5715	\$108,748	
Undesignated	00-15-0099-5899		\$174,891

Amity Facilities Committee:

Moved to recommend the Amity Finance Committee and the Board of Education approve on May 22, 2023

Amity Finance Committee:

Move to recommend the Amity Board of Education approve –

Amity Board of Education:

Move to approve -

... the award of contracts for the middle school roof projects to Garland, AMSB-\$397,643 and AMSO \$490,748 and the designation of additional funds for roof repairs and gym wall system and the transfer to cover the additional funds.

Sidewalk Repairs - ARHS:

The Board approved in May to consolidate the concrete repair funds into the high school account to address the deteriorating walks around the school. Mr. Martoni obtained a quote of \$43,000 to do one portion of the sidewalk. Before preparing the bid, he also obtained a quote from Prindle Hill Construction to do the same area. It was significantly less since they can do the work in conjunction with the patio project previously award and have one concrete pour. We would like to expend the full \$39,000 allotted to concrete repair by expanding the scope of work to include more sections of sidewalk around the high school. It makes sense to contract with Prindle Hill Construction to minimize the cost of staging the concrete pour. We are getting estimates for additional areas of repair and the final amount will be presented at the meeting. This does require waiving the bid process.

Amity Finance Committee:

Move to recommend the Amity Board of Education approve -

Amity Board of Education:

Move to approve -

... waiving the bid process and awarding the contract for the sidewalk repairs to Prindle Hill Construction of Orange, CT for \$XX,XXX to repair the sidewalks in front, side and rear of Amity Regional High School and waive the bid process.

Security:

1. Security Camera Software

This contract award is to purchase a new security camera software monitoring system. We have been looking for the past couple of years to replace Milestone VMS with a new provider with better terms and functionality. We are adding a number of security cameras to our facilities and it is more cost effective to do this with a new provider, AXIS. Last month, the Boards approved the purchase of additional cameras. We are also adding cameras in the serving areas of the cafeterias. The expansion of our camera network warrants switching to monitoring services now. We are planning to purchase the system off consortium bid pricing with Whalley Computer Associates, Inc. Some of the funds for the licenses are budgeted in the technology line, \$14,565, Open Choice funds can support \$10,724, and there is a transfer in the packet for \$18,896 to cover the remainder of the equipment costs.

Motions:

For the Amity Finance Committee:

Recommend the Amity Board of Education approve...

For the Amity Board of Education:

Move to approve...

...the purchase of a security camera software from Whalley Computer Associates for \$44,185.00

AMITY REGIONAL SCHOOL DISTRICT NO. 5

Bethany Orange Woodbridge 25 Newton Road, Woodbridge Connecticut 06525



Kathleen Kovalik
Assistant Director of Finance and Administration
kathleen.kovalik@amityregion5.org

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

To: Dr. Jennifer P Byars, Superintendent of Schools

From: Kathleen Kovalik, Assistant Director of Finance and Administration

cc: Theresa Lumas, Director of Finance and Administration

Re: Tuition Rate 2023-2024

Date: June 1, 2023

I am recommending the tuition rate for the 2023-2024 school year be set at \$21,058 for non-resident students. This tuition increase represents a 4.55% increase or \$916.00 above the current tuition rate of \$20,142.00. In the current school year there were seven non-resident students enrolled, including three children of staff members. Two students graduated in June 2023. The 2023-2024 budget includes revenue from five tuition students, three discounted. The non-resident tuition rate is calculated using the State Department of Education Net Current Expenditure per Pupil formula indexed for 2023-2024.

I am also proposing the following rate for non-resident tuition students identified as special education and placed at Amity Regional School District by another public school district through an IEP. The base rate is \$21,817.00. This is derived from the Net Current Expenditure Per Pupil indexed for the 2023-2024 school year. Additional services required by a student's Individual Education Plan (IEP) will be added to the base tuition rate. These services are billed based on the actual costs the District incurs.

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

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

Behaviorist (BCBA) - \$150/hr. Speech/Language - \$70/hr. Assistive Technology - \$175/hr. Occupational/Physical Therapy - \$99/hr. Hearing direct services - \$255/hr. Hearing Consults - \$285/hr. Counseling (SW/Psych) - \$66/hr. Behavioral Therapist - \$55/hr.

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

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

Amity Finance Committee:

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

Board of Education:

Move to approve...

... the non-resident tuition rate for 2023-2024 school year at \$21,058; and the the non-resident Special Education base tuition rate for 2023-2024 school year at \$21,817.00 plus any additional services

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2021-2022	2022-2023	APR 23	CHANGE	45,069	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
1	MEMBER TOWN ALLOCATIONS	50,495,238	52,349,608	52,349,608	0	52,349,608	0	FAV
2	OTHER REVENUE	130,512	114,296	256,231	4,167	260,398	146,102	FAV
3	OTHER STATE GRANTS	843,114	844,861	550,251	0	550,251	(294,610)	UNF
4	MISCELLANEOUS INCOME	45,809	41,040	41,987	4,860	46,847	5,807	FAV
5	BUILDING RENOVATION GRANTS	0	0	0	0	0	0	FAV
6	TOTAL REVENUES	51,514,673	53,349,805	53,198,077	9,027	53,207,104	(142,701)	UNF
7	SALARIES	27,429,917	28,830,023	28,289,679	6,500	28,296,179	(533,844)	FAV
8	BENEFITS	5,464,945	6,046,203	5,854,000	164,067	6,018,067	(28,136)	FAV
9	PURCHASED SERVICES	8,856,448	10,234,922	9,306,703	(208,457)	9,098,246	(1,136,676)	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	3,060,487	(36,500)	3,023,987	(133,944)	FAV
12	EQUIPMENT	130,142	86,552	193,906	46,100	240,006	153,454	UNF
13	IMPROVEMENTS / CONTINGENCY	340,143	308,000	162,475	0	162,475	(145,525)	FAV
14	DUES AND FEES	121,969	200,458	188,071	(23,200)	164,871	(35,587)	FAV
15	TRANSFER ACCOUNT	929,175	0	1,066,995	0	1,066,995	1,066,995	UNF
16	TOTAL EXPENDITURES	50,886,213	53,349,805	52,608,032	(51,490)	52,556,542	(793,263)	FAV
17	SUBTOTAL	628,466	0	590,045	60,517	650,562	650,562	FAV
18	PLUS: CANCELLATION OF PRIOR YEAR'S ENCUMBRANCES	83,471	0	0	0	0	0	FAV
19	DESIGNATED FOR SUBSEQUENT YEAR'S BUDGET:	0	0	0	0	0	0	FAV
20	NET BALANCE / (DEFICIT)	711,937	0	590,045	60,517	650,562	650,562	FAV

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2021-2022	2022-2023	APR 23	CHANGE	45,069	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
1	BETHANY ALLOCATION	8,983,609	8,918,279	8,918,279	0	8,918,279	0	FAV
2	ORANGE ALLOCATION	25,236,005	26,367,974	26,367,974	0	26,367,974	0	FAV
3	WOODBRIDGE ALLOCATION	16,275,624	17,063,355	17,063,355	0	17,063,355	0	FAV
4	MEMBER TOWN ALLOCATIONS	50,495,238	52,349,608	52,349,608	0	52,349,608	0	FAV
6	ADULT EDUCATION	4,341	4,000	4,754	0	4,754	754	FAV
7	PARKING INCOME	31,146	32,400	30,975	168	31,143	(1,257)	UNF
8	INVESTMENT INCOME	4,975	5,000	85,000	(1,727)	83,273	78,273	FAV
9	ATHLETICS	26,516	24,000	28,000	5,726	33,726	9,726	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	OTHER REVENUE	130,512	114,296	256,231	4,167	260,398	146,102	FAV
14	OTHER STATE GRANT	0	0	0	0	0	0	FAV
15	SPECIAL EDUCATION GRANTS	843,114	844,861	550,251	0	550,251	(294,610)	UNF
16	OTHER STATE GRANTS	843,114	844,861	550,251	0	550,251	(294,610)	UNF
17	RENTAL INCOME	23,158	18,000	26,115	4,860	30,975	12,975	FAV
18	INTERGOVERNMENTAL REVENUE	4,893	5,040	1,872	0	1,872	(3,168)	UNF
19	OTHER REVENUE	17,758	18,000	14,000	0	14,000	(4,000)	UNF
20	TRANSFER IN	0	0	0	0	0	0	FAV
21	MISCELLANEOUS INCOME	45,809	41,040	41,987	4,860	46,847	5,807	FAV
22	BUILDING RENOVATION GRANTS	0	0	0	0	0	0	FAV
23	TOTAL REVENUES	51,514,673	53,349,805	53,198,077	9,027	53,207,104	(142,701)	UNF

