

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, April 8, 2024, 6:30 pm
25 Newton Road, Woodbridge, CT

1. **CALL TO ORDER**
2. **PLEDGE OF ALLEGIANCE**
3. **APPROVAL OF MINUTES**
 - a. Regular Board of Education Meeting – March 11, 2024 [page 4](#)
4. **RECOGNITION OF NATIONAL MERIT SCHOLAR FINALISTS [page 10](#)**
5. **STUDENT REPORT**
 - a. Monthly Report
6. **3 A's (Academics, Arts, Athletics) AND POG (Portrait of the Graduate) FOCUS PRESENTATION**
 - a. Middle School Digital Media Class – Presented by Ms. Elizabeth Tremper and Ms. Amy Benton
7. **PUBLIC COMMENT**
8. **SUPERINTENDENT'S REPORT**
 - a. **Personnel Report [page 11](#)**
 - b. **Superintendent Report [page 12](#)**
9. **CORRESPONDENCE**
10. **CHAIRMAN'S REPORT**
 - a. Committee Reports
 1. ACES
 2. CABE
 3. Communications
 4. Curriculum
 - a. Expanding Dual Enrollment Courses at ARHS – Presented by Mr. Frank Purcaro and Mrs. Jill LaPlante
 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
 - i. Electrical Contract [page 18](#)
 - b. Discussion of Monthly Financial Statements [page 19](#)
 - c. Director of Finance and Administration Approved Transfers Under \$3,000 [page 49](#)
 - d. Discussion and Possible Action on Transfers over \$3,000 [page 51](#)
 - e. Other

PLEASE POST

PLEASE POST

- i. CNR Quarterly Report [page 54](#)
- ii. Grants Quarterly Report [page 55](#)

- 10. Policy
 - a. First Read
 - 1. Policy 4111.3 - Minority Recruitment Plan/Increasing Educator Diversity Plan [page 58](#)
 - 2. Bylaw 9132 - Committees [page 59](#)
 - b. Second Read
 - 1. Policy 5141.6 - Crisis Prevention/Response [page 62](#)
- 11. Personnel
 - a. Discussion and Possible Action on Increasing Educator Diversity Plan [page 64](#)

11. **NEW BUSINESS**

12. **ITEMS FOR THE NEXT AGENDA – Due to Chairperson by April 30, 2024**

13. **ADJOURNMENT**



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

pc: Town Clerks Bethany, Orange, Woodbridge

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

District Mission Statement

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

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



NORMS

BE RESPECTFUL

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

HONOR THE POSITION

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

REPRESENT THE BOARD WITH UNITY AND PRIDE

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

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*Dr. Jennifer P. Byars
Superintendent of Schools*

AMITY REGIONAL BOARD OF EDUCATION REGULAR MEETING MINUTES

**Monday, March 11 2024, 6:30 pm
25 Newton Road, Woodbridge, CT**

BOARD MEMBERS PRESENT

Cathy Bradley, Paul Davis, Carla Eichler, Sean Hartshorn, Dr. Karunakaran, Christina Levere-D’Addio, Dana Lombardi, Michael McDonough, Dr. Carol Oladele (attending via phone), Patrick Reed, Donna Schlank and Donna Schuster (arrived at 6:35)

BOARD MEMBERS ABSENT

Andrea Hubbard

STUDENT BOARD MEMBERS PRESENT

Sam Bae and Sophia Messina

STAFF MEMBERS PRESENT

Dr. Jennifer Byars, Theresa Lumas, Frank Purcaro

1. CALL TO ORDER

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

2. PLEDGE OF ALLEGIANCE

MOTION BY Sean Hartshorn, SECOND BY Michael McDonough to add agenda item #13 Personnel Issue Executive Session and move agenda item 13 and 14 to items 14 and 15 respectively.

VOTES IN FAVOR, 11 (Bradley, Davis, Eichler, Hartshorn, Dr. Karunakaran, Levere-D’Addio, Lombardi, McDonough, Reed, Schlank, Schuster)

ABSTAIN, 1 (Dr. Oladele)

MOTION CARRIES

3. APPROVAL OF MINUTES

a. Regular Board of Education Meeting – February 12, 2024

MOTION by Michael McDonough, SECOND by Dr. Karunakaran to approve February 12, 2024, minutes as submitted

VOTES IN FAVOR, 12 (UNANIMOUS)

MOTION CARRIES

b. Special Board of Education Meeting- February 26, 2024

PLEASE POST

PLEASE POST

MOTION by Carla Eichler, SECOND by Michael McDonough to approve February 26, 2024, minutes as submitted
VOTES IN FAVOR, 12 (UNANIMOUS)
MOTION CARRIES

c. Special Board of Education Meeting- March 04, 2024

MOTION by Sean Hartshorn, SECOND by Michael McDonough to approve March 04, 2024, minutes with suggested edits.

VOTES IN FAVOR, 10 (Bradley, Davis, Hartshorn, Levere-D’Addio, Lombardi, McDonough, Dr. Oladele, Reed, Schlank, Schuster)

ABSTAIN, 2 (Eichler, Dr. Karunakaran)

MOTION CARRIES

4. STUDENT REPORT

a. Monthly Report

Presented by Student Representatives Sam Bae and Sophia Messina

5. 3 A’s (Academics, Arts, Athletics) AND POG (Portrait of the Graduate) FOCUS PRESENTATION

a. ARHS Spartan Academy Apiary, Mr. Todd Rainey and Mr. Sean Malloy

[The Spartan Academy Apiary](#)

6. SUPERINTENDENT’S UPDATE ON THE PROPOSED 2024-2025 BUDGET

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

[Superintendents Budget BOE Presentation March 2024.pdf](#)

7. PUBLIC COMMENT

a. Public Comment will be limited to the topics of 1) the 2024-2025 Budget and 2) levels in middle school classes.

Topic: Levels in middle school classes.

Woodbridge Parent:

Speaker questions the transparency of FOIA requests, impact versus intention, class size in relation to the impact of un-leveling, the data to justify un-leveling.

Orange parent:

Speaker questions Amity’s decision to pursue un-leveling, Amity’s COVID 19 policies, books in the LMC, guest speakers, annual budgets, Amity school rankings. The speaker suggests the possibility that Amity will lose its best and brightest to private school.

Woodbridge Parent:

Speaker addressed the budget, urged the community to investigate the DEI position, suggested that CRT is reverse discrimination. He stated that students do not know what DEI is and urges Amity to allow students to “figure it out on their own”.

PLEASE POST

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Parent (town not mentioned):

Speaker states that he is confused about un-leveling. Speaker suggests that students are afraid to attend BOE meetings. Speaker reiterates that he is confused about un-leveling. Speaker suggests the Board should do a better job of explaining the purpose of un-leveling to eliminate confusion amongst the parents and students.

Bethany Resident:

Speaker states that we need to trust professional educators to do what is best for public education. Speaker urges the public to trust those they have been hired to serve public education.

Bethany Parent

Speaker states that he is a teacher in New Haven and shares a personal experience that is unique to his teaching experience. Speaker stresses the difficulty of differentiating in the classroom effectively and his concerns over un-leveling.

Woodbridge Parent:

Member of the Woodbridge Ad Hoc Committee on DEI. Comment was stopped due to being off topic.

Woodbridge Parent

Speaker addresses un-leveling, voices concern if we un-level the classes that students with IEPs will be left out and they will feel worse about themselves.

Student (town not mentioned):

Student voiced concern over un-leveling, the possible social, emotional and academic impact un-leveling would have on students.

Parent (town not mentioned)

Speaker identifies himself as a High School educator, dept chair with young children at home. Speaker urges the community to trust the educators. Speaker suggests that the decision to un-level was likely not malicious nor made on the fly and urges the community to support the decisions made by the board of education.

Topic: Budget

Orange Resident

Speaker addressed the budget and shared budget data and said that he wanted to be sure the community was familiar with the data for consideration.

Orange Parent:

Speaker stressed he enjoyed and appreciated the public forums as opposed to public comment. Speaker addressed the budget and suggested that the conversation should be framed around the narrative "how would this help make Amity better?".

8. DISCUSSION AND POSSIBLE ACTION ON THE BOARD OF EDUCATION 2024-2025 BUDGET

Motion 1:

MOTION BY Patrick Reed, SECOND BY Dr. Karunakaran to approve the Superintendent's Proposed Budget for fiscal year 2024- 25, in the gross amount of \$56,544,652 and the net amount of \$55,360,025, a 3.65% increase over the 2023-2024 budget.

VOTES IN FAVOR, 5 (Davis, Eichler, Dr. Karunakaran, Reed, Schlank)

PLEASE POST

VOTES AGAINST, 7 (Bradley, Levere-D’Addio, Hartshorn, Lombardi, McDonough, Dr. Oladele, Schuster)

MOTION FAILS

PLEASE POST

MOTION BY Sean Hartshorn, SECOND BY Cathy Bradley to amend the Superintendent’s Proposed Budget for fiscal year 2024- 25, in the gross amount of \$56,115,667 and the net amount of \$54,931,040, a 2.86% increase over the 2023-2024 budget.

VOTES IN FAVOR, 4 (Bradley, Hartshorn, Lombardi, McDonough)

ABSTAIN, 1 (Levere-D’Addio)

VOTES AGAINST, 7 (Davis, Eichler, Dr. Karunakaran, Dr. Oladele, Reed, Schlank, Schuster)

MOTION FAILS

MOTION BY Patrick Reed, SECOND BY Carla Eichler to amend the Superintendent’s Proposed Budget for fiscal year 2024- 25, in the gross amount of \$56,456,652 and the net amount of \$55,272,025, a 3.49% increase over the 2023-2024 budget.

VOTES IN FAVOR, 8 (Davis, Eichler, Dr. Karunakaran, Levere-D’Addio, Dr. Oladele, Reed, Schlank, Schuster)

VOTES AGAINST, 4 (Bradley, Hartshorn, Lombardi, McDonough)

MOTION CARRIES

MOTION BY Patrick Reed, SECOND BY Sean Hartshorn to approve the Explanatory text that reads:

Explanatory Text:

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

VOTES IN FAVOR, 12 (UNANIMOUS)

MOTION CARRIES

Important Budget Dates:

Monday, April 8, 2024 -Public Hearing

Monday, May 6, 2024 -Annual Meeting

Monday, May 7, 2024- Referendum

9. SUPERINTENDENT’S REPORT

a. Personnel Report

b. Superintendent Report

10. CORRESPONDENCE

Presented by Amity Board of Education Secretary Mrs. Cathy Bradley

11. CHAIRMAN’S REPORT

a. Committee Reports

1. ACES

2. CABA

PLEASE POST

PLEASE POST

- 3. Communications
- 4. Curriculum
- 5. District Health and Safety
- 6. Diversity, Equity, and Inclusion Executive Committee
- 7. District Technology
 - a. Monthly Report
- 8. Facilities
 - a. Monthly Report
- 9. Finance
 - a. Discussion of Fourth Quarter 2023 Review of Amity Pension, Sick and Severance and OPEB accounts including redistribution of pension allocation
 - b. Special Education Update
 - c. Discussion of Monthly Financial Statements
 - d. Director of Finance and Administration Approved Transfers Under \$3,000
 - e. Discussion and Possible Action on Transfers over \$3,000

MOTION BY Patrick Reed, SECOND BY Michael McDonough to approve the budget transfer for the cost of occupational and physical therapies services, homebound instruction and other support services.

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
04-12-6111-5560	Tuition – Vo-Ag/Tech	\$56,602	
04-13-2130-5330	Prof Technical Services – OT/PT		\$30,602
04-15-1204-5111	Salaries - Certified Prof Technical Services –	\$5,000	
04-13-2130-5330	Homebound		\$5,000
04-13-2190-5330	Prof Tech Services-PPS		\$26,000

VOTES IN FAVOR, 12 (UNANIMOUS)

MOTION CARRIES

- f. Other
- 10. Policy
 - a. Second Read
 - 1. Policy 5141.6 - Crisis Prevention/Response
 - 2. Policy 5142.1 - Relations with Non-Custodial Parents
 - 3. Policy 5142.2 - Safety: Student Dismissal Precautions

MOTION BY Cathy Bradley, SECOND BY Michael McDonough to postpone Policy 5141.6- Crisis Prevention/Response until the April meeting and to approve Policy 5142.1 - Relations with Non-Custodial Parents and Policy 5142.2 Safety: Student Dismissal Precautions as submitted.

VOTES IN FAVOR, 12 (UNANIMOUS)

MOTION CARRIES

- 11. Personnel

12. NEW BUSINESS

13. Personnel Issue Executive Session

MOTION BY Michael McDonough, SECOND BY SEAN HARTSHORN to enter executive session.

PLEASE POST

VOTES IN FAVOR, 11 (UNANIMOUS)

MOTION CARRIES

PLEASE POST

The Board enters Executive Session at 9:47 p.m.

The Board exits Executive Session at 9:59 p.m.

14. ITEMS FOR THE NEXT AGENDA – Due to Chairperson by March 29, 2024

15. ADJOURNMENT

The meeting was adjourned, without objection, at 9:59 p.m by Chairperson Davis.

Respectfully submitted,

Lisa Zaleski

Lisa Zaleski

BOE Recording Secretary



2023-2024

NATIONAL MERIT SCHOLARSHIP PROGRAM

Finalists

👍 ADITI BHATTAMISHRA

HASEEB CHAUDHRY

EDWARD HAN

DEBORAH LUO

JACK MORRISON

ALICE XU

ANNIKA YUN



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

April 8, 2024

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

NEW HIRES-CERTIFIED:

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

NEW HIRES-BENCH/LONG TERM SUBSTITUTES: NONE

NEW HIRES-NON-CERTIFIED:

James Scott – Part Time Security Guard – Amity Middle School-Bethany
Christopher Malizia – HVAC Mechanic/Building Maintainer – District Wide

NEW HIRES-COACHES:

Jessica Cantone – Girls Outdoor Track & Field Coach – 2024 Spring Season – Amity Middle School-Orange

TRANSFERS:

Andrew Campbell – P/T 2nd Shift Custodian at Amity Middle School-Bethany to the position of F/T 2nd Shift Custodian at Amity Middle School-Orange, effective 03/18/2024.

John Hemstead – F/T Lead 2nd Shift Custodian at Amity Regional High School to the position of F/T Head Custodian at Amity Middle School-Bethany, effective 03/22/2024.