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2021-2022	2022-2023	APR 23	CHANGE	45,069	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
_	EALA OEDTIFIED ON ADIFO	00 450 405	00.047.400	00 047 074	0.100	00 000 074	(400,004)	E 43.7
1	5111-CERTIFIED SALARIES	22,456,125	23,647,192	23,217,371	6,500	23,223,871	(423,321)	FAV
2	5112-CLASSIFIED SALARIES	4,973,792	5,182,831	5,072,308	0	5,072,308	(110,523)	FAV
3	SALARIES	27,429,917	28,830,023	28,289,679	6,500	28,296,179	(533,844)	FAV
4	5200-MEDICARE - ER	381,832	423,336	423,336	(25,000)	398,336	(25,000)	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	3,718,260	180,000	3,898,260	(120,000)	FAV
8	5860-OPEB TRUST	0	155,474	267,232	0	267,232	111,758	UNF
9	5260-LIFE INSURANCE	46,418	55,110	59,735	(125)	59,610	4,500	UNF
10	5275-DISABILITY INSURANCE	10,736	11,757	12,873	(8)	12,865	1,108	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	10,000	163,143	10,000	UNF
12	5282-RETIREMENT SICK LEAVE - CERT	0	0	0	0	0	0	FAV
13	5283-RETIREMENT SICK LEAVE - CLASS	0	0	0	0	0	0	FAV
14	5284-SEVERANCE PAY - CERTIFIED	0	0	0	0	0	0	FAV
15	5290-UNEMPLOYMENT COMPENSATION	12,498	10,500	31,245	0	31,245	20,745	UNF
16	5291-CLOTHING ALLOWANCE	1,459	2,200	2,200	(800)	1,400	(800)	FAV
17	BENEFITS	5,464,945	6,046,203	5,854,000	164,067	6,018,067	(28,136)	FAV
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	2,214	133,292	2,214	UNF
20	5330-PROFESSIONAL & TECHNICAL SRVC	1,853,092	2,063,594	2,501,327	(55,000)	2,446,327	382,733	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	3,657,396	(56,788)	3,600,608	(333,326)	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	2,359,360	(78,883)	2,280,477	(1,214,723)	FAV
26	5590-OTHER PURCHASED SERVICES	78,437	91,192	91,192	(20,000)	71,192	(20,000)	FAV
27	PURCHASED SERVICES	8,856,448	10,234,922	9,306,703	(208,457)	9,098,246	(1,136,676)	FAV

Column 7: FAV=Favorable Variance

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2021-2022	2022-2023	APR 23	CHANGE	45,069	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
28	5830-INTEREST	788,835	788,835	788,835	0	788,835	0	FAV
29	5910-REDEMPTION OF PRINCIPAL	3,665,000	3,696,881	3,696,881	0	3,696,881	0	FAV
30	DEBT SERVICE	4,453,835	4,485,716	4,485,716	0	4,485,716	0	FAV
31	5410-UTILITIES, EXCLUDING HEAT	588,882	709,704	594,704	0	594,704	(115,000)	FAV
32	5420-REPAIRS, MAINTENANCE & CLEANING	943,020	731,680	731,680	0	731,680	0	FAV
33	5611-INSTRUCTIONAL SUPPLIES	328,840	366,812	365,392	(18,000)	347,392	(19,420)	FAV
34	5613-MAINTENANCE/CUSTODIAL SUPPLIES	189,616	225,305	218,246	0	218,246	(7,059)	FAV
35	5620-OIL USED FOR HEATING	40,302	47,500	47,500	1,500	49,000	1,500	UNF
36	5621-NATURAL GAS	73,394	69,941	96,941	0	96,941	27,000	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	(20,000)	233,790	(7,281)	FAV
41	5695-OTHER SUPPLIES-TECHNOLOGY	0	446,510	437,660	0	437,660	(8,850)	FAV
42	SUPPLIES (INCLUDING UTILITIES)	3,159,639	3,157,931	3,060,487	(36,500)	3,023,987	(133,944)	FAV
43	5730-EQUIPMENT - NEW	92,453	13,012	13,012	27,204	40,216	27,204	UNF
44	5731-EQUIPMENT - REPLACEMENT	37,689	5,980	113,334	0	113,334	107,354	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	18,896	22,496	18,896	UNF
47	EQUIPMENT	130,142	86,552	193,906	46,100	240,006	153,454	UNF
48	5715-IMPROVEMENTS TO BUILDING	67,775	19,000	123,475	0	123,475	104,475	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	(150,000)	0	(150,000)	(150,000)	FAV
50c	IMPROVEMENTS / CONTINGENCY	340,143	308,000	162,475	0	162,475	(145,525)	FAV

Column 7: FAV=Favorable Variance

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2021-2022	2022-2023	APR 23	CHANGE	45,069	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
51	5580-STAFF TRAVEL	8,203	21,700	18,800	(2,200)	16,600	(5,100)	FAV
52	5581-TRAVEL - CONFERENCES	32,992	70,475	75,988	(18,000)	57,988	(12,487)	FAV
53	5810-DUES & FEES	80,774	108,283	93,283	(3,000)	90,283	(18,000)	FAV
54	DUES AND FEES	121,969	200,458	188,071	(23,200)	164,871	(35,587)	FAV
55	5856-TRANSFER ACCOUNT	929,175	0	1,066,995	0	1,066,995	1,066,995	UNF
55a	ESTIMATED UNSPENT BUDGETS		0	0	0	0	0	FAV
56	TOTAL EXPENDITURES	50,886,213	53,349,805	52,608,032	(51,490)	52,556,542	(793,263)	FAV
56 Note:	RESTRICTED - CARRY OVER FUNDS/RETURN TO TOWNS	711,937						

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



MAY 2023

2022-2023 FORECAST

OVERVIEW

The projected unspent fund balance for this fiscal year is \$650,562 FAV previously \$590,045 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 is shown on line 55 of the Excel file. 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 \$142,701, UNF, previously \$151,728 UNF, which appears on page 2, column 6, line 23.

LINE 6 on Page 2: ADULT EDUCATION:

The forecast is based on actual State payments. The forecast is \$754 FAV, previously neutral.

LINE 7 on Page 2: PARKING INCOME:

The forecast is based on the budget developed on actual payments. *The forecast is \$1,257 UNF previously \$1,425 UNF*.

LINE 8 on Page 2: INVESTMENT INCOME:

The forecast is based on the budget developed. *The forecast is \$78,273 FAV, previously \$80,000 FAV.*

St	ate Treasurer's
Month M&T Bank In	vestment Fund
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%
March 2023	.400%	4.71%
April 2023	.400%	4.90%
May 2023	.400%	5.19%

LINE 9 on Page 2: ATHLETICS:

The forecast is based on the budget developed on historical payments. The forecast is \$9,726 FAV based on actual receipts, previously \$4,000 FAV.

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 \$294,610 UNF previously \$84,316 UNF. The State increased the reimbursement rate to 85% under an emergency certification action in late February. March forecast reported reflected the most recent data filed on March 1 with the new reimbursement rate applied. The State has published the May payments amounts and reduced the 85% reimbursement down to 73% and made a prior year adjustment. The change in reimbursement percentage also impacts next year's budget.

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 \$12,975 FAV, previously \$8,000 FAV.*

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 \$3,168 UNF 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 \$4,000 UNF, previously neutral.

EXPENDITURES BY CATEGORY

The projected yearend balance of expenditures is \$793,263 FAV, previously, \$741,773 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 \$423,321 FAV, previously, \$429,821 FAV. Unpaid leaves of absences (\$55,260), unfilled positions (\$252,069) and vacancy during staff turnover (\$161,941). This is partially offset by a significant increase in teacher coverages (\$115,675) 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 \$110,523 FAV, previously \$84,875 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 estimated at \$25,000 FAV as a lower than budgeted payroll is taxed.

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 <u>one</u> 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 94.1% of budget. It is important to note that if we were fully staffed it is likely our claims would be overbudget. The forecast reflects a \$120,000 FAV variance, previously \$300,000 FAV variance.

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

	2022-2023		2022-2023			2	2021-2022	2020-2021	
MONTH	ACTUAL		BUDGET	VARIANCE		ACTUAL		ACTUAL	
JUL*	\$	34,837	\$ 416,087	\$	(381,250)	\$	530,877	\$	256,509
AUG	\$\$	798,616	\$ 402,727	\$	395,889	\$	405,635	\$	200,490
SEP	\$	551,212	\$ 384,095	\$	167,117	\$	364,327	\$	292,575
OCT	\$	297,594	\$ 375,480	\$	(77,886)	\$	341,109	\$	293,360
NOV	\$\$	306,068	\$ 458,947	\$	(152,879)	\$	324,557	\$	409,279
DEC	\$	435,108	\$ 566,109	\$	(131,001)	\$	767,843	\$	489,999
JAN	\$\$	311,328	\$ 353,446	\$	(42,118)	\$	320,277	\$	253,077
FEB	\$	190,062	\$ 273,133	\$	(83,071)	\$	176,127	\$	259,775
MAR	\$	313,582	\$ 354,451	\$	(40,869)	\$	263,761	\$	255,965
APR	\$	222,547	\$ 323,033	\$	(100,486)	\$	328,046	\$	304,485
MA Y	\$	486,004	\$ 305,994	\$	180,010	\$	183,944	\$	235,252
JUN	\$	328,580	\$ 328,580	\$	-	\$	371,250	\$	274,741
TOTALS	\$	4,275,538	\$ 4,542,083	\$	(266,545)	\$	4,377,753	\$	3,525,507

ACTUAL/FORECAST CLAIMS AS A PERCENTAGE OF EXPECTED CLAIMS

2018-2019	2019-2020	2020-2021	2021-2022	2022-2023
ACTUAL	ACTUAL	ACTUAL	ACTUAL	FORECAST
92.2%	84.1%	75.8%	97.3%	94.1%

^{*}Incomplete billing cycle

FEES OF CURRENT EMPLOYEES AND RETIREES

(Stop-Loss Premiums, Network Access Fees, and Other Fees)

	20	2022-2023		2022-2023		,	20	021-2022	2020-2021	
MONTH	A	CTUAL	BUDGET		VARIANCE		ACTUAL		ACTUAL	
JUL	\$	30	\$	49,997	\$	(49,967)	\$	14,068	\$	53,562
AUG	\$	83,030	\$	53,423	\$	29,607	\$	74,642	\$	50,187
SEP	\$	61,858	\$	45,088	\$	16,770	\$	46,923	\$	53,804
OCT	\$	47,063	\$	51,048	\$	(3,985)	\$	47,049	\$	55,100
NOV	\$	50,445	\$	42,200	\$	8,245	\$	39,556	\$	56,242
DEC	\$	52,888	\$	39,812	\$	13,076	\$	51,770	\$	55,608
JAN	\$	25,978	\$	36,118	\$	(10,140)	\$	48,349	\$	11,403
FEB	\$	46,388	\$	44,037	\$	2,351	\$	81,821	\$	94,489
MAR	\$	74,389	\$	38,241	\$	36,148	\$	34,780	\$	80,240
APR	\$	43,145	\$	38,834	\$	4,311	\$	37,237	\$	54,687
MA Y	\$	47,499	\$	40,369	\$	7,130	\$	41,664	\$	59,398
JUN	\$	36,858	\$	36,858	\$	-	\$	44,118	\$	50,341
TOTALS	\$	569,571	\$	516,024	\$	53,547	\$	561,977	\$	675,061

LINE 8 on Page 3: 5860-OPEB TRUST:

The forecast reflects making the full Actuarial Determined Employer Contribution (ADEC) that was developed for the current budget. \$111,758 was cut during the FY23 budget deliberations in order to reduce the budget increase. Fully funding the ADEC will help lower future budget costs and reflects positively on the District's bond rating. If funds are available, the budget transfer was approved in May 2023. \$111,758 UNF.

LINE 9 on Page 3: 5260-LIFE INSURANCE:

The forecast is based on premiums for current staff, \$4,500 UNF, previously \$4,625 UNF.

LINE 10 on Page 3: 5275-DISABILITY INSURANCE:

The forecast is based is \$1,108 UNF previously, \$1,116 UNF based on current staff.

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

The forecast is on actual costs estimated through the final payroll, \$10,000 UNF.

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 \$20,745 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 behavorial support services for students, \$382,733 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. Additional transfers were approved in March for contract services to meet special education student needs, \$50,080 UNF. A transfer was approved in March to cover special education professional development conferences, \$6,200 UNF. Legal, consulting, and intern services are lower than budgeted, \$55,000 FAV.

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. The change month-to-month reflects students who exited programs early and lower than budgeted expenses for some students. Net to date, the transportation accounts are \$333,326 FAV, previously, \$276,538 FAV.

<u>LINE 23 on Page 3: 5521-GENERAL LIABILITY INSURANCE:</u> 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 \$1,214,723 FAV, previously, \$1,135,840 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 \$20,409 FAV, previously \$20,409 FAV.

3	FY18-19	FY19-20	FY18-19 FY19-20 FY20-21 FY21-22 FY22-23 FY						
	ACTUAL	ACTUAL	ACTUAL	ACTUAL	BUDGET	FORECAST			
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						2 (2)			
Tech	0	0	0	0	0	0(0)			
Engineering									
Science						_			
Magnet	1	0	0	0	0	0			
Highville									
Charter			0	0	0	0			
School	1	0			10	(2.0) 2.0			
Totals	16	15	16	15	18	(20) 20			

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

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

Public (ACES) and private out-of-district placements are \$1,196,126 FAV, previously \$1,117,243 FAV.

	FY18-19 ACTUAL	FY19-20 ACTUAL	FY20-21 ACTUAL	FY21-22 ACTUAL	FY22-23 BUDGET	FY22-23 FORECAST
Public						
SPED	11	8	6	10	12	9(9)
Private						
SPED	22	18	27	20	24	16(20)
Totals	33	26	33	30	36	25(29)

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

The forecast projected to be \$20,000 FAV.

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 \$115,000 FAV, previously neutral. The delivery charges year-to-date have been less than budgeted and usage is down. The air conditioning is still not required this year due to cooler than average temperatures. Replacing many air handlers over the past several years with more efficient models, (i.e. VFD driven instead of belt driven), switching cooling system for the server area, fewer computer labs and desktop computers replaced with laptops are all factors having a positive impact on usage. A budget transfer of \$24,540 is requested to cover the cost of refurbishing the modular at AMSB, account net \$90,460 FAV.

The budget assumed there would not be a Load Shed credit, and there was \$2,130 FAV.

The budget for propane is \$3,546. The forecast is projected to be \$1,000 FAV, previously neutral.

The budget for water is \$57,350. The forecast is projected to be \$7,800 FAV, previously neutral.

Sewer costs are budgeted at \$25,000. The forecast is projected to be \$7,000 previously, neutral.