RESIGNATIONS:

Samara Koproski – Paraprofessional – SAILS Program-Amity Middle School-Orange, eff. 3/28/2024
Ivonne Baldi – Spanish Language Teacher, Amity Middle School-Orange, eff. 06/30/2024

RETIREMENTS: NONE

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 – April 2024

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 is extended to Amity Regional High School teacher **Wendy Carrafiello** who was nominated and selected as this year's **Amity Teacher of the Year**. Congratulations is also given to **Lisa Criscuolo** for her nomination and selection for the **Amity Award of Excellence**. Ms. Carrafiello and Ms. Criscuolo will be honored at the Board of Education Recognition Event on Thursday May 30, 2024 at 5:15 pm in the ARHS Lecture Hall.

Instruction

Author Visit to Amity: Connecticut author and storyteller Matthew Dicks will be visiting all three Amity schools this week. In addition to being an international best-selling author, Matthew is a multiple Moth Story Slam and Grand Slam champion, a podcaster, a public speaker, a public school teacher, and the co-founder of *Speak Up Storytelling*. Matthew will visit both middle schools to discuss storytelling and writing. He will also speak to students from Amity's high school English classes involved in creative writing and literary analysis and will discuss the process for creating written and oral narratives. At the end of his master classes in the art of storytelling, a Story Slam, open to the entire high school student body, will be held. The opportunity comes to our students in part through the generosity of the Jamie Hulley Arts Foundation.

State Required Spring Assessment: Amity's Junior class has been busy with the annual state-mandated tests over the past month. They took the SAT assessment in school on March 21, 2024 and the NGSS Science assessment on April 3, 2024. Our Sophomores took the voluntary Pre-ACT assessment while the Juniors took the SAT's. All other grades were involved in grade-specific special programming while our Juniors took these two assessments that will factor into next year's School Performance Index.

Flamenco Success: Thanks to a generous grant from the Jamie Hulley Arts Foundation, on March 21, 2024, all Spanish classes participated in workshops on contemporary Flamenco and percussion. Students were able to interact with the culture of Spain through music and movement under the direction of local artist Melinda Marquez. The workshops were so successful that AMSO will be featured in a WTNH News8 feature called "What's Right with School" that will broadcast next month.

Global Studies Fair: On April 10, 2024, AMSB will hold its annual Global Studies Fair. This event is held in our Gymnasium starting at 1:00 and the public is invited to attend. The students have been working for the past few weeks to research a topic of concern and have created multidisciplinary presentations describing their issue and potential solutions to the issue. They will present their findings to the public at the fair and are sure to impress!

AP Lit Attends Long Wharf: 80 students from the 11th grade AP Literature course attended Long Wharf Theater's production of Arthur Miller's "*A View from the Bridge*" in New Haven on Wednesday, March

6, 2024. In addition to the performance, our students were able to participate in a panel discussion with the cast of the play following the performance.

Career Day for 10th Grade Students: Amity held its annual Career Fair for Grade 10 students during school on March 28, 2024. Sophomores had three opportunities to hear from speakers introducing them to a variety of career fields. Altogether, we had 30 guest speakers representing 25 different career options – thank you to the many community members who gave up part of their day to help with the event!

Career Day at AMSO: AMSO students participated in Career Day on March 15, 2024. This year we had over 25 presenters from a wide variety of professions. Students met with professionals in the medical field, the arts, hospitality, government, social services and more.

AMSO Small Ensemble Concert: Several band and orchestra students participated in the AMSO Small Ensemble Concert on March 20, 2024. Students were given the opportunity to highlight their skills and celebrate their passion for music by performing a musical selection of their own choosing. Parents and family members were treated to a wide variety of genres from Mozart to Cold Play.

Entertainers NYC Trip: On April 3, 2024, a group of AMSB students took a trip to NYC to attend a theater workshop and later attend the Broadway production of *Alladin*. The students all participated in the workshop and learned more skills that will translate to the stages of Amity. The play and lunch were a hit!

Professional Development and Evaluation Committee (PDEC): Members of the district's PDEC Committee met this month to continue their work on the development of a new Teacher and Administrator Evaluation and Support Plan. The committee's work has been focused on finalizing the single-point rubric that can be used as an evidence collection tool as part of the evaluation process. PDEC will continue to meet throughout the year in preparation for the submission of a draft plan to the state by June.

ACES Curriculum Writing Training: Social Studies teachers in grades 7-12, English teachers in grades 11-12, and Algebra I teachers met with Dina Secchiaroli from ACES this month for training on curriculum writing in an Understanding by Design format. Teachers were given time to collaborate on lesson design, practice developing essential questions, and create performance-based assessments. Following the training, teachers will begin revising units and assessment throughout the spring and summer.

Curriculum Articulation Meetings: Physical Education & Health, Math and CTE curriculum articulation meetings occurred this past month. The agenda topics included identifying opportunities for targeted professional learning for the 2024-25 school year and discussions about curriculum alignment and pacing.

Learning Walks Update: Instructional learning walks, which are focused on collecting observational evidence of the Portrait of the Graduate, continue regularly throughout the district. As of April 1st, over 100 classroom visits have been conducted. At the building level, administrators are leading their own set of learning walks with teams of teachers for the remainder of this school year.

Resources

Congratulations to Mr. Goodwin!: Congratulations to Athletic Director Ernie Goodwin for being selected to receive the 2024 *Paul Mengold Unified Sports Athletic Director of the Year Award* which will be presented at the CIAC Unified Sports Awards Banquet on April 29, 2024. Mr. Goodwin was selected for all he does to support and facilitate Unified Sports at Amity Regional High School and to include schools in our region in numerous events and activities.

NEAG Job Fair: Amity Region 5 administrators participated in the University of Connecticut job fair for education majors on March 19, 2024. Resumes were collected for teaching positions anticipated for the 2024-2025 school year.

CEC Conference: Teachers from the Amity Pupil Services department attended the annual Council on Exceptional Children Conference in San Antonio. Attended breakout sessions included best practices in transition planning, writing legally defensible IEPs, person centered planning, behavioral support through a communication lens, and linking assessment results to student planning, to name a few. The CEC Conference is the premier special education conference offered annually.

Student Scholarships Available: Spring is “Scholarship Season” for high school seniors, and during March our seniors had the opportunity to apply for approximately 100 different scholarships given by organizations and families in the BOWA communities. Recipients will be selected based on their applications and the individual scholarships’ criteria later this spring.

Multi-Tiered Systems of Support: The district wide MTSS committee met this month to review tiered intervention scenarios for both middle school and high school students. The building-based teams had the chance to draft sample goals and objectives and identify academic and behavioral strategies that best met the student's needs in the mock examples. The committee also continues to build their understanding of the state’s new intervention data collection portal known as CT-SEDS.

SLP Partnership: Amity continues to partner with the Speech and Language Pathology Program at the University of New Haven. Through our partnership with the UNH SLP Program, graduate students at UNH are able to complete their clinical rotations through some of the special education programs within Amity.

Climate

Unified Dance: Amity hosted a Unified Dance for students from ARHS, the Amity middle schools, the Amity Transition Academy at Albertus Magnus and UNH, and Shelton Public Schools on March 21, 2024. Our Culinary Arts classes made snacks, and ARHS paraprofessional Akeem Elliott-Lazarus provided the DJ services – a great time was had by all!

ARHS Library Media Center Guest Speakers: The Amity Library Media Center continued its series of guest speakers in March with a NUMBER of new opportunities for our students to hear from talented and interesting speakers including:

On March 8, 2024 they hosted Ms. Rhonda Roumani, a Syrian-American journalist and scholar who has written about Islam, the Arab world, and Muslim-American issues for more than two decades. She is a Contributing Fellow at the Center for Religion and Civic Culture at USC and an affiliate of Yale’s MacMillan Center, Council on Middle East Studies. She is the author of an award-winning upper middle grade book *Tagging Freedom*. Her first picture book, *Insha’Allah, No, Maybe So* will be released in May of 2024 and has been named a Junior Library Guild Gold Standard Selection.

On March 26, 2024 they hosted Roberto Alfaro, a retired, decorated Hartford, CT. police officer with twenty-one years of dedicated service to his community. Mr. Alfaro is also a SAG/AFTRA actor and professional model of over thirty years, a writer of dozens of poems and short stories, a motivational speaker, an inventor, a salsa dancer and instructor, a former bodybuilding champion and personal trainer, a Hartford Mounted Police rider and instructor, and finally, an author of two books.

Rays Box of Socks: AMSO 8th grade teachers and students would like to thank the Amity School Community for their support of Rays Box of Socks drive. This year the collection far surpassed the goal to collect over 1000 pairs of socks. The socks will be donated to local shelters.

Middle School Hockey Trip: Thanks is extended to the PTSO’s of both middle schools for their

generous support for the whole-school field trips to the Bridgeport Islanders Student Event. Every student was provided with a complimentary snack bag courtesy of the PTSO's.

Spring Athletics: The warmer weather brings out our athletes! The spring athletic season started with 520 student athletes registered for try-outs at ARHS and 238 student athletes registered across our two middle schools.

Mean Girls: The big news in the Amity Arts world is the performance of Amity Creative Theater's *Mean Girls*, which staged its first of a two-weekend run of sold-out performances. Beyond what you will see on stage, this production is a school-wide event that called on the talents of student actors, musicians, stage crew members, and carpenters as well as a team of adult volunteers and advisors to become a reality.

School Climate Survey: The annual school climate survey was administered to students during the last week in March. Surveys were also distributed to staff and families throughout the district. The results will be collected, analyzed, and reported to the Board of Education at a forthcoming meeting.

STEAM Day: Amity High School will be holding its annual STEAM Day event on Wednesday, May 29, 2024. All Bethany, Orange, and Woodbridge fifth grade students are invited to attend this wonderful day and actively engage in Science, Technology, Engineering, the Arts, and Mathematics activities.

Unified Basketball Tournament: On March 22, 2024, Amity Transition Academy (Albertus Magnus) hosted our annual winter unified basketball tournament at the Cosgrove Marcus Messer Athletic Center on the campus of Albertus Magnus College. Students from ATA-UNH Orange, Milford Public Schools, New Haven Public Schools, North Branford, and Southington Public Schools all participated. Thanks to the ATA staff and Albertus Magnus Athletic Director. Amity looks to continue their partnership with the CIAC and growing the Collegiate Unified Sports Offerings.

April 2024

Mar. Ticket Summary

Tickets addressed and closed: 368

Tickets open: 9

HS Student Help Desk

Students helped: 389

Amity Regional School
District No. 5

25 Newton Road

Woodbridge, CT 06525

Phone: 203-397-4817

Fax: 203-397-4864



Amity Regional School District No. 5

Technology Department Monthly Report

Completed Projects:

- All weather stadium data and power installation
 - Anchor cabinets and run final conduit between junction boxes and cabinets was completed in late November; fiber pull between cabinets was completed the first week of April
 - Power has been run to cabinets to support the climate control units and power needs of the switches
- Full audit of the registration process through PowerSchool complete, to updates to address any inefficiencies in the current system have been made. Registration for next school year is under way.

Projects in process:

- All weather stadium data and power installation
 - Need to install and program the switch stacks to complete data installation
- Researching possible solutions to upgrade the District's payment processing services or confirm that MyPaymentsPlus is still the best option
 - Identified 2 possible alternatives and have scheduled demos with the Finance Department to assess the capabilities of each
- The process to migrate all District security cameras to the new Axis camera management system has begun.
 - Bethany Middle School is complete
 - Orange Middle School wire pulling is complete, interior camera installation is complete; outdoor cameras are next
 - The HS is ongoing and is currently operating approximately 90% on the new system and 10% on the legacy system
- Continuously working on the budget building process for Technology needs in the District
 - Final check of the budget to ensure all of this year's needs have been met to date
 - Finalize calculation of all costs saving throughout the year and explore the possibility of using those funds to address unforeseen technology needs

CLEAN

SAFE

HEALTHY

SCHOOLS

Amity Regional School
District No. 5

25 Newton Road

Woodbridge, CT 06525

Phone: 203-397-4817

Fax: 203-397-4864



Amity Regional School District No. 5

Facilities Department Monthly Report

Completed Projects:

- The State mandated inspection reports as part of the Tools for Schools program have been completed.
- Air filter changes were completed on all units district-wide by our in house HVAC maintainer.
- Roof top exhaust fans at the middle schools were serviced by our in house HVAC maintainer.

Projects in Process:

- A compressor for the air handler that serves the black box theater at ARHS is being replaced by our in house HVAC tech.
- The underground sump pump discharge line for the well pit at AMSB is being repaired by an outside contractor.
- All of the failed parking lot light fixtures at ARHS have been replaced. We are working on scheduling lift rentals around the weather to finish replacing the remaining fixtures.
- The ticket booth for the Athletic Department is currently being built by the ARHS Tech Ed. Department.
- The District is working with the Town of Woodbridge to address concerns with the fuel cell and microgrid.
- A leaking circulator pump on the AMSB main heating loop is scheduled for repair by an outside contractor.
- One of the two automatic transfer switches for generator power at ARHS needs to be replaced. Work is being scheduled with our generator service company.
- Facilities and an outside electrical contractor are working with United Illuminating to schedule the final connection from the pole to the scoreboard to complete the new service drop that will power the scoreboard/videoboard. Work should be completed within a week.

Outstanding issues to be addressed:

- Now that the gym floor has been repaired at AMSO, Dalene Flooring is scheduled to return this summer to sand and refinish the entire floor.

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



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

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

To: Dr. Jennifer P. Byars, Superintendent of Schools

From: Theresa Lumas, Director of Finance and Administration

Re: Extension of Electricity Supply Pricing

Date: April 2, 2024

The District is in a consortium with the Town of Woodbridge and Beecher Road School using the consultant, Titan Energy for electricity. Our current electricity supply contract price of \$0.07988, signed in 2020 ends in October 2024. With the current market, Michael Horton, Vice President of Titan Energy New England LLC, believes we can obtain a price of \$.10753 for 36 months (depending on what the market does in the next few days.) I recommend we do this to take advantage of the securing the best rate and terms. The budget assumed the same rate but is anticipated that price difference will be offset by delivery costs and usage estimates.

For the Amity Finance Committee:

Motion to recommend the Amity Board of Education...

For the Amity Board of Education:

Motion to...

... authorize the Superintendent to sign a contract for electricity supply that extends the current contract with a provider offering the best rates for up to 48 months, on behalf of the District, provided the rates are in the best interest of Amity.

**AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES AND EXPENDITURES
FOR FY 2023-2024**

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2022-2023	2023-2024	FEB 24	CHANGE	MAR 24	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
1	MEMBER TOWN ALLOCATIONS	52,349,608	53,388,441	53,388,441	0	53,388,441	0	FAV
2	OTHER REVENUE	260,077	162,413	332,474	0	332,474	170,061	FAV
3	OTHER STATE GRANTS	550,251	965,905	776,831	35,585	812,416	(153,489)	UNF
4	MISCELLANEOUS INCOME	48,328	36,000	34,000	0	34,000	(2,000)	UNF
5	BUILDING RENOVATION GRANTS	0	0	0	0	0	0	FAV
6	TOTAL REVENUES	53,208,264	54,552,759	54,531,746	35,585	54,567,331	14,572	FAV
7	SALARIES	28,162,899	29,742,117	29,409,473	0	29,409,473	(332,644)	FAV
8	BENEFITS	6,022,653	6,540,201	6,697,055	0	6,697,055	156,854	UNF
9	PURCHASED SERVICES	8,634,134	9,863,306	9,854,103	(33,215)	9,820,888	(42,418)	FAV
10	DEBT SERVICE	4,485,716	4,417,942	4,417,942	0	4,417,942	0	FAV
11	SUPPLIES (INCLUDING UTILITIES)	2,890,187	3,333,435	3,310,291	(34,500)	3,275,791	(57,644)	FAV
12	EQUIPMENT	248,752	82,530	94,426	28,200	122,626	40,096	UNF
13	IMPROVEMENTS / CONTINGENCY	164,921	373,500	355,294	(13,700)	341,594	(31,906)	FAV
14	DUES AND FEES	159,130	199,728	199,728	0	199,728	0	FAV
15	TRANSFER ACCOUNT	1,066,995	0	0	0	0	0	FAV
16	TOTAL EXPENDITURES	51,835,386	54,552,759	54,338,312	(53,215)	54,285,097	(267,662)	FAV
17	SUBTOTAL	1,372,878	0	193,434	88,800	282,234	282,234	FAV
18	PLUS: CANCELLATION OF PRIOR YEAR'S ENCUMBRANCES	47,518	0	0	0	0	0	FAV
19	DESIGNATED FOR SUBSEQUENT YEAR'S BUDGET:	0	0	0	0	0	0	FAV
20	NET BALANCE / (DEFICIT)	1,420,396	0	193,434	88,800	282,234	282,234	FAV

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

**AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES AND EXPENDITURES
FOR FY 2023-2024**

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2022-2023	2023-2024	FEB 24	CHANGE	MAR 24	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
1	BETHANY ALLOCATION	8,791,370	9,317,351	9,075,014	0	9,075,014	(242,337)	UNF
1a	PRIOR YEAR CREDIT BETHANY	126,909		242,337		242,337	242,337	
2	ORANGE ALLOCATION	26,011,943	26,103,744	25,388,491	0	25,388,491	(715,253)	UNF
2a	PRIOR YEAR CREDIT ORANGE	356,031		715,253		715,253	715,253	
3	WOODBIDGE ALLOCATION	16,834,358	17,967,346	17,504,540	0	17,504,540	(462,806)	UNF
3a	PRIOR YEAR CREDIT WOODBRIDGE	228,997		462,806		462,806	462,806	
4	MEMBER TOWN ALLOCATIONS	52,349,608	53,388,441	53,388,441	0	53,388,441	0	FAV
6	ADULT EDUCATION	4,754	4,000	4,521	0	4,521	521	FAV
7	PARKING INCOME	31,143	32,400	32,400	0	32,400	0	FAV
8	INVESTMENT INCOME	82,951	20,000	125,000	0	125,000	105,000	FAV
9	ATHLETICS	33,727	24,000	24,000	0	24,000	0	FAV
10	TUITION REVENUE	85,402	58,613	124,453	0	124,453	65,840	FAV
11	TRANSPORTATION INCOME	22,100	23,400	22,100	0	22,100	(1,300)	UNF
12	TRANSPORTATION BOWA AGREEMENT	0	0	0	0	0	0	FAV
13	OTHER REVENUE	260,077	162,413	332,474	0	332,474	170,061	FAV
14	OTHER STATE GRANT	0	0	0	0	0	0	FAV
15	SPECIAL EDUCATION GRANTS	550,251	965,905	776,831	35,585	812,416	(153,489)	UNF
16	OTHER STATE GRANTS	550,251	965,905	776,831	35,585	812,416	(153,489)	UNF
17	RENTAL INCOME	32,938	18,000	16,000	0	16,000	(2,000)	UNF
18	INTERGOVERNMENTAL REVENUE	1,872	0	0	0	0	0	FAV
19	OTHER REVENUE	13,518	18,000	18,000	0	18,000	0	FAV
20	TRANSFER IN	0	0	0	0	0	0	FAV
21	MISCELLANEOUS INCOME	48,328	36,000	34,000	0	34,000	(2,000)	UNF
22	BUILDING RENOVATION GRANTS	0	0	0	0	0	0	FAV
23	TOTAL REVENUES	53,208,264	54,552,759	54,531,746	35,585	54,567,331	14,572	FAV

Column 7: FAV=Favorable Variance

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

**AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES AND EXPENDITURES
FOR FY 2023-2024**

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2022-2023	2023-2024	FEB 24	CHANGE	MAR 24	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
1	5111-CERTIFIED SALARIES	23,216,292	24,354,524	24,039,449	0	24,039,449	(315,075)	FAV
2	5112-CLASSIFIED SALARIES	4,946,607	5,387,593	5,370,024	0	5,370,024	(17,569)	FAV
3	SALARIES	28,162,899	29,742,117	29,409,473	0	29,409,473	(332,644)	FAV
4	5200-MEDICARE - ER	390,667	432,831	432,831	0	432,831	0	FAV
5	5210-FICA - ER	309,143	341,251	341,251	0	341,251	0	FAV
6	5220-WORKERS' COMPENSATION	136,272	178,436	158,561	0	158,561	(19,875)	FAV
7	5255-MEDICAL & DENTAL INSURANCE	3,915,076	4,364,277	4,488,063	0	4,488,063	123,786	UNF
8	5860-OPEB TRUST	267,232	265,890	265,890	0	265,890	0	FAV
9	5260-LIFE INSURANCE	47,172	63,986	59,986	0	59,986	(4,000)	FAV
10	5275-DISABILITY INSURANCE	11,528	12,062	12,667	0	12,667	605	UNF
11	5280-PENSION PLAN - CLASSIFIED	725,924	726,430	726,430	0	726,430	0	FAV
12	5281-DEFINED CONTRIBUTION RETIREMENT PLAN	173,968	144,838	178,463	0	178,463	33,625	UNF
13	5282-RETIREMENT SICK LEAVE - CERT	0	0	0	0	0	0	FAV
14	5283-RETIREMENT SICK LEAVE - CLASS	0	0	0	0	0	0	FAV
15	5284-SEVERANCE PAY - CERTIFIED	0	0	0	0	0	0	FAV
16	5290-UNEMPLOYMENT COMPENSATION	44,491	8,000	28,513	0	28,513	20,513	UNF
17	5291-CLOTHING ALLOWANCE	1,181	2,200	4,400	0	4,400	2,200	UNF
18	BENEFITS	6,022,653	6,540,201	6,697,055	0	6,697,055	156,854	UNF
19	5322-INSTRUCTIONAL PROG IMPROVEMENT	16,211	60,750	60,750	0	60,750	0	FAV
20	5327-DATA PROCESSING	133,292	148,943	148,943	0	148,943	0	FAV
21	5330-PROFESSIONAL & TECHNICAL SRVC	2,305,289	2,129,048	2,240,306	0	2,240,306	111,258	UNF
22	5440-RENTALS - LAND, BLDG, EQUIPMENT	100,905	117,846	117,846	0	117,846	0	FAV
23	5510-PUPIL TRANSPORTATION	3,453,836	3,931,690	3,973,425	0	3,973,425	41,735	UNF
24	5521-GENERAL LIABILITY INSURANCE	274,546	308,963	290,994	0	290,994	(17,969)	FAV
25	5550-COMMUNICATIONS: TEL, POST, ETC.	85,631	114,805	114,805	0	114,805	0	FAV
26	5560-TUITION EXPENSE	2,186,995	2,963,731	2,819,504	(33,215)	2,786,289	(177,442)	FAV
27	5590-OTHER PURCHASED SERVICES	77,429	87,530	87,530	0	87,530	0	FAV
28	PURCHASED SERVICES	8,634,134	9,863,306	9,854,103	(33,215)	9,820,888	(42,418)	FAV

Column 7: FAV=Favorable Variance

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

**AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES AND EXPENDITURES
FOR FY 2023-2024**

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2022-2023	2023-2024	FEB 24	CHANGE	MAR 24	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
28	5830-INTEREST	788,835	523,986	523,986	0	523,986	0	FAV
29	5910-REDEMPTION OF PRINCIPAL	3,696,881	3,893,956	3,893,956	0	3,893,956	0	FAV
30	DEBT SERVICE	4,485,716	4,417,942	4,417,942	0	4,417,942	0	FAV
31	5410-UTILITIES, EXCLUDING HEAT	591,847	710,802	710,802	(20,000)	690,802	(20,000)	FAV
32	5420-REPAIRS, MAINTENANCE & CLEANING	651,502	773,846	787,802	10,400	798,202	24,356	UNF
33	5611-INSTRUCTIONAL SUPPLIES	331,437	405,738	405,738	0	405,738	0	FAV
34	5613-MAINTENANCE/CUSTODIAL SUPPLIES	178,468	240,320	236,620	(24,900)	211,720	(28,600)	FAV
35	5620-OIL USED FOR HEATING	49,050	64,900	64,900	0	64,900	0	FAV
36	5621-NATURAL GAS	97,149	115,245	80,245	0	80,245	(35,000)	FAV
37	5627-TRANSPORTATION SUPPLIES	140,980	188,515	188,515	0	188,515	0	FAV
38	5641-TEXTS & DIGITAL RESOURCES	144,702	131,085	131,085	0	131,085	0	FAV
39	5642-LIBRARY BOOKS & PERIODICALS	20,185	20,550	20,550	0	20,550	0	FAV
40	5690-OTHER SUPPLIES	238,030	246,699	246,699	0	246,699	0	FAV
41	5695-OTHER SUPPLIES-TECHNOLOGY	446,838	435,735	437,335	0	437,335	1,600	UNF
42	SUPPLIES (INCLUDING UTILITIES)	2,890,187	3,333,435	3,310,291	(34,500)	3,275,791	(57,644)	FAV
43	5730-EQUIPMENT - NEW	45,678	1,000	1,000	5,500	6,500	5,500	UNF
44	5731-EQUIPMENT - REPLACEMENT	56,170	5,000	18,496	22,700	41,196	36,196	UNF
45	5732-EQUIPMENT - TECH - NEW	66,582	2,030	2,030	0	2,030	0	FAV
46	5733-EQUIPMENT - TECH - REPLACEMENT	80,322	74,500	72,900	0	72,900	(1,600)	FAV
47	EQUIPMENT	248,752	82,530	94,426	28,200	122,626	40,096	UNF
48	5715-IMPROVEMENTS TO BUILDING	123,835	29,500	29,500	0	29,500	0	FAV
48a	5715-FACILITIES CONTINGENCY	100,000	100,000	100,000	0	100,000	0	FAV
48b	TRSF. FROM FACILITIES CONTINGENCY	(100,000)	0	(18,206)	(13,700)	(31,906)	(31,906)	FAV
49	5720-IMPROVEMENTS TO SITES	41,086	94,000	94,000	0	94,000	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	0	0	0	0	FAV
50c	IMPROVEMENTS / CONTINGENCY	164,921	373,500	355,294	(13,700)	341,594	(31,906)	FAV

Column 7: FAV=Favorable Variance

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

**AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES AND EXPENDITURES
FOR FY 2023-2024**

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2022-2023	2023-2024	FEB 24	CHANGE	MAR 24	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
51	5580-STAFF TRAVEL	17,858	24,650	24,650	0	24,650	0	FAV
52	5581-TRAVEL - CONFERENCES	51,783	66,380	66,380	0	66,380	0	FAV
53	5810-DUES & FEES	89,489	108,698	108,698	0	108,698	0	FAV
54	DUES AND FEES	159,130	199,728	199,728	0	199,728	0	FAV
55	5856-TRANSFER ACCOUNT	1,066,995	0	0	0	0	0	FAV
55a	ESTIMATED UNSPENT BUDGETS		0	0	0	0	0	FAV
56	TOTAL EXPENDITURES	51,835,386	54,552,759	54,338,312	(53,215)	54,285,097	(267,662)	FAV
56								
Note:	RESTRICTED - RETURN TO TOWNS	1,420,396						

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



March 2024

2023-2024 FORECAST

OVERVIEW

The projected unspent fund balance for this fiscal year is \$282,234 FAV, previously \$193,434 FAV, which appears on page 1, column 6, and line 20. The audited unspent funds from fiscal year 2023, (\$1,372,878 plus \$47,518 unspent encumbrance FY22) was deducted from the town allocations in March 2024. This administration may 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 \$1,091,054 of the current budget if funds become available. The item will be presented after the final balance for FY24 is confirmed at the August 2024 meeting.

REVENUES BY CATEGORY

The projected yearend balance of revenues is *\$14,572, FAV, previously \$21,013 UNF* which appears on page 2, column 6, line 23.