ELECTRICITY (KILOWATT HOURS)

MONTH	2022-2023 FORECAST	2022-2023 BUDGET	VARIANCE	2021-2022 ACTUAL	2020-2021 ACTUAL
JUL	325,263	263,361	61,902	296,292	254,686
AUG	350,459	292,763	57,696	321,023	299,439
SEP	294,292	313,930	(19,638)	314,756	285,993
OCT	252,949	295,084	(42,135)	272,755	248,089
NOV	252,160	269,094	(16,934)	256,208	238,583
DEC	245,784	274,129	(28,345)	259,994	240,912
JAN	262,051	283,552	(21,501)	257,539	249,595
FEB	259,362	280,114	(20,752)	271,979	243,774
MAR	249,254	263,718	(14,464)	255,631	246,886
APR	249,963	274,727	(24,764)	255,629	254,711
MAY	252,686	252,686	-	277,953	244,685
JUN	246,843	246,843	-	296,900	290,054
Totals	3,241,066	3,310,001	(68,935)	3,336,659	3,097,407

DEGREE DAYS

There are 4,152 degree days to date as opposed to 4,888 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 neutral, previously \$12,719 FAV. Additional tree trimming and/or removal is required at all 3 campuses.

<u>LINE 33 on Page 4: 5611-INSTRUCTIONAL SUPPLIES:</u> The forecast is projected to be under budget, \$19,420 FAV over all 80 accounts.

LINE 34 on Page 4: 5613-MAINTENANCE SUPPLIES: The forecast is projected to be under budget, \$7,059 FAV. A transfer is requested this month to cover the cost of replacing one of the auto shop lifts. *The forecast is projected to be \$7,059 FAV, previously neutral.*

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

The budget for natural gas is \$68,171 and the budget for oil is \$41,000. The forecast is projected to be over budget based on year to date costs, \$28,500 UNF, previously \$27,000 UNF.

LINE 40 on Page 4: 5690 OTHER SUPPLIES:

Classroom and interior office door windows should be covered during a lockdown. Mr. Martoni researched products that are UL rated, 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 \$7,281 FAV previously \$12,719 UNF*.

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

The forecast is projected to be \$27,204 UNF to purchase a new ride-on burnisher. A transfer is requested this month. The account was previously forecasted to be neutral.

LINE 44 on Page 4: 5731-EOUIPMENT -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 \$107,354 UNF**, **previously \$107,354 UNF**. A transfer was approved in December for robotics equipment. A transfer was approved in March to cover the cost of a lift replacement, \$7,059 UNF. A transfer was approved in May for \$57,177 from contingency to replace security cameras. We have applied for a grant to reimburse this purchase but we must secure the funds in order to be eligible. It is necessary to replace the cameras because they are outdated and the footage is of poor quality.

LINE 46 on Page 4: 5730-EQUIPMENT -TECHNOLOGY-REPLACEMENT:

The forecast is projected to be \$18,896 UNF to purchase a new video monitoring system for our security cameras. Our current system is more costly and cumbersome to add cameras into the system. A transfer is requested this month. The account was previously forecasted to be neutral.

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. A transfer was approved in May \$48,769 for security cameras. The cameras are not in the FY23-24 budget and we have applied for a grant to get reimbursed for this purchase. The balance of contingency is requested for refurbishing the modular at AMSB. If both transfers are approved, **the balance in contingency will be zero**, previously \$57,769 FAV.

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

A transfer was approved in March for special education conference, \$6,200 UNF. The account is \$17,587 FAV as staff travel to conferences is just beginning to return to pre-COVID levels. Many conferences were still held virtual but we have seen an increase in both in-person offerings and staff willingness to attend in-person, previously, \$2,613 UNF.

LINES 53 on Page 5: 5810 – DUES & FEES:

The forecast estimates these accounts will be \$18,000 FAV, previously \$15,000.

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. The forecast reflects the maximum amount the District will request in August for capital projects, \$1,066,995.

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. \$711,937 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 \$711,937 in March 2023.

APPENDIX A

COST SAVINGS AND EFFICIENCIES FOR FISCAL YEAR 2022-2023

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.

<u>\$18,446 E-Rate Credits</u>: 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-committe
- District recognized CQIA Innovation Prize for Fostering a District Culture of Maximizing Cost Savings and Efficiencies http://www.amityregion5.org/boe/sub-committees/finance-committee2
- Fiscal Year 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. <u>It is only as good as the</u> 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).

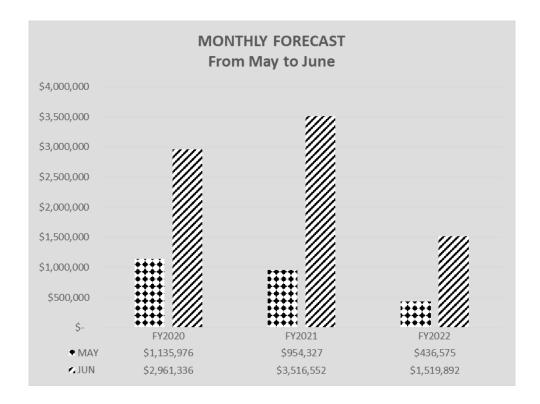
Revenues can be most impacted by decisions made at the State level for Special Education and Transportation grants. We have seen the reimbursement rate change in mid-year.

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, gradutation and stepping up costs, and athletic rentals were less due to the social distancing requirements.
- \$76,091: Transportation and fuel costs for busses were lower due to the COVID-19 global pandemic. Contracts were renegotiated in May but with school cancellation final for the year, additional savings resulted. There were no late runs, athletic trips, or field trips at the end of the year.
- \$70,483: Instructional supplies were lower due to the COVID-19 global pandemic. Consumable materials could not be utilized in the remote learning environment so there was a significant decrease in food for culinary, lumber and other raw materials for technology education and science lab materials.
- \$54,739: Communication costs were lower due to the COVID-19 global pandemic. Less postage, copy paper, and catering needs due to the remote learning environment.
- \$35,521: Rentals for fields, tables, chairs, tents, etc. were lower due to the COVID-19 global pandemic. End of year athletic contests were cancelled and ceremonies were done in a socially distance manner which eliminated the need for many items used for large crowd gatherings.
- \$14,945: Electricity usage was lower due to the COVID-19 global pandemic. Buildings had a few occupants during the March through June timeframe.

FY2021:

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

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

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

SPECIAL EDUCATION:

\$ 580,502

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

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

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

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

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

\$228,156 TRANSPORTATION SERVICES: (OTHER): School busses did not transport students for daily runs, late runs, athletic events or extra-curricular 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.

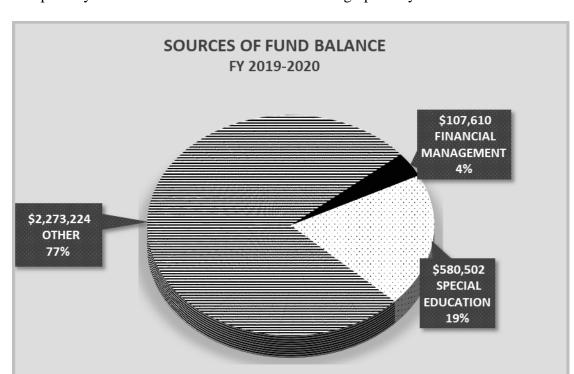
\$82,664 PURCHASED SERVICES (OTHER): Purchased services costs were lower due to several factors. Cancellation of spring sports resulted in fewer athletic contests and fewer officials, monitors, and scorekeepers, \$32,000 FAV; \$26,000 FAV was saved for contracted services changes with a less expensive 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.

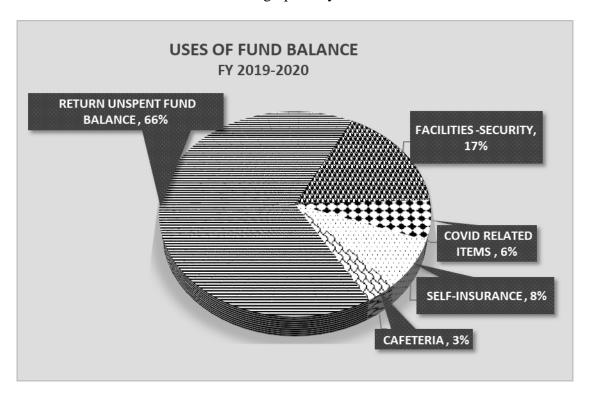
\$515,077 END OF YEAR PURCHASES (EOY):

\$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:

0,777
0,371
2,321
8,085
3,08

APPENDIX D

RECAP OF 2020-2021

Return Unspent Fund Balance:

The cancellation of 2019-2020 encumbrances of \$352,364 will be returned to the Member Towns. We encumber funds for goods and services received by June 30th but not yet billed. The final quarter of FY20 was a period of shut down making it difficult to determine the need for open orders and there was a substantial amount of unemployment claims in dispute. In some cases, the estimated amount encumbered varies from the actual invoice (e.g., utility bill; water bill, pending special education settlements) and we do not need to spend the entire encumbrance. Once the audit is final for 2020-21, the funds will be returned.

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

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.

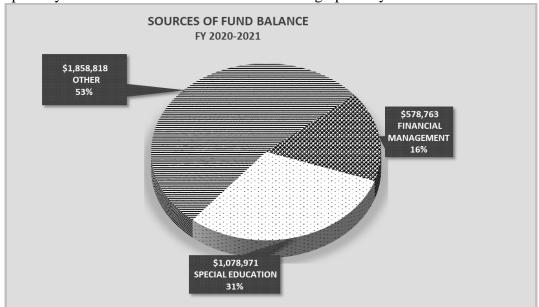
\$192,377 SUPPLIES: Instructional supplies and maintenance supplies were under budget. The teaching staff adjusted purchases for remote and hybrid learning. \$96,980 was reimbursed through grants.

\$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.

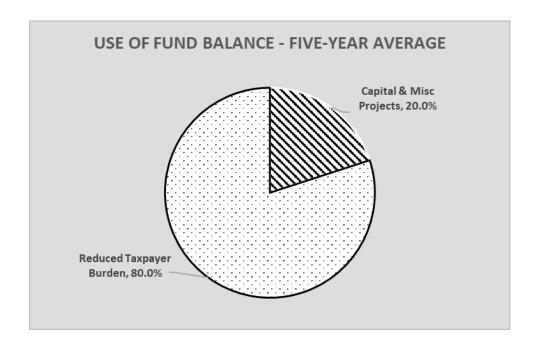


The primary sources of the fund balance are shown graphically below:

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:

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

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 30th but not yet billed. In some cases, the estimated amount encumbered varies from the actual invoice (e.g., utility bill; water bill, pending special education settlements) and we do not need to spend the entire encumbrance.

The 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.

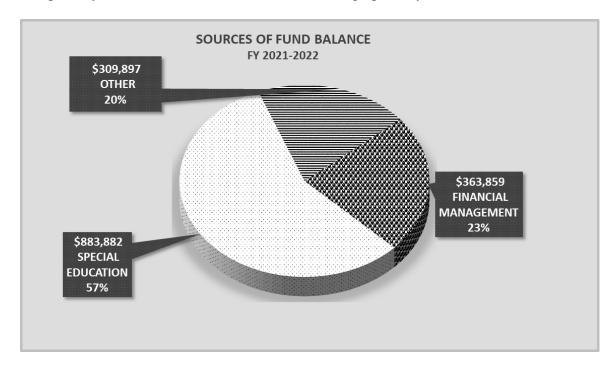
\$18,429 PURCHASED SERVICES (OTHER): Other purchased services accounts were under budget collectively by \$8,666 due to less printed materials and catered events. Data processing was under budget by \$9,763 as the administration consolidated onboarding software options at a reduced cost.

\$57,082 SUPPLIES (OTHER): Instructional supplies and transportation fuel were under budget. Purchases for consumables was less than budgeted. Repairs and maintenance were over budget but offset by utilities and maintenance supplies which were under budget. 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..

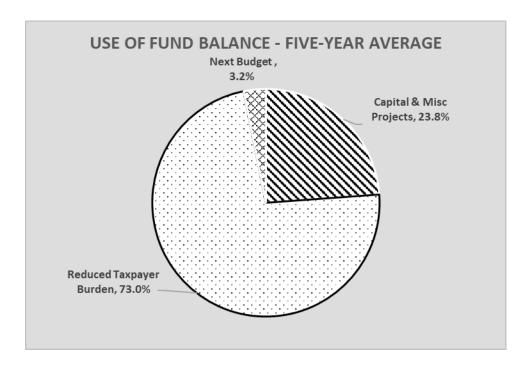
The primary sources of the fund balance are shown graphically below:



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 subtracted from the Towns' March 2023 allocation payments.

		District No. 5 - Budget Transfers 2022-2023		401111	DECODIFICAL
MONTH/YR JUL	JNL#	ACCOUNT NUMBER & DESCRIPTION	An	MOUNT	DESCRIPTION
NO FUND- 1	ENTRIES				
AUGUST	LIVITALO				
NO FUND- 1	I ENTRIES	3			
SEPTEMBE					
Sep-22	17	03-14-2600-5613 MAINTENANCE/CUSTODIAL SUPPLIES	\$	(2,850.00)	guards supplies
Sep-22	17	05-14-2600-5730 EQUIPMENT - NEW	\$		guards supplies
Sep-22	43	05-14-2660-5730 EQUIPMENT - NEW	\$		Corr. JE 2023-03-17 Guard Supp
Sep-22	43	05-14-2600-5730 EQUIPMENT - NEW	\$		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	\$		CLC Membership Dues
Sep-22	104	01-13-2220-5810 DUES & FEES	\$		CLC Membership Dues
Sep-22	120	02-11-1013-5611 INSTRUCTIONAL SUPPLIES	\$		LICENSE FOR GIZMOS SCIENCE DEP
Sep-22	120	02-14-2350-5695 TECHNOLOGY SUPPLIES	\$		LICENSE FOR GIZMOS SCIENCE DEP
Sep-22	134	01-11-1010-5330 OTHER PROFESSIONAL & TECH SRVC	\$		Concert Supplies
Sep-22	134	01-11-1010-5611 INSTRUCTIONAL SUPPLIES	\$		Concert Supplies
Sep-22	150	02-13-2220-5330 OTHER PROFESSIONAL & TECH SRVC	\$		books for kindles/read wrkshop
Sep-22	150	02-13-2220-5642 LIBRARY BOOKS & PERIODICALS	\$		books for kindles/read wrkshop
Sep-22	157	03-11-1017-5330 OTHER PROFESSIONAL & TECH SRVC	\$		for standing desk
Sep-22	157	03-11-1017-5611 INSTRUCTIONAL SUPPLIES	\$	179.00	for standing desk
OCTOBER					
Oct-22	22	01-11-1013-5611 INSTRUCTIONAL SUPPLIES	\$		Renew Gizmos Science License
Oct-22	22	01-14-2350-5695 TECHNOLOGY SUPPLIES	\$,	Renew Gizmos Science License
Oct-22	39	02-11-1009-5611 INSTRUCTIONAL SUPPLIES	\$		DELTAMATH PLUS LICENSE
Oct-22	39	02-14-2350-5695 TECHNOLOGY SUPPLIES	\$		DELTAMATH PLUS LICENSE
Oct-22	41	01-11-1009-5611 INSTRUCTIONAL SUPPLIES	\$, ,	ITEM PRICE INCREASE
Oct-22	41	01-11-1009-5810 DUES & FEES	\$		ITEM PRICE INCREASE
Oct-22	69 69	03-14-2600-5420 REPAIRS,MAINTENANCE & CLEANING	\$		EAGLE LEASING TRAILER INCREASE EAGLE LEASING TRAILER INCREASE
Oct-22 Oct-22	73	03-14-2600-5440 RENTALS-LAND,BLDG,EQUIPMENT 01-11-1005-5330 OTHER PROFESSIONAL & TECH SRVC	\$ \$		Purchase English Dept Supplies
Oct-22	73 73	01-11-1005-5550 OTTIEN PROPESSIONAL & TECHTSRVC	\$ \$		Purchase English Dept Supplies Purchase English Dept Supplies
Oct-22	73 74	01-11-1008-5611 INSTRUCTIONAL SUPPLIES	\$		CTE Conference Membership
Oct-22	74	01-11-1008-5810 DUES & FEES	\$		CTE Conference Membership
Oct-22	80	04-12-6110-5510 PUPIL TRANSPORTATION	\$		Transportation for Platt Tech
Oct-22	80	05-14-2700-5512 VO-AG/VO-TECH REG ED	\$		Transportation for Platt Tech
Oct-22	130	02-11-1008-5420 REPAIRS, MAINTENANCE & CLEANING	\$		CONFERENCE
Oct-22	130	02-11-1008-5810 DUES & FEES	\$		CONFERENCE
Oct-22	135	04-12-2151-5330 OTHER PROFESSIONAL & TECH SRVC	\$		REIMBURSEMENT ZOOM
Oct-22	135	04-13-2190-5690 OTHER SUPPLIES	\$		REIMBURSEMENT ZOOM
Oct-22	157	05-13-2212-5810 DUES & FEES	\$		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
NOVEMBER	?				
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
DECEMBER					
Dec-22	56	02-13-2220-5690 OTHER SUPPLIES	\$	` ,	Books for media center
Dec-22	56	02-13-2220-5642 LIBRARY BOOKS & PERIODICALS	\$		Books for media center
Dec-22 Dec-22	60 60	01-11-1008-5611 INSTRUCTIONAL SUPPLIES 01-14-2350-5695 TECHNOLOGY SUPPLIES	\$ \$		LIFE ARTS SOFTWARE PURCHASE LIFE ARTS SOFTWARE PURCHASE
Dec-22 Dec-22	81	05-14-2350-5695 TECHNOLOGY SUPPLIES	Ф \$		PROMETHEAN BOARD SHIPPING
Dec-22	81	05-14-2350-5732 EQUIPMENT-TECHNOLOGY-NEW	\$,	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	\$		COVER S/H
Dec-22	111	05-14-2350-5695 TECHNOLOGY SUPPLIES	\$, ,	cover s/h
Dec-22 Dec-23	111 113	05-14-2350-5732 EQUIPMENT-TECHNOLOGY-NEW	\$ \$		cover s/h PD Supplies
Dec-23	113	05-13-2213-5111 CERTIFIED SALARIES 05-13-2213-5590 OTHER PURCHASED SERVICES	\$		PD Supplies PD Supplies
			Ψ	.,500.00	