LINES 1a, 2a, and 3a on Page 2: PRIOR YEAR CREDIT:

The line is for the unspent funds from FY23. Unspent funds of \$1,420,396 FAV will be credited to the member towns' March payments. This is comprised of \$1,372,878 of unspent funds in FY23 and unliquidated encumbrances from FY22 of \$47,518. *The town allocations were reduced in March 2024.*

LINE 6 on Page 2: ADULT EDUCATION:

The forecast is based on historical data of State payments. *The forecast is \$521 FAV based on actual receipts.*

LINE 7 on Page 2: PARKING INCOME:

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

LINE 8 on Page 2: INVESTMENT INCOME:

The forecast is based on the budget developed. *Interest rates are still trending higher so the forecast is \$105,000 FAV, previously \$105,000 FAV.*

<u>Month</u>	<u>M&T Bank</u>	<u>State Treasurer's Investment Fund</u>
July 2023	.40%	5.18%
August 2023	.40%	5.47%
September 2023	.40%	5.52%

October 2023	.40%	5.55%
November 2023	.40%	5.45%
December 2023	.40%	5.57%
January 2024	.40%	5.58%
February 2024	.40%	5.57%
March 2024	.40%	5.56%

LINE 9 on Page 2: ATHLETICS:

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

LINE 10 on Page 2: TUITION REVENUE:

The budget is based on five tuition students, three at a reduced employee rates. **Full tuition rate is \$21,058.** The actual tuition charged is higher (\$916 per year). Eight tuition students are enrolled, including three at reduced employee rates. *The forecast is \$65,840 FAV previously \$65,840 FAV including \$2,666 from the rate change.*

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 80% reimbursement rate. *The State passed legislation in June 2023 which increased the reimbursement rate to 85% but recent reports indicated the District will only receive even less than the 73% reimbursement rate and should expect only 68%. Based on expenses reported to the State on March 1st, the State has revised the formula to increase the reimbursement rate to 71.1%, the forecast is \$153,489 UNF, previously \$189,074 UNF.*

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 \$2,000 UNF based on YTD and scheduled rentals, previously neutral.*

LINE 19 on Page 2: OTHER REVENUE:

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

EXPENDITURES BY CATEGORY

The projected yearend balance of expenditures is \$267,662 FAV, previously \$214,447 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. *Turnover on positions filled to date exceeds the turnover estimates by \$205,716 FAV, previously \$205,716 FAV.*

The forecast reflects 5 unpaid leaves of absences year-to-date, \$127,477 FAV and \$23,324 UNF in additional stipends and coverage costs.

LINE 2 on Page 3: 5112-CLASSIFIED SALARIES:

The forecast is based on budget. Turnover on positions filled to date exceeds the turnover estimates but is offset by overtime costs for a net **\$17,569 FAV**, previously \$40,284 FAV.

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

The forecast is based on budget.

LINE 6: 5220 on Page 3-WORKERS' COMPENSATION:

The workers' compensation premium is less than budgeted. The renewal policy is **\$19,875 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 \$19,875 FAV.**

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

The following charts are included to track how the District's actual claims are comparing against the expected claims. How claims are running for the year has always been a common question, so the charts for claims and fees are shown monthly. However, claims are one piece of the medical budget line shown in the Excel file. Fees, employee contributions, grant funding, employer contributions to employee HSA accounts and reserve funding are other factors built into the Medical and Dental Insurance Budget. The claims chart in the Word document will not equal the Excel line since it is only one factor of the data comprising the medical budget. Certainly a significant factor which is why it is given in detail below. ***Our insurance consultants monitor claims closely and currently estimate the current claim costs and number of high cost claimants will exceed the budget for this year. Claims are forecasted to be over budget by \$123,786.***

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

CLAIMS OF CURRENT EMPLOYEES AND RETIREES

MONTH	2023-2024 ACTUAL	2023-2024 BUDGET	VARIANCE	2022-2023 ACTUAL	2021-2022 ACTUAL
<i>JUL*</i>	\$ 364,829	\$ 349,192	\$ 15,637	\$ 34,837	\$ 530,877
<i>AUG</i>	\$ 641,037	\$ 488,191	\$ 152,846	\$ 798,616	\$ 405,635
<i>SEP</i>	\$ 412,377	\$ 448,507	\$ (36,130)	\$ 551,212	\$ 364,327
<i>OCT</i>	\$ 508,930	\$ 368,111	\$ 140,819	\$ 297,594	\$ 341,109
<i>NOV</i>	\$ 541,882	\$ 431,134	\$ 110,748	\$ 306,068	\$ 324,557
<i>DEC</i>	\$ 363,042	\$ 573,078	\$ (210,036)	\$ 435,108	\$ 767,843
<i>JAN</i>	\$ 220,714	\$ 368,880	\$ (148,166)	\$ 311,328	\$ 320,277
<i>FEB</i>	\$ 183,906	\$ 267,455	\$ (83,549)	\$ 190,062	\$ 176,127
<i>MAR</i>	\$ 261,829	\$ 347,465	\$ (85,636)	\$ 313,582	\$ 263,761
<i>APR</i>	\$ 313,538	\$ 313,538	\$ -	\$ 222,547	\$ 328,046
<i>MAY</i>	\$ 328,529	\$ 328,529	\$ -	\$ 486,004	\$ 183,944
<i>JUN</i>	\$ 328,369	\$ 328,369	\$ -	\$ 302,891	\$ 371,250
TOTALS	\$ 4,468,982	\$ 4,612,447	\$ (143,465)	\$ 4,249,849	\$ 4,377,753

ACTUAL/FORECAST CLAIMS AS A PERCENTAGE OF EXPECTED CLAIMS

2019-2020 ACTUAL	2020-2021 ACTUAL	2021-2022 ACTUAL	2022-2023 ACTUAL	2023-2024 FORECAST
84.1%	75.8%	97.3%	93.6%	96.9%

***Incomplete billing cycle in July 23**

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

MONTH	2023-2024 ACTUAL	2023-2024 BUDGET	VARIANCE	2022-2023 ACTUAL	2021-2022 ACTUAL
<i>JUL</i>	\$ 44,555	\$ 35,310	\$ 9,245	\$ 30	\$ 14,068
<i>AUG</i>	\$ 54,176	\$ 59,210	\$ (5,034)	\$ 83,030	\$ 74,642
<i>SEP</i>	\$ 53,028	\$ 48,804	\$ 4,224	\$ 61,858	\$ 46,923
<i>OCT</i>	\$ 52,666	\$ 50,627	\$ 2,039	\$ 47,063	\$ 47,049
<i>NOV</i>	\$ 53,732	\$ 49,695	\$ 4,037	\$ 50,445	\$ 39,556
<i>DEC</i>	\$ 53,218	\$ 52,414	\$ 804	\$ 52,888	\$ 51,770
<i>JAN</i>	\$ 48,165	\$ 42,568	\$ 5,597	\$ 25,978	\$ 48,349
<i>FEB</i>	\$ 57,785	\$ 62,028	\$ (4,243)	\$ 46,388	\$ 81,821
<i>MAR</i>	\$ (8,744)	\$ 51,394	\$ (60,138)	\$ 74,389	\$ 34,780
<i>APR</i>	\$ 46,919	\$ 46,919	\$ -	\$ 43,145	\$ 37,237
<i>MAY</i>	\$ 50,422	\$ 50,422	\$ -	\$ 47,499	\$ 41,664
<i>JUN</i>	\$ 41,342	\$ 41,342	\$ -	\$ 18,816	\$ 44,118
TOTALS	\$ 547,264	\$ 590,733	\$ (43,469)	\$ 551,529	\$ 561,977

LINE 9 on Page 3: 5260-LIFE INSURANCE:

The forecast is based on forecasted actual costs, \$4,000 FAV, previously \$4,000 FAV

LINE 10 on Page 3: 5275-DISABILITY INSURANCE:

The forecast \$605 UNF based on actual.

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

The forecast is based on preliminary estimates and is \$33,625 UNF, previously \$33,265 UNF. As staff retires and new staff is hired, the costs on this line increases.

LINE 16 on Page 3: 5290-UNEMPLOYMENT:

The forecast is based on budget. Forecast estimate is \$20,513 UNF, previously \$20,513 UNF.

LINE 21 on Page 3: 5330-PROFESSIONAL TECHNICAL SERVICES:

The forecast is forecasted to be \$111,258 UNF due to transfers approved for services to cover unfilled paraeducators positions, homebound instruction, and legal services for District.

LINE 22 on Page 3: 5440-RENTALS:

The forecast is based on budget.

LINE 23 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. *The forecast for these accounts is based on current student services. The transportation accounts are \$41,735 UNF, previously \$41,735 UNF.* The Pupil Services Director was able to combine a run with one of the elementary districts and save some costs on the run. A few of the vocational school runs came in slightly under budget.

LINE 24 on Page 3: 5521-GENERAL LIABILITY INSURANCE: Various liability policies, including medical professional, public bond and cyber insurance renewed under budget, while Student Accident insurance renewed over budget. Cyber insurance is under budget by \$13,730 FAV due to the steps the District has taken to increase security measures, including adding a cyber-technician. **Account is \$17,969 FAV.**

LINE 25 on Page 3: 5550-COMMUNICATION: TEL, POST, ETC:

The forecast is based on budget.

LINE 26 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 for these accounts is \$177,442 FAV, previously \$144,227 FAV for the FY24 school year based on actual student placements and services.* Outplaced tuition rates are higher than budgeted in most cases.

Tuition for the Vo-Ag schools is \$81,354 FAV, previously \$81,354 FAV.

	FY19-20 ACTUAL	FY20-21 ACTUAL	FY21-22 ACTUAL	FY22-23 ACTUAL	FY23-24 BUDGET	FY23-24 FORECAST
Sound	6	5	3	3	5	3(3)
Trumbull	4	3	1	3	4	3(3)
Nonnewaug	5	7	9	7	8	7(7)
Common Ground Charter HS	0	1	1	3	3	2(2)
Fairchild Wheeler	0	0	0	0	2	0
Emmett O'Brien	0	0	0	2	0	0(0)
Hill Career Magnet	0	0	0	1	0	0(0)
Wintergreen Magnet	0	0	1	0	0	0

Marine Science Magnet HS	0	0	0	1	0	0(0)
Eli Whitney Tech	0	0	0	0	0	0
Engineering Science Magnet	0	0	0	0	1	0
Highville Charter School	0	0	0	0	0	0
Totals	15	16	15	20	23	15(15)

ECA is \$1,102 UNF, previously \$1,102 UNF.

	FY19-20 ACTUAL	FY20-21 ACTUAL	FY21-22 ACTUAL	FY22-23 ACTUAL	FY23-24 BUDGET	FY23-24 FORECAST
ECA	21	16	18	19	19	19

Public (ACES) and private out-of-district placements are \$96,088 FAV, previously \$63,975 FAV.

	FY19-20 ACTUAL	FY20-21 ACTUAL	FY21-22 ACTUAL	FY22-23 ACTUAL	FY23-24 BUDGET	FY23-24 FORECAST
Public SPED	8	6	10	9	9	10(10)
Private SPED	18	27	20	16	20	20(20)
Totals	26	33	30	25	29	30(30)

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

The 2023-2024 budget for electricity assumes the use of 3,377,000 kilowatt hours at an average price of 0.07988 or a cost of \$620,567 with delivery charges. Forecast is \$20,000 FAV, previously neutral.

The budget for propane is \$4,635. *The forecast is neutral.*

The budget for water is \$57,600. *The forecast is neutral.*

Sewer costs are budgeted at \$28,000. *The forecast is neutral.*

ELECTRICITY (KILOWATT HOURS)

MONTH	2023-2024 FORECAST	2023-2024 BUDGET	VARIANCE	2022-2023 ACTUAL	2021-2022 ACTUAL
<i>JUL</i>	275,363	281,681	<i>(6,318)</i>	325,263	296,292
<i>AUG</i>	339,333	310,955	28,378	350,459	321,023
<i>SEP</i>	295,827	320,370	<i>(24,543)</i>	294,292	314,756
<i>OCT</i>	250,944	293,269	<i>(42,325)</i>	252,949	272,755
<i>NOV</i>	251,734	271,376	<i>(19,642)</i>	252,160	256,208
<i>DEC</i>	233,988	272,340	<i>(38,352)</i>	245,784	259,994
<i>JAN</i>	236,228	286,676	<i>(50,448)</i>	262,051	257,539
<i>FEB</i>	271,842	282,404	<i>(10,562)</i>	259,362	271,979
<i>MAR</i>	253,936	266,509	<i>(12,573)</i>	249,254	255,631
APR	274,626	274,626	-	250,112	255,629
MAY	261,987	261,987	-	264,292	277,953
JUN	254,807	254,807	-	287,285	296,900
Totals	3,200,615	3,377,000	(176,385)	3,293,263	3,336,659

DEGREE DAYS

There are 4,449 degree days to date as opposed to 5,025 last year.

LINE 32 on Page 4: 5420-REPAIRS & MAINTENANCE: The forecast is projected to be over budget, **\$24,356 UNF**, previously **\$13,956 UNF**. Two transfers were approved in October to cover repairs to the fire pump (\$11,106) and the chiller (\$7,100) at Amity Middle School-Bethany. *A transfer is requested in April for excavation (\$7,500) and sump pump repair (\$6,200) at Amity Middle School-Bethany.*

LINE 34 on Page 4: 5613-MAINTENANCE SUPPLIES: *The forecast is projected to be \$28,600 FAV, previously neutral.*

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

The budget for natural gas is \$115,245 and the budget for oil is \$3.05 per gallon, and \$63,400 annually. *The forecast is projected to be \$35,000 FAV due to lower prices and a milder winter, previously \$35,000 FAV.*

LINE 41 on Page 4: 5695-OTHER SUPPLIES- TECHNOLOGY:

The forecast is projected to be **\$1,600 UNF**, previously **\$1,600 UNF**. Some prices for equipment were under budget while some software prices were overbudget.

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

The forecast is projected to be \$5,500 UNF due to the purchase of a restroom cleaning machine for Amity Middle School – Orange, if the transfer is approved in April, previously neutral.

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

The forecast is projected to be \$36,196 UNF, previously \$13,496 UNF. Two transfers were approved; one for replacing a failed amplifier system for special education and the

second for two backpack vacuum cleaners that failed. *Three transfers are requested in April for a floor scrubber machine at the high school (\$16,000), 2 backpack and 3 upright vacuum cleaners for Amity Middle School – Orange, and replacement door the gymnasium at Amity Middle School-Bethany (\$3,400).*

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

The forecast is projected to be *\$1,600 FAV*, previously \$1,600 FAV. Some prices for equipment were under budget while some software prices were over budget.

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

The budget includes a \$100,000 contingency for unplanned, necessary facility expenditures. The forecast assumes these funds will be entirely used. Two transfers were approved in October to cover repairs to the fire pump (\$11,106) and the chiller (\$7,100) at Amity Middle School-Bethany. *A transfer is requested in April for excavation (\$7,500) and sump pump repair (\$6,200) at Amity Middle School-Bethany. The balance in the facilities contingency accounts is \$68,094 after approved transfers.*

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.

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 \$1,091,054 of the current budget. The item will be presented after the final balance for the FY24 is confirmed at the September 2024 meeting.