Amity Region	al School I JNL#	District No. 5 - Budget Transfers 2022-2023 ACCOUNT NUMBER & DESCRIPTION	AMC	DUNT	DESCRIPTION
JANURARY	ONE	ACCOUNT NOMBER & DESCRIPTION	Airic	<u> </u>	DECOMIT HON
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	\$		Amer. Library Assoc. Dues
Jan-23	51	01-13-2220-5611 INSTRUCTIONAL SUPPLIES	\$		SS Music Assembly, Jan. 20
Jan-23	51	01-13-2220-5330 OTHER PROFESSIONAL & TECH SRVC	\$,	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	\$		SOCIAL STUDIES PRESENTERS
Jan-23	83	04-12-6130-5560 TUITION EXPENSE	\$, ,	Outside Prvdrs for IEP Servcs
Jan-23	83	04-13-2130-5330 OTHER PROFESSIONAL & TECH SRVC	\$		Outside Prvdrs for IEP Servcs
Jan-23	347 347	04-12-1207-5330 OTHER PROFESSIONAL & TECH SRVC	\$ \$, ,	Supplies for Classroom Sp.Prep Supplies for Classroom Sp.Prep
Jan-23 Jan-23	348	04-12-1207-5611 INSTRUCTIONAL SUPPLIES 04-12-2151-5330 OTHER PROFESSIONAL & TECH SRVC	Ф \$		Conference Reimbursement
Jan-23	348	04-13-2190-5581 TRAVEL - CONFERENCES	\$, ,	Conference Reimbursement
Jan-23	393	03-11-1006-5641 TEXTBOOKS	\$		TRANSER FOR SUPPLIES
Jan-23	393	03-11-1006-5690 OTHER SUPPLIES	\$, ,	TRANSER FOR SUPPLIES
FEBRUARY					
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	\$		REPAIR OF LOCKDOWN SYSTEM
Feb-23	37	03-11-1001-5581 TRAVEL - CONFERENCES	\$		cameras needed for classes
Feb-23	37 58	03-11-1001-5730 EQUIPMENT - NEW	\$ \$		cameras needed for classes
Feb-23 Feb-23	56 58	02-14-2600-5420 REPAIRS,MAINTENANCE & CLEANING 05-14-2660-5690 OTHER SUPPLIES	\$ \$, ,	2 additional window covers 2 additional window covers
Feb-23	93	03-11-1008-5810 DUES & FEES	\$		transf funds for TSA activitie
Feb-23	93	03-11-1008-5611 INSTRUCTIONAL SUPPLIES	\$,	transf funds for TSA activitie
Feb-23	146	02-11-1014-5611 INSTRUCTIONAL SUPPLIES	\$		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	\$		Teacher chairs
Feb-23	177	02-13-2220-5330 OTHER PROFESSIONAL & TECH SRVC	\$		Replace color poster printer
Feb-23	177	02-13-2220-5611 INSTRUCTIONAL SUPPLIES	\$, ,	Replace color poster printer
Feb-23 Feb-23	177 177	02-13-2220-5690 OTHER SUPPLIES 02-13-2220-5642 LIBRARY BOOKS & PERIODICALS	\$ \$		Replace color poster printer Replace color poster printer
Feb-23	177	02-13-2220-5042 EISIKAKT BOOKS & FERIODICALS 02-13-2220-5731 EQUIPMENT - REPLACEMENT	\$,	Replace color poster printer
Feb-23	186	03-13-2220-5690 OTHER SUPPLIES	\$		Transfer to purchase books
Feb-23	186	03-13-2220-5642 LIBRARY BOOKS & PERIODICALS	\$,	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	\$		REPAIRS IN WEIGHT ROOM
Feb-23	214	01-14-2219-5611 INSTRUCTIONAL SUPPLIES	\$, ,	INFOSHRED INCREASE NEEDED -PO
Feb-23	214	01-13-2400-5330 OTHER PROFESSIONAL & TECH SRVC	\$	84.00	INFOSHRED INCREASE NEEDED -PO
MARCH	00	OA 40 4000 FOAA INCTRUCTIONAL CURRUIFO	Φ.	(547.00)	CALL C December Other Counties
Mar-23 Mar-23	26 26	04-12-1203-5611 INSTRUCTIONAL SUPPLIES 04-12-1203-5690 OTHER SUPPLIES	\$ \$		SAILS Program Other Supplies SAILS Program Other Supplies
Mar-23	28	02-13-2400-5590 OTHER PURCHASED SERVICES	φ \$		REPAIR TO 911 RADIO SYSTEM
Mar-23	28	02-13-2400-5420 REPAIRS, MAINTENANCE & CLEANING	\$. ,	REPAIR TO 911 RADIO SYSTEM
Mar-23	43	03-14-2600-5420 REPAIRS, MAINTENANCE & CLEANING	\$		United Rental (LIFT)
Mar-23	43	03-14-2600-5440 RENTALS-LAND,BLDG,EQUIPMENT	\$	1,692.00	United Rental (LIFT)
Mar-23	45	01-11-1010-5330 OTHER PROFESSIONAL & TECH SRVC	\$		OnLine AudioRecording Software
Mar-23	45	01-14-2350-5695 TECHNOLOGY SUPPLIES	\$		OnLine AudioRecording Software
Mar-23	49	01-11-1010-5690 OTHER SUPPLIES	\$		Replace out of date amplifier
Mar-23 Mar-23	49 105	01-11-1010-5731 EQUIPMENT - REPLACEMENT 1 -03-11-1001-5730 EQUIPMENT - NEW	\$ \$		Replace out of date amplifier photo consumables
Mar-23	105		,		·
	105	1 -03-11-1001-5611 INSTRUCTIONAL SUPPLIES	\$		photo consumables
Mar-23	106	1 -03-11-1001-5810 DUES & FEES	\$		glazes for ceramics
Mar-23	106	1 -03-11-1001-5611 INSTRUCTIONAL SUPPLIES	\$		glazes for ceramics
Mar-23	114	1 -01-11-1011-5420 REPAIRS, MAINTENANCE & CLEANING			Frisbee Golf and other supplie
Mar-23	114	1 -01-11-1011-5810 DUES & FEES	\$		Frisbee Golf and other supplie
Mar-23	114	1 -01-11-1011-5611 INSTRUCTIONAL SUPPLIES	\$		Frisbee Golf and other supplie
Mar-23	147	1 -03-11-1001-5420 REPAIRS, MAINTENANCE & CLEANING	\$		ink digital lab printers
Mar-23	147	1 -03-11-1001-5611 INSTRUCTIONAL SUPPLIES	\$	289.87	ink digital lab printers
Mar-23	152	1 -02-14-2219-5611 INSTRUCTIONAL SUPPLIES	\$	(1,270.00)	REPLACING POSTER PRINTER
Mar-23	152	1 -02-13-2220-5731 EQUIPMENT - REPLACEMENT	\$	1,270.00	REPLACING POSTER PRINTER
Mar-23	158	1 -03-11-1006-5641 TEXTBOOKS	1037	•	TRNSFR FOR HS MANDARIN TEXT
Mar-23	158	1 -03-11-1013-5641 TEXTBOOKS	\$	(1,037.00)	TRNSFR FOR HS MANDARIN TEXT
Mar-23	159	1 -02-13-2220-5611 INSTRUCTIONAL SUPPLIES	\$		Library Books
Mar-23	159	1 -02-13-2220-5642 LIBRARY BOOKS & PERIODICALS	\$	39.00	Library Books