LINE 1a, 2a, and 3a on Page 2: PRIOR YEAR CREDIT:

The line is for the unspent funds from FY23. Unspent funds of \$1,420,396 FAV will be credited to the member towns' March payments. This is comprised of \$1,372,878 of unspent funds in FY23 and unliquidated encumbrances from FY22 of \$47,518. *The town allocations were reduced in March 2024.*

APPENDIX A

COST SAVINGS AND EFFICIENCIES FOR FISCAL YEAR 2023-2024

TOTAL ANNUAL SAVINGS TO-DATE OF: \$199,030

\$7,119- Cable Advisory Grant: The Director of Technology applied for funds to purchase a new projector for the Brady Center. The Brady Center is an alternate space for conducting/broadcasting Board meetings. This meets the grant criteria.

\$18,446 E-Rate Credits: The District's application for E-Rate credits is submitted. The amount will reflect discounted invoices for the CEN – state provided internet connection.

\$59,706 Pegpetia Grant: The District's application for Pegpetia funds was approved. The District used these funds for camcorders, cases, wireless signal transmitter and intercom system, and channel amplifier for live event coverage in the broadcast journalism production curriculum.

\$74,433 Emergency Connectivity Fund (EFC) Grant: The District's application for EFC funds was approved. The Administration plans to use these funds toward the ARHS Library renovation. This grant was a reimbursement grant for 12 months of lease services of student devices offered during the pandemic.

\$27,500 Transportation: Mr. Brant coordinated with one of our elementary districts to share the cost of bussing to an outplacement facility.

\$11,826 Furniture: Ms. Lumas coordinated with other District's through Connecticut Association of School Business Officials (CASBO) to purchase used classroom desks and chairs for the high school and one of the middle schools. 54 desks were purchased for \$540. Desks were budgeted at \$229 per desk but removed during the budget process in order to reduce the budget.

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

- Energy Savings Initiatives for the past decade
<http://www.amityregion5.org/boe/sub-committees/finance-committee>
- District recognized CQIA Innovation Prize for Fostering a District Culture of Maximizing Cost Savings and Efficiencies
<http://www.amityregion5.org/boe/sub-committees/finance-committee2>
- Fiscal Year 2022-23- \$42,565 <https://www.amityregion5.org/boe/sub-committees/finance-committee>
- Fiscal Year 2021-22- \$78,854 <https://www.amityregion5.org/boe/sub-committees/finance-committee>

- Fiscal Year 2020-2021 - \$128,708 <https://www.amityregion5.org/boe/sub-committees/finance-committee>
- Fiscal Year 2019-2020 - \$43,497 <https://www.amityregion5.org/boe/sub-committees/finance-committee>
- Fiscal Year 2018-2019 - \$52,451 <https://www.amityregion5.org/boe/sub-committees/finance-committee>

- Fiscal Year 2017-2018 – \$746,688 <https://www.amityregion5.org/boe/sub-committees/finance-committee>

- Fiscal Year 2016-2017 – \$595,302 <http://www.amityregion5.org/boe/sub-committees/finance-committee>

- Fiscal Year 2015-2016 – \$125,911 <http://www.amityregion5.org/boe/sub-committees/finance-committee>
- Fiscal Year 2014-2015 – \$139,721 <http://www.amityregion5.org/boe/sub-committees/finance-committee>

APPENDIX B

MONTHLY FORECASTS: PURPOSE, METHODOLOGY, HISTORICAL

PURPOSE & METHODOLOGY:

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

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

Two of the three past fiscal years were significantly impacted by the COVID-19 pandemic. School operations were halted or modified and not at 100% for either year. The District staff took many steps to reserve the general operating budget to meet the demands and brace for the unknown costs. Nearly one million dollars was held from accounts to prepare for operations in fiscal year 2021. Grant funding from State and Federal sources became available during the year. These funds were used to offset unexpected costs and plan for the future costs. Some of the funds do not expire until September 2024. The administration is planning to use funds as required by grant guidelines while limiting the impact to future budgets. The most recent fiscal year, 2022, also reflects an increase from May to June forecast but is offset by an increase to the Capital Nonrecurring Account request from 1% to 2%.

To illustrate, a special education student could move into the District in mid-year and the cost impact could be over \$100,000 and/or we could have a 'bad claims year' and wipe out the Self Insurance Reserve Fund and need other funds to cover claims of current employees and retirees. If we do not have available funds to cover these and other potential shortfalls, the necessity to seek additional funding from the public would be our only option (as only the towns have a fund balance from prior years available to use in the case of an emergency).

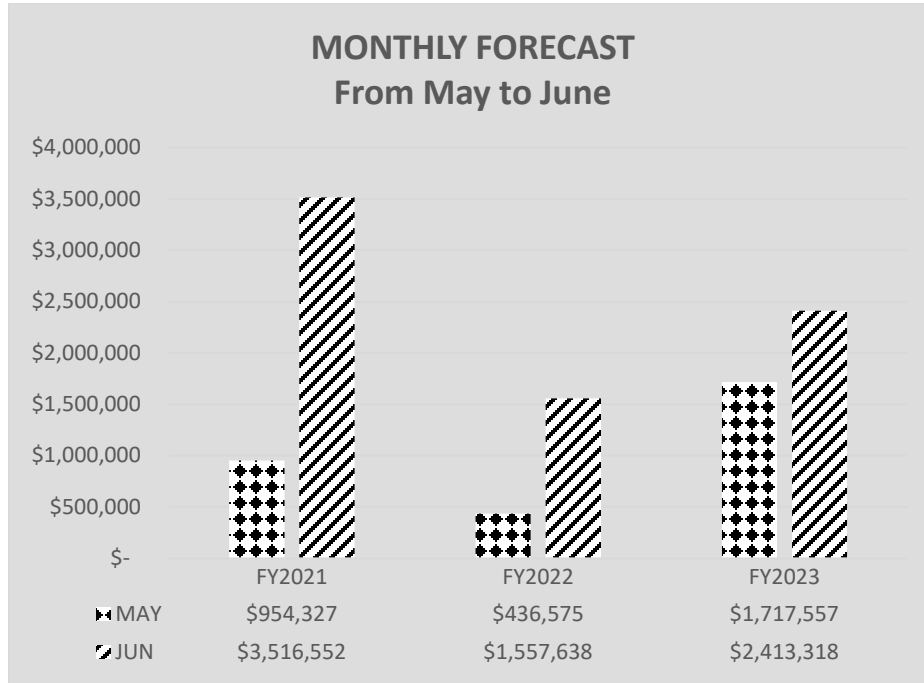
Revenues can be most impacted by decisions made at the State level for Special Education and Transportation grants. We have seen the reimbursement rate change in mid-year.

Prudent financial management is necessary. We need to be sure the total expenditures budget is never overspent (and may need to be underspent if revenues are below budget because total expenditures cannot exceed total revenues). It is imperative we 'hold back' on spending any of the Contingency Account until it is absolutely necessary or we are close to yearend. The Superintendent of Schools and Director of Finance and Administration review and approve or deny all purchase orders. We are careful to make sure funds are only spent when necessary and not just because 'it is in the budget'. We are constantly faced with the 'what-ifs' of over expenditures in certain accounts. We need to be sure there are sufficient funds available. As a result, the fund balance has been larger towards the end of the fiscal year.

Furthermore, the monthly forecasts are based on the information available. We have had large, unexpected or highly unpredictable events at the end of the fiscal year (mostly of a positive nature), which significantly changed the forecast from May to June.

HISTORICAL:

The chart below depicts the yearend balance projected in May and June of each of the past three fiscal years.



The major contributors of the significant change from the May to June forecasts are detailed below.

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 \$628,463. ***This surplus from prior year was credited to the member towns March payment for FY23.*** 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 **\$1,121,063 higher than the prior month's forecast including the increase from 1% to 2% to CNR.** The major reasons for the increase in the yearend fund balance from one month to the next month were, as follows:

- **\$102,543:** Certified and classified salaries were lower than forecasted. It is not until the end of the fiscal year when we know the actual expenditures for coverages, substitutes, leaves of absences, overtime, and pay docks. Many unpaid leaves occur at the end of the school year. We use conservative estimates in the forecasts based on past history. Overtime and substitute needs are greatest in the final months of the school year due to many extracurricular activities. We hired more in-house substitutes to offset outside agency costs and it proved to be effective.
- **\$33,278:** Medical insurance claims and associated costs were \$27,846 lower than expected. Since we are self-insured, actual claims are not known until the end of the fiscal year. Payroll taxes, life insurance and defined contribution payments were less based on vacant positions.
- **\$344,647** Purchased services were lower than forecasted. This included \$57,363 lower transportation and rental costs for athletics. Transportation needs are partially determined by a team's advancement in tournament play during the year and are difficult to gauge. Athletics rentals of all weather fields at other location for teams' practice experience was not needed and other facility rentals were lower than anticipated. Special education transportation and tuition were also \$259,748 lower due to unexpected changes in outplacements, fewer unanticipated services than budgeted and unfilled positions in the department.
- **\$83,850:** Electrical and water consumption was lower than anticipated. Instructional supplies were less than anticipated.

- **(\$516,982) Capital and Nonrecurring (CNR) Account:** The positive variances above were offset by increasing the CNR request from 1% to 2% based on new information regarding the carrying over of fund balances. The Board approved \$929,175 or 1.80% in August 2022.

FY2023:

The audited fund balance is \$1,372,878 with an allocation of 2% or \$1,066,995 appropriated to Capital and Nonrecurring Account . The monthly forecast for May 2023 projected a fund balance of \$650,562. The change is **\$740,761 higher than the prior month's forecast**. The major reasons for the increase in the yearend fund balance from one month to the next month were, as follows:

- **\$142,314:** Certified and classified salaries were lower due to the staff turnover and vacancies impacting the District all year. Current staff covered additional classes, additional substitutes and consultants were hired to cover vacant positions.
- **\$141,038** Purchased services were over budget but less than anticipated. Outside consultants were contracted to provide some services for the vacant positions but not to the extent expected. Legal services and athletic services were less than anticipated.
- **\$146,772:** There continued to be changes in special education transportation needs and the final number of athletic trips was less than anticipated.
- **\$80,178:** Repairs and maintenance costs were down with the bulk being from snow removal being nearly \$30,000 under budget.
- **\$28,861:** Communication costs were lower due to savings from the E-rate grant and less postage needed due to the digital communications.
- **\$45,780:** Renewals for insurance policies due in June came in under budget including student accident and cyber insurance. Steps the District has taken to improve its digital security has resulted in lower premiums.
- **\$93,482:** Special Education tuition charges were less than budgeted due to changes in students's services and/or attendance in programs.

APPENDIX C

RECAP OF 2020-2021

Return Unspent Fund Balance:

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

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

The audited fund balance for 2020-2021 is \$2,483,748 after designating \$187,600 for items cut from the FY22 budget, \$339,360 for end of year purchases (security and technology) and \$507,844 approved for capital nonrecurring account. These source of the available funds are described below.

FINANCIAL MANAGEMENT:

\$ 578,763

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

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

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

SPECIAL EDUCATION:

\$1, 078,971

These accounts are extremely difficult to forecast. As examples, special need students can be hospitalized; move into the district or leave the district at any time; withdraw from Amity and enroll in Adult Education. Several students who were budgeted to be outplaced were not for a number of reasons. Some transportation needs were coordinated with the elementary districts to reduce the number of singletons on busses for outplacements. Any one of these events can have a significant impact, positive or negative, on the District's special education expenditures. The Director of Pupil Services has been successful in establishing suitable programs for students within the District and a number of students have returned from outplacement. Transportation budget was \$488,891 FAV and the tuition budget was \$240,380 FAV.

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

OTHER: **\$ 1,858,818**

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

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

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

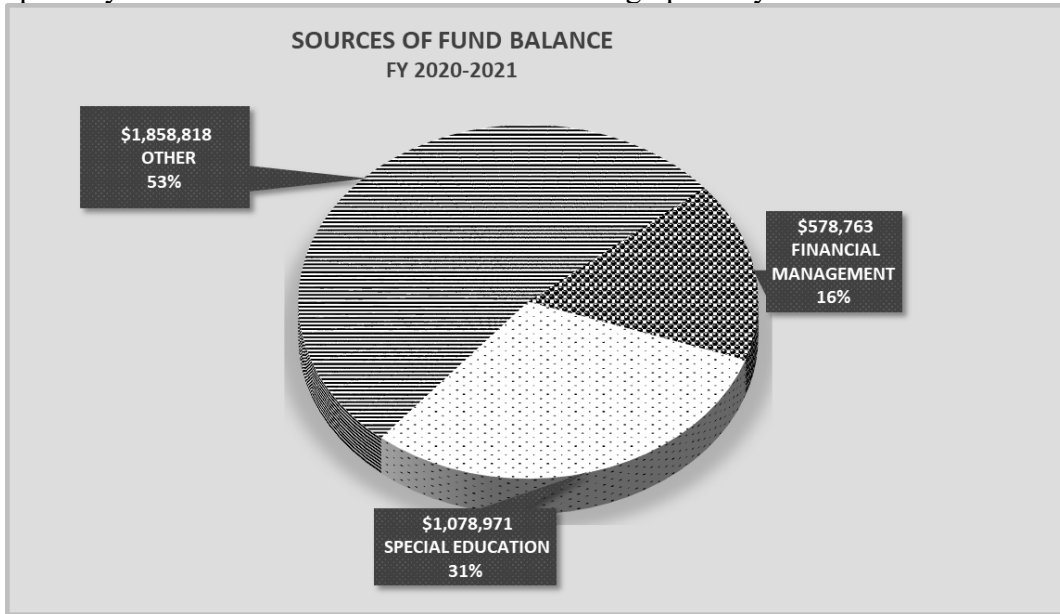
\$111,272 UTILITIES (OTHER): The buildings did not operate under full capacity for most of the year and there were no building rentals, limited evening activities and many more outside events.

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

\$96,312 STAFF TRAVEL, CONFERENCES AND DUES & FEES (OTHER): Staff travel was not necessary with remote options and many in-person conferences cancelled. Mileage payments for staff traveling between buildings and travel and accommodations for out of District travel were not needed during the school year. Less entry fees for athletics also reduced fees.

Some of these savings were offset by COVID purchases.

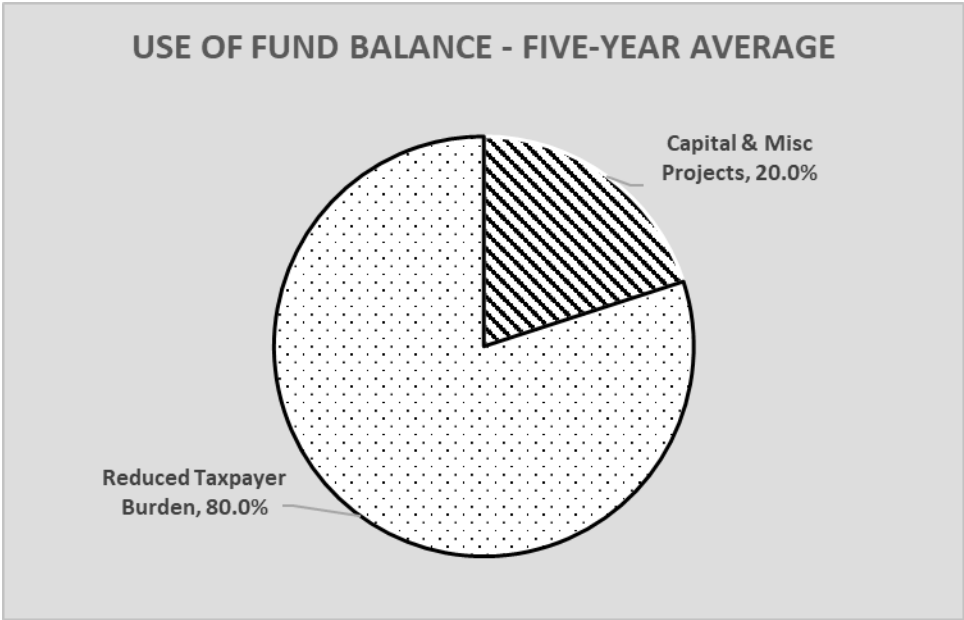
The primary sources of the fund balance are shown graphically below:



The use of the fund balance was designated as follows:

1. **\$187,600** was designated in items removed from the 21-22 budget
2. **\$339,360** was designated for security and technology items eligible for grant reimbursement.
3. **\$507,844** approved for capital nonrecurring projects to offset future budgets.
4. **\$2,483,748** - Return of unspent fund balance upon audit completion.

The uses of the fund balance are shown graphically below:



Return Unspent Fund Balance:

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

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

APPENDIX D

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.

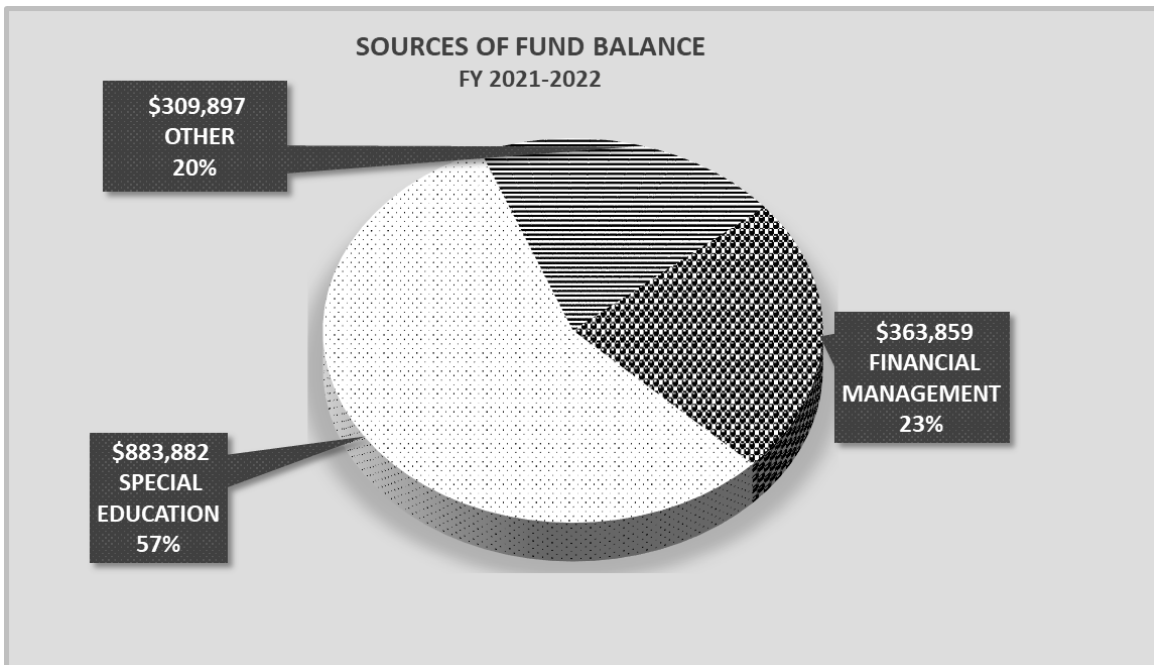
\$18,429 PURCHASED SERVICES (OTHER): Other purchased services accounts were under budget collectively by \$8,666 due to less printed materials and catered events. Data processing was under budget by \$9,763 as the administration consolidated onboarding software options at a reduced cost.

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

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

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

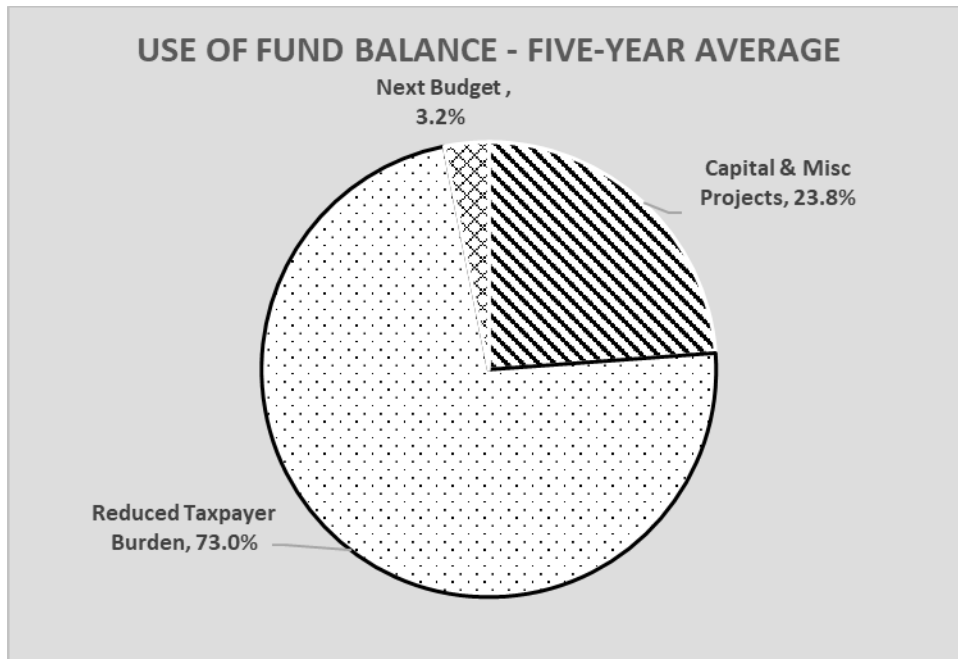
The primary sources of the fund balance are shown graphically below:



The use of the fund balance is proposed as follows:

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

The uses of the fund balance are shown graphically below:



Carry Over Funds:

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

APPENDIX E

RECAP OF 2022-2023

Unspent Encumbrances Balance:

The cancellation of 2021-2022 encumbrances of \$47,518 will be added to the fund balance credited to the member towns in March of 2024. 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 2022-2023 is \$1,372,878 plus \$1,066,995 designated for capital non-recurring projects. The source of the available funds are described below.

FINANCIAL MANAGEMENT:

\$ 352,350

Our efforts to foster a District culture of finding cost savings and efficiencies has been successful producing savings of \$42,565. Grant money was applied for and awarded to offset the cost of the CEN and cameras for the lecture hall for savings of \$31,565. At least \$11,000 of maintenance work done by in-house staff rather than hiring contractors. The District saved \$43,242 on insurances by bidding contracts and implementing additional security measures to obtain a more favorable premium for cyber insurance. The long range planning of replacing HVAC units and VFD's and the decreased number of instructional computer labs has had a favorable impact on the electricity usage of \$117,857. Instructional and custodial supplies were underspent by \$82,210 combined as staff only requested what was needed. Repairs and maintenance costs were lower due to excellent preventative maintenance and in-house repairs by \$50,000.

SPECIAL EDUCATION :

\$ 1,764,799

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 variety of reasons including moving out of the District or returning to District programs. 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. Programs established in FY22 for the middle school and its counterpart for the high school in the FY23 school year help keep out of district costs down. The Districts receives revenue directly correlated to special education services and that revenue decreased by \$294,610 which is not reflected above.

OTHER:

\$ 322,724

\$466,620 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 number of 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 long

period of time despite our recruitment efforts. 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. The District was not fully staffed the entire year and the many vacancies resulted in a surplus, \$676,158. 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, (\$241,695) and some funds remained unspent.

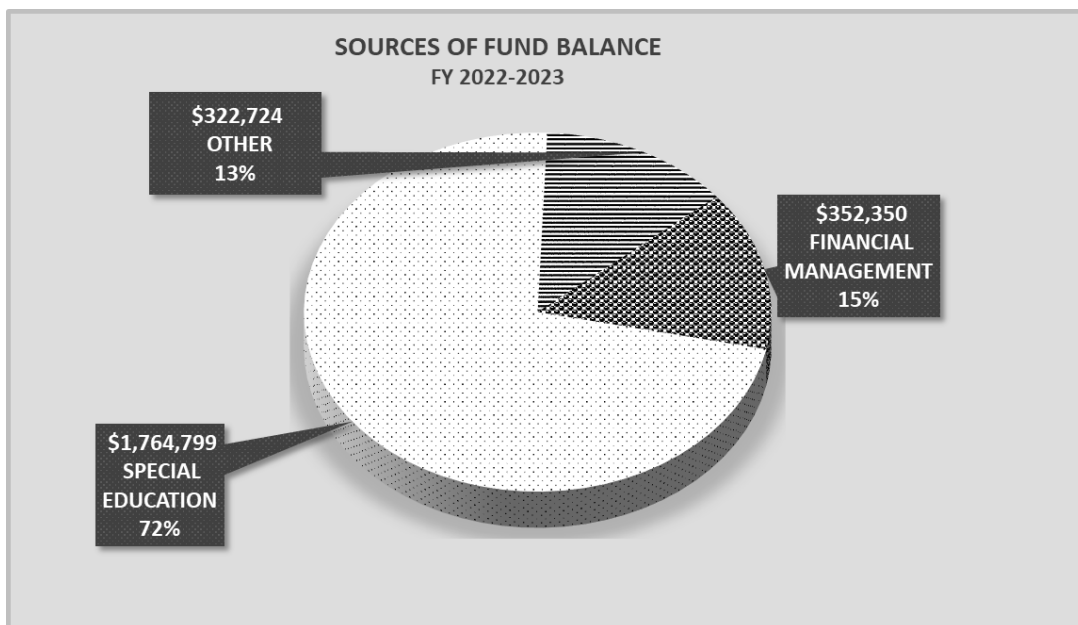
\$103,184 MEDICAL: The medical account was under budget \$103,184 due to the high staff turnover.

\$29,875 REPAIRS AND MAINTENANCE: Snow removal was under budget \$29,875 due to a mild winter.

\$41,328 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.

(\$294,783) UNPLANNED EXPENSES: The savings noted above were offset by unplanned expenses. The OPEB trust was fully funded to restore the original budget request as recommended by the actuaries, \$111,758; Unemployment costs were \$20,825 higher than anticipated and purchases for new security cameras and the required software to utilize the cameras, a new burnisher, scoreboard, replacing obsolete robots for the robotics program, and a new auto lift account for \$162,200 additional purchases.

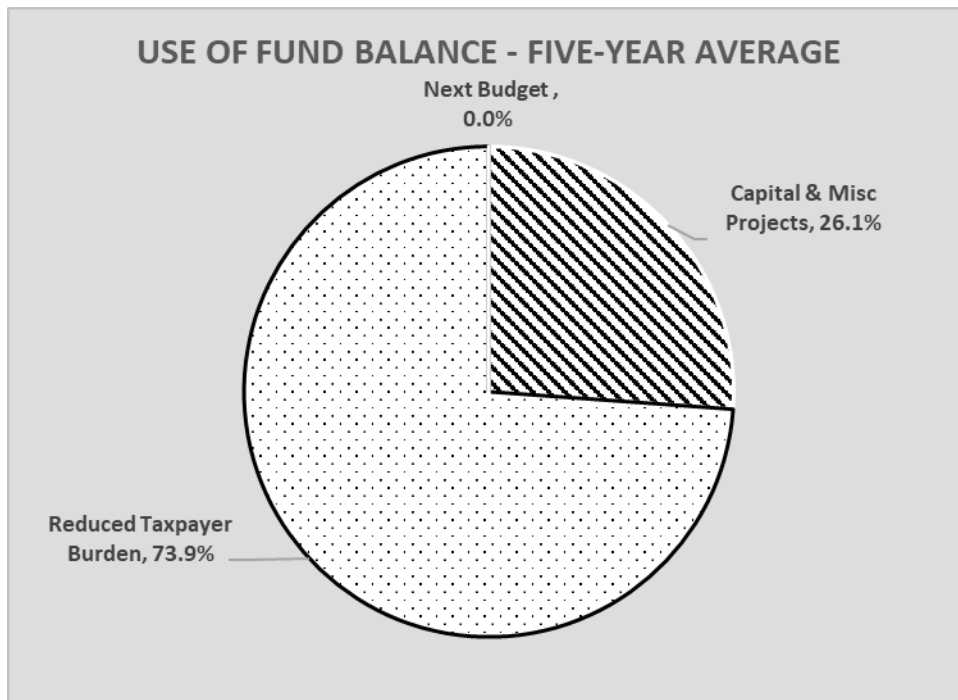
The primary sources of the fund balance are shown graphically below:



The use of the fund balance is proposed as follows:

1. **\$1,066,995 - 2.0%** approved for designation to Capital Nonrecurring Reserve
2. **\$1,372,878** – Credit of unspent fund balance to member towns upon audit completion in March 2024.

The uses of the fund balance are shown graphically below:



Unspent Funds:

The Board of Education approved 2.0% or \$1,066,995 of the FY23 surplus transferred to the Capital Nonrecurring Reserve. The audited balance is \$1,372,878. The FY22 unspent encumbrances of \$47,518 and unspent funds from FY23 will be credited to the member towns March payment in 2024.