Amity Regional School District No. 5 - Budget Transfers 2022-2023					
MONTH/YR	JNL#	ACCOUNT NUMBER & DESCRIPTION	AM	OUNT	DESCRIPTION
Mar-23	163	1 -02-14-2219-5611 INSTRUCTIONAL SUPPLIES	\$	(1,835.00)	SPANISH TESTS
Mar-23	163	1 -02-11-1006-5611 INSTRUCTIONAL SUPPLIES	\$	1,835.00	SPANISH TESTS
Mar-23	166	1 -03-11-1005-5810 DUES & FEES	\$	(500.00)	transfer for journals/folders
Mar-23	166	1 -03-11-1005-5611 INSTRUCTIONAL SUPPLIES	\$	500.00	transfer for journals/folders
Mar-23	168	1 -03-11-1009-5611 INSTRUCTIONAL SUPPLIES	\$	(445.00)	FOR REPLACEMENT CHAIRS
Mar-23	168	1 -03-11-1009-5690 OTHER SUPPLIES	\$	445.00	FOR REPLACEMENT CHAIRS
Mar-23	171	1 -01-11-1010-5420 REPAIRS,MAINTENANCE & CLEANING	\$		Another bass needed
Mar-23	171	1 -01-11-1010-5730 EQUIPMENT - NEW	\$	1,310.00	Another bass needed
Mar-23	190	1 -05-13-2213-5580 STAFF TRAVEL	\$	(400.00)	Schoology PD Stipends
Mar-23	190	1 -05-13-2213-5111 CERTIFIED SALARIES	\$		Schoology PD Stipends
Mar-23	192	1 -05-13-2212-5810 DUES & FEES	\$	(129.00)	BOWA Meeting Supplies
Mar-23	192	1 -05-13-2212-5690 OTHER SUPPLIES	\$	129.00	BOWA Meeting Supplies
Mar-23	193	1 -05-13-2212-5611 INSTRUCTIONAL SUPPLIES	\$	(15.81)	BOWA Meeting Supplies
Mar-23	193	1 -05-13-2212-5690 OTHER SUPPLIES	\$	15.81	BOWA Meeting Supplies
Mar-23	198	1 -03-11-1010-5695 TECHNOLOGY SUPPLIES	\$	467.44	Software for Music Classes
Mar-23	198	1 -03-11-1005-5695 TECHNOLOGY SUPPLIES	\$	(33.57)	Software for Music Classes
Mar-23	198	1 -03-11-1009-5695 TECHNOLOGY SUPPLIES	\$	(433.87)	Software for Music Classes
Mar-23	211	1 -03-13-2220-5810 DUES & FEES	\$	(271.00)	Transfer to purchase books
Mar-23	211	1 -03-13-2220-5642 LIBRARY BOOKS & PERIODICALS	\$	271.00	Transfer to purchase books
Mar-23	227	1 -05-14-2510-5690 OTHER SUPPLIES	\$	(743.00)	CASBO CONFERENCE
Mar-23	227	1 -05-14-2510-5581 TRAVEL - CONFERENCES	\$	743.00	CASBO CONFERENCE
Mar-23	234	1 -03-11-1010-5611 INSTRUCTIONAL SUPPLIES	\$	(252.00)	need for repairs in orchestra
Mar-23	234	1 -03-11-1010-5420 REPAIRS, MAINTENANCE & CLEANING	\$	252.00	need for repairs in orchestra
Mar-23	235	1 -03-11-1010-5611 INSTRUCTIONAL SUPPLIES	\$		for lighting rentals MusicFest
Mar-23	235	1 -03-11-1010-5330 OTHER PROFESSIONAL & TECH SRV(\$	1,223.00	for lighting rentals MusicFest
Mar-23	241	1 -05-14-2660-5330 OTHER PROFESSIONAL & TECH SRV(\$	(540.00)	Hideaway Helper Ext. Strap
Mar-23	241	1 -05-14-2660-5690 OTHER SUPPLIES	\$	540.00	Hideaway Helper Ext. Strap
Mar-23	247	1 -01-13-2400-5581 TRAVEL - CONFERENCES	\$	(800.00)	supplies needed for year-end
Mar-23	247	1 -01-14-2219-5690 OTHER SUPPLIES	\$	800.00	supplies needed for year-end
APRIL					
Apr-23	5	1 -03-11-1009-5810 DUES & FEES	\$	225.00	Math Field Trip
Apr-23	5	1 -03-11-1009-5611 INSTRUCTIONAL SUPPLIES	\$	(225.00)	Math Field Trip
Apr-23	6	1 -03-11-1013-5810 DUES & FEES	\$	(2,000.00)	dishwasher for Chem glassware
Apr-23	6	1 -03-11-1013-5730 EQUIPMENT - NEW	\$	2,000.00	dishwasher for Chem glassware
Apr-23	10	1 -04-13-2190-5330 OTHER PROFESSIONAL & TECH SRV(\$	(1,200.00)	IN PERSON TRAINING FOR PARAS

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



Theresa Lumas
Director of Finance and Administration
terry.lumas@amityregion5.org

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

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

From: Theresa Lumas, Director of Finance and Administration

Re: Budget Transfers over \$3,000

Date: June 6, 2023

Facilities:

1. Burnisher

This budget transfer request is to purchase a ride-on burnisher to clean the floors. This item has been removed from the last two budget cycles in order to reduce the budget. The equipment is quoted off the CREC consortium bid.