Amity Regional School District No. 5 - Budget Transfers 2023-2024

MONTH/YR	JNL#	ACCOUNT NUMBER & DESCRIPTION	AMOUNT	DESCRIPTION
JUL				
Jul-23	6	1 -03-14-2600-5420 REPAIRS,MAINTENANCE & CLEANING	\$ (415.00)	SchoolDude Software Price Inc
Jul-23	6	1 -05-14-2660-5695 TECHNOLOGY SUPPLIES	\$ 415.00	SchoolDude Software Price Inc
Jul-23	104	1 -02-11-1006-5641 TEXTBOOKS	\$ 910.00	World Language Workbooks
Jul-23	104	1 -02-11-1006-5611 INSTRUCTIONAL SUPPLIES	\$ (910.00)	World Language Workbooks
AUG				
SEPT				
Sep-23	99	1 -02-13-2400-5420 REPAIRS,MAINTENANCE & CLEANING	\$ 200.00	REPAIR OF WALKIE TALKIES
Sep-23	99	1 -02-13-2400-5590 OTHER PURCHASED SERVICES	\$ (200.00)	REPAIR OF WALKIE TALKIES
Sep-23	104	1 -03-14-2600-5613 MAINTENANCE/CUSTODIAL SUPPLIES	\$ (929.00)	File Cabinet
Sep-23	104	1 -05-14-2600-5731 EQUIPMENT - REPLACEMENT	\$ 929.00	File Cabinet
Sep-23	110	1 -05-13-2212-5111 CERTIFIED SALARIES	\$ (150.00)	ISTE
Sep-23	110	1 -05-13-2212-5810 DUES & FEES	\$ 150.00	ISTE
Sep-23	120	1 -01-14-2350-5732 EQUIPMENT-TECHNOLOGY-NEW	\$ (800.00)	Price Adjustments
Sep-23	120	1 -01-14-2350-5695 TECHNOLOGY SUPPLIES	\$ 800.00	Price Adjustments
Sep-23	120	1 -02-14-2350-5732 EQUIPMENT-TECHNOLOGY-NEW	\$ (800.00)	Price Adjustments
Sep-23	120	1 -02-14-2350-5695 TECHNOLOGY SUPPLIES	\$ 800.00	Price Adjustments
Sep-23	122	1 -05-13-2213-5322 INSTRUCTIONAL PROG IMPROVEMENT	\$ (405.00)	PD MS Social Studies text
Sep-23	122	1 -05-13-2212-5322 INSTRUCTIONAL PROG IMPROVEMENT	\$ 405.00	PD MS Social Studies text
Sep-23	135	1 -02-14-2350-5695 TECHNOLOGY SUPPLIES	\$ (800.00)	media program supplies/software
Sep-23	135	1 -01-14-2350-5695 TECHNOLOGY SUPPLIES	\$ 800.00	media supply/software
OCT				
Oct-23	19	1 -01-13-2220-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (114.00)	CLC Membership Dues
Oct-23	19	1 -01-13-2220-5810 DUES & FEES	\$ 114.00	CLC Membership Dues
Oct-23	21	1 -02-13-2220-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (114.00)	CLC Membership Dues
Oct-23	21	1 -02-13-2220-5810 DUES & FEES	\$ 114.00	CLC Membership Dues
Oct-23	36	1 -03-11-1014-5810 DUES & FEES	\$ 5.00	Cover CT SS dues increase
Oct-23	36	1 -03-11-1014-5611 INSTRUCTIONAL SUPPLIES	\$ (5.00)	Cover CT SS dues increase
Oct-23	38	1 -03-11-1006-5810 DUES & FEES	\$ 150.00	CTCOLT conference
Oct-23	38	1 -03-11-1006-5641 TEXTBOOKS	\$ (150.00)	CTCOLT conference
Oct-23	41	1 -03-13-2220-5642 LIBRARY BOOKS & PERIODICALS	\$ (17.00)	Transfer to cover dues
Oct-23	41	1 -03-13-2220-5810 DUES & FEES	\$ 17.00	Transfer to cover dues
NOV				
Nov-23	14	1 -04-12-2151-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (1,500.00)	PMT TRAINING FOR STAFF
Nov-23	14	1 -04-13-2190-5581 TRAVEL - CONFERENCES	\$ 1,500.00	PMT TRAINING FOR STAFF
Nov-23	15	1 -04-12-6110-5560 TUITION EXPENSE	\$ (1,102.00)	ECA TUITION
Nov-23	15	1 -04-12-6117-5560 TUITION EXPENSE	\$ 1,102.00	ECA TUITION
DEC				
Dec-23	26	1 -03-11-1007-5611 INSTRUCTIONAL SUPPLIES	\$ (113.00)	service call culinary fryer
Dec-23	26	1 -03-11-1007-5420 REPAIRS,MAINTENANCE & CLEANING	\$ 113.00	service call culinary fryer
Dec-23	27	1 -02-11-1013-5611 INSTRUCTIONAL SUPPLIES	\$ (556.00)	PURCHASE GOGGLE SANITIZING CAB
Dec-23	27	1 -02-11-1013-5731 EQUIPMENT - REPLACEMENT	\$ 556.00	PURCHASE GOGGLE SANITIZING CAB
Dec-23	33	1 -02-14-2600-5613 MAINTENANCE/CUSTODIAL SUPPLIES	\$ (971.00)	washer/dryer replacement
Dec-23	33	1 -02-14-2600-5731 EQUIPMENT - REPLACEMENT	\$ 971.00	washer/dryer replacement
Dec-23	162	1 -02-13-2400-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (100.00)	WALKIE TALKIE REPAIR
Dec-23	162	1 -02-13-2400-5420 REPAIRS,MAINTENANCE & CLEANING	\$ 100.00	WALKIE TALKIE REPAIR
JAN				
Jan-24	34	1 -05-13-2212-5590 OTHER PURCHASED SERVICES	\$ (1,590.00)	Speaker at PD Suzanne Dailey
Jan-24	34	1 -05-13-2213-5322 INSTRUCTIONAL PROG IMPROVEMENT	\$ 1,590.00	Speaker at PD Suzanne Dailey
Jan-24	36	1 -05-13-2212-5322 INSTRUCTIONAL PROG IMPROVEMENT	\$ (155.00)	Speaker at PD Suzanne Dailey
Jan-24	36	1 -05-13-2213-5322 INSTRUCTIONAL PROG IMPROVEMENT	\$ 155.00	Speaker at PD Suzanne Dailey
Jan-24	43	1 -01-13-2120-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (1,662.00)	BLUES & BEYOND/SEWING STORIES
Jan-24	43	1 -01-11-1014-5611 INSTRUCTIONAL SUPPLIES	\$ (398.00)	BLUES & BEYOND/SEWING STORIES
Jan-24	43	1 -01-13-2400-5590 OTHER PURCHASED SERVICES	\$ (176.00)	BLUES & BEYOND/SEWING STORIES
Jan-24	43	1 -01-11-1014-5330 OTHER PROFESSIONAL & TECH SRVC	\$ 2,236.00	BLUES & BEYOND/SEWING STORIES
Jan-24	85	1 -02-11-1013-5690 OTHER SUPPLIES	\$ 608.00	TO PURCHASE DESK CHAIRS
Jan-24	85	1 -02-11-1013-5611 INSTRUCTIONAL SUPPLIES	\$ (608.00)	TO PURCHASE DESK CHAIRS
Jan-24	110	1 -02-13-2220-5611 INSTRUCTIONAL SUPPLIES	\$ (76.00)	ALA Regular membership Dues
Jan-24	110	1 -02-13-2220-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (86.00)	ALA Regular membership Dues
Jan-24	110	1 -02-13-2220-5810 DUES & FEES	\$ 162.00	ALA Regular membership Dues
Jan-24	120	1 -02-13-2400-5690 OTHER SUPPLIES	\$ (180.00)	2ND MONITOR FOR OFFICE/SEC.OFF
Jan-24	120	1 -02-14-2350-5695 TECHNOLOGY SUPPLIES	\$ 180.00	2ND MONITOR FOR OFFICE/SEC.OFF
Jan-24	121	1 -03-11-1007-5611 INSTRUCTIONAL SUPPLIES	\$ (1,063.00)	\$ needed for new fryer-culinar

Amity Regional School District No. 5 - Budget Transfers 2023-2024

<u>MONTH/YR</u>	<u>JNL#</u>	<u>ACCOUNT NUMBER & DESCRIPTION</u>	<u>AMOUNT</u>	<u>DESCRIPTION</u>
Jan-24	121	1 -03-11-1007-5730 EQUIPMENT - NEW	\$ 1,063.00	\$ needed for new fryer-culinar
Jan-24	122	1 -03-11-1013-5611 INSTRUCTIONAL SUPPLIES	\$ (1,063.00)	Food Science Equipment
Jan-24	122	1 -03-11-1013-5730 EQUIPMENT - NEW	\$ 1,063.00	Food Science Equipment
Feb				
Feb-24	15	1 -01-11-1009-5611 INSTRUCTIONAL SUPPLIES	\$ (55.00)	ADD. MATHCOUNTS REGRISTRATION
Feb-24	15	1 -01-11-1009-5810 DUES & FEES	\$ 55.00	ADD. MATHCOUNTS REGRISTRATION
Feb-24	41	1 -01-11-1010-5611 INSTRUCTIONAL SUPPLIES	\$ (1,000.00)	Expand Keyboard Collection
Feb-24	41	1 -01-11-1010-5730 EQUIPMENT - NEW	\$ 1,000.00	Expand Keyboard Collection
Feb-24	42	1 -01-14-2700-5510 PUPIL TRANSPORTATION	\$ (3.00)	SCI. FIELD TRIP TRANSPORTATION
Feb-24	42	1 -01-11-1013-5510 PUPIL TRANSPORTATION	\$ 3.00	SCI. FIELD TRIP TRANSPORTATION
Feb-24	43	1 -02-13-2220-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (625.00)	Social Studies speaker/assembl
Feb-24	43	1 -02-11-1014-5330 OTHER PROFESSIONAL & TECH SRVC	\$ 625.00	Social Studies speaker/assembl
Feb-24	68	1 -03-11-1017-5611 INSTRUCTIONAL SUPPLIES	\$ (893.34)	computer repair in Mac lab
Feb-24	68	1 -03-11-1017-5420 REPAIRS,MAINTENANCE & CLEANING	\$ 893.34	computer repair in Mac lab
Feb-24	114	1 -01-11-1010-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (189.00)	Renewed vision online software
Feb-24	114	1 -01-14-2350-5695 TECHNOLOGY SUPPLIES	\$ 189.00	Renewed vision online software
Feb-24	138	1 -03-14-2600-5420 REPAIRS,MAINTENANCE & CLEANING	\$ (2,385.00)	Hungerfords Pumps
Feb-24	138	1 -03-14-2600-5613 MAINTENANCE/CUSTODIAL SUPPLIES	\$ 2,385.00	Hungerfords Pumps
Feb-24	176	1 -04-12-1203-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (2,952.00)	STAFF TRAVEL
Feb-24	176	1 -04-12-1206-5581 TRAVEL - CONFERENCES	\$ 2,952.00	STAFF TRAVEL
Feb-24	179	1 -03-11-1010-5810 DUES & FEES	\$ (416.00)	Lighting Rental for Musicfest
Feb-24	179	1 -03-11-1010-5330 OTHER PROFESSIONAL & TECH SRVC	\$ 416.00	Lighting Rental for Musicfest
Mar				
Mar-24	8	1 -03-11-1011-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (95.00)	Classroom instructional supply
Mar-24	8	1 -03-11-1011-5611 INSTRUCTIONAL SUPPLIES	\$ 95.00	Classroom instructional supply
Mar-24	49	1 -03-14-2600-5613 MAINTENANCE/CUSTODIAL SUPPLIES	\$ (2,385.00)	AMSB Pump Corrected transfer
Mar-24	49	1 -01-14-2600-5420 REPAIRS,MAINTENANCE & CLEANING	\$ 2,530.00	AMSB Pump Corrected transfer
Mar-24	49	1 -03-14-2600-5420 REPAIRS,MAINTENANCE & CLEANING	\$ (145.00)	AMSB Pump Corrected transfer
Mar-24	52	1 -04-12-2150-5611 INSTRUCTIONAL SUPPLIES	\$ (9.00)	COST OF SHIPPING
Mar-24	52	1 -04-12-2150-5690 OTHER SUPPLIES	\$ 9.00	COST OF SHIPPING
Mar-24	53	1 -03-13-2220-5690 OTHER SUPPLIES	\$ 0.70	AHS-Media Subscriptions
Mar-24	53	1 -03-13-2220-5611 INSTRUCTIONAL SUPPLIES	\$ (0.70)	AHS-Media Subscriptions
Mar-24	53	1 -05-14-2310-5810 DUES & FEES	\$ 338.00	CABE Conferences
Mar-24	53	1 -05-14-2310-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (338.00)	CABE Conferences
Mar-24	54	1 -01-14-2219-5611 INSTRUCTIONAL SUPPLIES	\$ (14.00)	SCIENCE BOOK ORDER
Mar-24	54	1 -01-11-1006-5641 TEXTBOOKS	\$ 14.00	SCIENCE BOOK ORDER
Mar-24	58	1 -03-11-1001-5581 TRAVEL - CONFERENCES	\$ (500.00)	from travel to repairs replace
Mar-24	58	1 -03-11-1001-5420 REPAIRS,MAINTENANCE & CLEANING	\$ 500.00	part need for pugmill
Mar-24	59	1 -03-11-1001-5810 DUES & FEES	\$ (40.00)	fromdues to repairs for replac
Mar-24	59	1 -03-11-1001-5420 REPAIRS,MAINTENANCE & CLEANING	\$ 40.00	part for pugmill-clay mix
Mar-24	60	1 -03-11-1001-5810 DUES & FEES	\$ (220.00)	no longer needed for duesfees
Mar-24	60	1 -03-11-1001-5611 INSTRUCTIONAL SUPPLIES	\$ 220.00	need for instructional supply
Mar-24	92	1 -03-11-1013-5611 INSTRUCTIONAL SUPPLIES	\$ (1,200.00)	need classroom set of texts
Mar-24	92	1 -03-11-1013-5641 TEXTBOOKS	\$ 1,200.00	need classroom set of texts
Mar-24	125	1 -03-11-1005-5810 DUES & FEES	\$ (600.00)	xfer for instructional supplies
Mar-24	125	1 -03-11-1005-5611 INSTRUCTIONAL SUPPLIES	\$ 600.00	xfer for instructional supplies
Mar-24	129	1 -03-11-1008-5810 DUES & FEES	\$ (530.00)	need supplies for competition
Mar-24	129	1 -03-11-1008-5611 INSTRUCTIONAL SUPPLIES	\$ 530.00	need supplies for competition
Mar-24	152	1 -02-11-1010-5810 DUES & FEES	\$ (151.00)	PURCHASE SUPPLIES
Mar-24	152	1 -02-11-1010-5611 INSTRUCTIONAL SUPPLIES	\$ 151.00	PURCHASE SUPPLIES
Mar-24	155	1 -04-12-1207-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (950.00)	SOCIAL WORKERS ATTENDING NASW
Mar-24	155	1 -04-13-2140-5581 TRAVEL - CONFERENCES	\$ 950.00	SOCIAL WORKERS ATTENDING NASW
Mar-24	162	1 -04-12-2150-5810 DUES & FEES	\$ (37.00)	REDUCE DUES AND FEES
Mar-24	162	1 -04-12-2150-5690 OTHER SUPPLIES	\$ 37.00	SUPPLIES NEEDED FOR SLP'S
Mar-24	169	1 -02-13-2400-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (250.00)	CHAIR RENTAL - MOVING UP
Mar-24	169	1 -02-13-2400-5440 RENTALS-LAND,BLDG,EQUIPMENT	\$ 250.00	CHAIR RENTAL - MOVING UP
Mar-24	170	1 -03-11-1009-5641 TEXTBOOKS	\$ (2,500.00)	Supplies to support new instru
Mar-24	170	1 -03-11-1009-5611 INSTRUCTIONAL SUPPLIES	\$ 2,500.00	Supplies to support new instru
Mar-24	171	1 -02-14-2350-5695 TECHNOLOGY SUPPLIES	\$ (90.00)	TO PURCHASE LAPEL MICROPHONES
Mar-24	171	1 -02-11-1010-5611 INSTRUCTIONAL SUPPLIES	\$ 90.00	TO PURCHASE LAPEL MICROPHONES
Mar-24	174	1 -01-13-2400-5590 OTHER PURCHASED SERVICES	\$ (401.00)	Broken chair in security booth
Mar-24	174	1 -01-13-2400-5731 EQUIPMENT - REPLACEMENT	\$ 401.00	Broken chair in security booth