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 a ride-on burnisher

ACCOUNT

NUMBER	ACCOUNT NAME	FROM	TO
03-14-2600-5410	Utilities	\$27,204	
03-14-2600-5730	Equipment- New		\$27,204

Security:

1. Security Camera Software

This budget transfer request is to purchase a new security camera software monitoring system. We have been looking for the past couple of years to replace Milestone VMS for a new provider with better terms. We are adding a number of security cameras to our facilities and it is more cost effective to do this with a new provider, AXIS. Last month, the Boards approved the purchase of

61

additional cameras. We are also adding cameras in the serving areas of the cafeterias. The expansion of our camera network warrants switching to monitoring services 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 for a security camera software

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NUMBER	ACCOUNT NAME	FROM	TO
04-12-6110-5560	Tuition – Public Out	\$18,896	
05-14-2660-5733	Equipment- New		\$18,896

P5121

Students

Examination/Grading/Rating

The Board of Education believes students will respond more positively to the opportunity for success than to the threat of failure. It seeks, therefore, through performance objectives in its instructional program to make achievement both recognizable and possible for students.

The issuance of grades on a regular basis serves to promote a process of continuous evaluation of student performance, to inform the student, the students' parents and counselor of their progress, and to provide a basis for bringing about change in student performance, if such change seems necessary.

Annually, students in grades 7, 8 and 11 will participate in statewide mastery examinations in language arts and mathematics during any month of the school year. Each student enrolled in grades 8 or 11 shall annually take a state-wide mastery examination in science. Aggregate student and district results will be shared with parents and the Board of Education. Individual student and group results will be analyzed for possible curriculum modification and development of support services. Individual student results will be shared with parents. Achievement of a satisfactory score on the mastery test shall not be used as the sole criterion for promotion or graduation. The State Board of Education shall approve the provision and administration of all mastery examinations.

Students with significant cognitive disabilities in grades 3 through 8 and 11 shall be assessed with the Connecticut Alternate Assessment as determined by their Planning Placement Team and as indicated on their Individualize Education Plan.

(cf. 6146 - Graduation Requirements)

(cf. 6146.2 - Statewide Proficiency/Mastery Examinations)

(cf. 6180 - Evaluation of the Instructional Program)

Legal Reference: Connecticut General Statutes

10-14n State-wide mastery examination (as amended by PA 13-207 and

Section 115 of PA 14-217)

10-14q Exceptions. (Students to whom provisions do not apply.)

10-221a High school graduation requirements.

63 5128.1 5121.3

Students

Plagiarism/Cheating

The Amity Regional School District No. 5 (District) Board of Education (Board) supports an environment of academic integrity. Academic dishonesty is a very serious offense, and plagiarism and cheating will not be tolerated.

<u>Cheating, defined as copying another's work and claiming it as your own or aiding another to obtain credit for work that is not their own, and plagiarism, defined as the use of another person's original ideas or writing without giving credit to the true author, are both prohibited practices. Materials taken from electronic sources are covered by this policy.</u>

Amity students will be taught the standards of responsible and ethical scholarly investigation and writing. They should fully understand that the stealing and use of ideas and works of others of any kind and stating it as their own is plagiarism /cheating and that they have an ethical responsibility for properly acknowledging their indebtedness to those from whom they borrowed their information.

All teachers are charged with the responsibility for teaching the knowledge and skills required for competence in ethical academic responsibility. To that end, teachers should ensure that students fully understand those acts which constitute plagiarism/cheating and are aware fully of the penalties involved when the rules which apply to these actions are violated.

A student who engages in any form of academic dishonesty may be subject to the loss of credit for the work in question, as well as other disciplinary measures.

(c.f. - 5131 – Conduct and Discipline)

Legal Reference: Connecticut General Statutes

10-221 Board of education to prescribe rules, policies, and procedures

Students

Participation in Extracurricular Activities

The Amity Regional School District No. 5 (District) Board of Education (Board) believes that extracurricular activities are an essential component of a comprehensive middle and high school experience. The goal of extracurricular activities is to provide every participant with the opportunity to grow mentally, ethically, physically, and emotionally. Extracurricular activities, for purposes of this policy, includes all extracurricular activities, school athletics, and other school-sponsored activities other than regular classroom and laboratory classes.

Participation in extracurricular activities and athletics is not a right but a privilege that may be regulated. Students participating in extracurricular activities and athletic programs at District schools are therefore expected to adhere to high standards of behavior. Students participating in extracurricular activities are expected to abide by the expectations outlined in District policies pertaining to conduct, the rules established in the student handbooks, as well as all other standard school, classroom, and team/activity expectations.

The Superintendent of School and/or their designee shall develop a Code of Conduct for all participants in extracurricular activities consistent with Board policy, and the rules, policies, and regulations adopted by the Connecticut Interscholastic Athletic Association (CIAC) in which the District maintains a membership. The conduct code shall:

- 1. require participants in extracurricular activities to conduct themselves as good citizens and exemplars of their school at all times, including after school and on days when school is not in session and whether on or off school property,
- 2. notify participants that failure to abide by it could result in removal from the activity, and
- 3. be reviewed by the Superintendent of School and/or their designee periodically at their discretion.

Students must attend school on the day of an extracurricular activity/game unless special permission from the Principal or Athletic Director has been issued.

To retain eligibility for participation in extracurricular activities, students must conduct themselves as good citizens both in and out of school. Any student who is found to have violated the District's Code of Conduct may be deemed ineligible. The Principal and/or their designee or Athletic Director, in consultation with coaches and/or faculty advisors, may declare a student ineligible whose conduct is contrary to and in violation of the rules and regulations established and made known to students or whose conduct is contrary or in violation of Board of Education policy.

Students who engage in significant or recurring incidents of negative behavior are subject to escalating penalties and possible removal from an athletic team or extracurricular activity.

In addition to facing sanctions at the team level, students who violate Board policies will also be subject to disciplinary consequences, up to and including suspension and expulsion from school, in accordance with the Board's student discipline policy.

All athletic coaches and faculty advisors of extracurricular activities shall annually review the

Students

Participation in Extracurricular Activities

rules of conduct with participants and provide participants with a copy.

Head coaches/faculty advisors may establish additional rules and expectations which apply only to their teams or activity. The additional rules may not violate or supersede any rules or procedures of this policy. Additional rules and regulations must be approved by the Building Principal/Athletic Director and distributed in writing to all participants prior to the beginning of the season or activity.

(cf. 5131 – Conduct and Discipline)

(cf. 5131.6-Drugs, Tobacco, Alcohol)

(cf. 5131.8 – Off School Grounds Misconduct)

(c.f. 6145 – Extra-Class Activities)

(c.f. 6145.2 – Interscholastic/Intramural Athletics)

(cf. 6164.11–Drugs, Alcohol, Tobacco)

Legal Reference:

Connecticut General Statutes:

1-21b Smoking prohibited in certain places.

10-19 Teaching about alcohol, nicotine or tobacco, drugs and acquired immune deficiency syndrome. Training of personnel.

10-154a Professional communication between teacher or nurse and student. Surrender or physical evidence obtained from students.

10-220b Policy statement on drugs.

10-221(d) Boards of education to prescribe rules, policies and procedures re sale or possession of alcohol or controlled drugs.

21a-240 Definitions dependency producing drugs.

21a -240(8) Definitions "Controlled Drugs," dependency producing drugs.

21a-240(9) Definitions "controlled substance."

21a-243 Regulation reschedules of controlled substances.

53-198 Smoking in motor buses, railroad cars and school buses.

Federal Regulation 34 CPR Part 85 Drug-free Schools & Communities

Act. 20 U.S.C. Section 7181 et. seq., No Child Left Behind Act.

New Jersey v. T.L.O, 469 U.S. 325 (1985).

Veronia School District 47J v. Acton, 515 U.S. 646 (1995)

Board of Education of Independent School District No 92 of Pottawatomie County v. Earls 01-332 U.S. (2002).

Policy Adopted:

Students

Participation in Extracurricular Activities