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



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

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

To: Jennifer Byars, Ed. D., Superintendent of Schools
From: Theresa Lumas, Director of Finance and Administration
Re: Budget Transfers over \$3,000 for FY 2023-2024
Date: April 1, 2024

Facilities:

Mr. Martoni is requesting five transfers to cover the costs of repairs to the sump pump drain line at Amity Middle School - Bethany, a new floor scrubber machine, a new restroom cleaning machine, and a replacement door for Amity Middle School - Bethany.

The first transfer is to repair the leaking sump pump line at Amity Middle School - Bethany at \$6,200. This repair also requires excavation work to access the discharge line of the sump pump at \$7,500.

A floor scrubber at the high school is failing and needs replacing. The machine is used multiple times daily and is critical to the cleaning team and schedule at the high school. The new machine is \$16,000, per consortium bid pricing, and a more reliable brand than the current machine. The custodial department will repair the current machine to extend its use as a secondary and backup machine.

The head custodian at Amity Middle School-Orange has requested a restroom room cleaning machine. The other two schools each have one of these machines and it saves time cleaning the restrooms. The machine costs \$5,500 on consortium bid pricing.

There is a request to cover the purchase of interior door for the gymnasium at Amity Middle School – Bethany. One door of the two doors at a gym entrance is broken and not repairable. The replacement door is \$3,400.

The last request is for replacement vacuum cleaners at Amity Middle School -Orange. The request is to purchase 2 backpack and 3 upright vacuum cleaners to replace broken and aging equipment.

Motions:

For the Amity Finance Committee:

Recommend the Amity Board of Education approve...

For the Amity Board of Education:

Move to approve –

the following four budget transfers for facilities

or individually-

For the Amity Finance Committee:

Recommend the Amity Board of Education approve...

For the Amity Board of Education:

Move to approve –

the following budget transfer to cover the cost of excavation and sump pump discharge line repair at Amity Middle School - Bethany.

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
05-14-2600-5715	Contingency-Facilities	\$13,700	
01-14-2600-5420	Repair & Maintenance		\$13,700

the following budget transfer to cover the cost of a floor scrubber machine at the high school.

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
03-14-2600-5613	Custodial Supplies	\$16,000	
03-14-2600-5731	Equipment-Replacement		\$16,000

the following budget transfer to cover the cost of a restroom cleaning machine for Amity Middle School – Orange.

02-14-2600-5613	Custodial Supplies	\$5,500	
02-14-2600-5730	Equipment-New		\$5,500

the following budget transfer to cover the cost of a gymnasium door for Amity Middle School – Bethany.

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
03-14-2600-5613	Custodial Supplies	\$3,400	
03-14-2600-5731	Equipment-Replacement		\$3,400

the following budget transfer to cover the purchase of 2 backpack and 3 upright vacuum cleaners for Amity Middle School – Orange.

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
02-14-2600-5420	Custodial Supplies	\$3,300	
02-14-2600-5731	Equipment-Replacement		\$3,300

Technology:

This budget transfer request is to consolidate all the technology account into the district wide account to prioritize purchases for the rest of the year. Purchases will include security cameras, upgrades to hard drives for additional memory on security cameras, keyboards for the high school music class and wireless projectors for the art wing at the high school. The list of accounts will be provided at the meetings after general ordering closes on Friday and the remaining balances will be identified.

Motions:

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

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

Accounts will be provided at the meeting, exact accounts and amounts are still under review at time of print

Q3 FY24 CNR

ORG	OBJ	ACCOUNT DESCRIPTION	ORIGINAL APPROP	TRANFRS/ADJSMTS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCE/REQ	AVAILABLE BUDGET	% USED
00150047	5720	IMPROV-SIT	3,067,849	293,257	3,361,106	3,345,352.22	7,200.00	8,554	99.70
00150047		Total 00150047 Athletics Facility P	3,067,849	293,257	3,361,106	3,345,352.22	7,200.00	8,554	99.70
00150048	5715	IMPROV-BLD	1,830,630	234,042	2,064,672	2,064,671.70	0.00	0	100.00
00150048		Total 00150048 HVAC AHS 2020 BOND	1,830,630	234,042	2,064,672	2,064,671.70	0.00	0	100.00
00150049	5715	IMPROV-BLD	140,000	100,906	240,906	240,906.00	0.00	0	100.00
00150049		Total 00150049 CHILLERS REFURBISH A	140,000	100,906	240,906	240,906.00	0.00	0	100.00
00150050	5715	IMPROV-BLD	600,000	-46,640	553,360	532,032.66	0.00	21,327	96.15%
00150050		Total 00150050 PAVING AHS	600,000	-46,640	553,360	532,032.66	0.00	21,327	96.15%
00150051	5330	PROF&TECH	108,018	-39,156	68,862	68,862.12	0.00	0	100.00
00150051		Total 00150051 BOND CLOSING COSTS	108,018	-39,156	68,862	68,862.12	0.00	0	100.00
00150052	5715	IMPROV-BLD	245,000	-164,390	80,610	80,610.00	0.00	0	100.00
00150052		Total 00150052 ACOUSTICAL IMPROVEME	245,000	-164,390	80,610	80,610.00	0.00	0	100.00
00150053	5715	IMPROV-BLD	587,453	-365,641	221,812	96,044.00	0.00	125,768	43.30
00150053		Total 00150053 2020 Bond Contingenc	587,453	-365,641	221,812	96,044.00	0.00	125,768	43.30
00150054	5715	IMPROV-BLD	495,482	0	495,482	420,826.68	0.00	74,655	84.90
00150054		Total 00150054 AHS ROOF REPLACEMENT	495,482	0	495,482	420,826.68	0.00	74,655	84.90
00150055	5715	IMPROV-BLD	110,000	395,948	505,948	504,924.48	1,024.00	0	100.00
00150055		Total 00150055 LECTURE HALL RENOVAT	110,000	395,948	505,948	504,924.48	1,024.00	0	100.00
00150060	5420	REP,MAINT	100,000	0	100,000	42,296.00	0.00	57,704	42.30
00150060		Total 00150060 LIGHTING PROJECT	100,000	0	100,000	42,296.00	0.00	57,704	42.30
00150061	5731	EQUIP-REPL	190,075	0	190,075	0.00	190,074.24	1	100.00
00150061		Total 00150061 MUSIC INSTRUMENTS	190,075	0	190,075	0.00	190,074.24	1	100.00
00150062	5715	IMPROV-BLD	331,500	66,143	397,643	397,643.00	0.00	0	100.00
00150062		Total 00150062 AMSB ROOF PROJECT	331,500	66,143	397,643	397,643.00	0.00	0	100.00
00150063	5715	IMPROV-BLD	382,000	108,748	490,748	459,690.00	31,058.00	0	100.00
00150063		Total 00150063 AMSO ROOF PROJECT	382,000	108,748	490,748	459,690.00	31,058.00	0	100.00
00150064	5420	REP,MAINT	35,000	0	35,000	0.00	0.00	35,000	0.00
00150064		Total 00150064 AHS ALL WEATHER FIEL	35,000	0	35,000	0.00	0.00	35,000	0.00
00150065	5715	IMPROV-BLD	1,066,995	766,741	1,833,736	22,665.50	54,709.50	1,756,361	4.22%
00150065		Total 00150065 AHS LMC RENOVATION	1,066,995	766,741	1,833,736	22,665.50	54,709.50	1,756,361	4.22%
00150099	5899	UNDESIGNAT	65,243	19,949	85,192	0.00	0.00	85,192	0.00
00150099		Total 00150099 UNDESIGNATED	65,243	19,949	85,192	0.00	0.00	85,192	0.00
Grand Total			9,355,245	1,369,907	10,725,152	8,276,524	284,066	2,164,562	79.82%

Q3 FY24 GRANT

ORG	OBJ	ACCOUNT DESCRIPTION	ORIGINAL APPROP	TRANFRS/ADJSMTS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCE/REQ	AVAILABLE BUDGET	% USED
00008969	100	SALARIES	76,611	-1,793	74,819	43,791.17	23,162.54	7,865	89.50
00008969	300	PROFESSION	14,840	5,230	20,071	16,208.33	0.00	3,862	80.80
00008969	500	OTHER PURC	3,438	-3,438	0	0.00	0.00	0	0.00
00008969	600	SUPPLIES	0	0	0	0.00	0.00	0	0.00
00008969	700	PROPERTY	0	0	0	0.00	0.00	0	0.00
00008969		Total 00008969 ARP ESSER 2020-2024	94,889	0	94,889	59,999.50	23,162.54	11,727	87.60
00008977	111B	TEACH SAL	0	0	0	0.00	0.00	0	0.00
00008977	111NP	TEACH NP	0	0	0	0.00	0.00	0	0.00
00008977	200	MEDICARE	0	0	0	0.00	0.00	0	0.00
00008977	322	INSTR PROG	0	0	0	0.00	0.00	0	0.00
00008977	600	SUPPLIES	0	0	0	0.00	0.00	0	0.00
00008977	734	tech hard	0	0	0	0.00	0.00	0	0.00
00008977		Total 00008977 ARP IDEA 21-23	0	0	0	0.00	0.00	0	0.00
00008978	111B	TEACH SAL	0	0	0	0.00	0.00	0	0.00
00008978	200	MEDICARE	0	0	0	0.00	0.00	0	0.00
00008978	321	TUTORS	0	0	0	0.00	0.00	0	0.00
00008978		Total 00008978 SPED RECOVERY ACTIVI	0	0	0	0.00	0.00	0	0.00
00008979	111B	TEACH SAL	0	0	0	0.00	0.00	0	0.00
00008979	322	INSTR PROG	2,793	0	2,793	2,792.54	0.00	0	100.00
00008979		Total 00008979 SPECIAL POPULATIONS	2,793	0	2,793	2,792.54	0.00	0	100.00
00008980	321	TUTORS	0	0	0	0.00	0.00	0	0.00
00008980		Total 00008980 DYSLEXIA RECOVERY	0	0	0	0.00	0.00	0	0.00
00008984	5590	PURCH SVCS	3,076	0	3,076	2,315.25	0.00	761	75.30
00008984		Total 00008984 ARP ESSER HCY	3,076	0	3,076	2,315.25	0.00	761	75.30
00008985	5330	PROF&TECH	3,447	0	3,447	1,547.00	0.00	1,900	44.90
00008985	5715	IMPROV-BLD	34,072	-10,000	24,072	9,316.58	0.00	14,755	38.70
00008985	5720	IMPROV-SIT	26,000	0	26,000	26,000.00	0.00	0	100.00
00008985	5730	EQUIP-NEW	768	10,000	10,768	10,452.93	0.00	315	97.10
00008985	5731	EQUIP-REPL	10,000	0	10,000	791.94	0.00	9,208	7.90
00008985		Total 00008985 FEMA COVID-19	74,287	0	74,287	48,108.45	0.00	26,179	64.80
00008988	5899	UNDESIGNAT	580	0	580	9.89	0.00	571	1.70
00008988		Total 00008988 CAC FY23	580	0	580	9.89	0.00	571	1.70
00008990	100	SALARIES	14,581	0	14,581	14,580.71	0.00	0	100.00
00008990	200	MEDICARE	20,347	0	20,347	20,347.00	0.00	0	100.00
00008990	600	SUPPLIES	1,000	0	1,000	1,000.00	0.00	0	100.00
00008990		Total 00008990 TITLE I 2022-2024	35,928	0	35,928	35,927.71	0.00	0	100.00
00008991	100	SALARIES	16,290	0	16,290	0.00	0.00	16,290	0.00
00008991	300	PROFESSION	10,809	0	10,809	7,442.08	1,865.00	1,502	86.10
00008991	500	OTHER PURC	1,640	0	1,640	1,640.00	0.00	0	100.00
00008991		Total 00008991 TITLE II 2022-2024	28,739	0	28,739	9,082.08	1,865.00	17,792	38.10
00008992	100	SALARIES	10,000	0	10,000	10,000.00	0.00	0	100.00
00008992		Total 00008992 TITLE IV 2022-2024	10,000	0	10,000	10,000.00	0.00	0	100.00
00008993	300	PROFESSION	1,000	0	1,000	306.25	693.75	0	100.00

Q3 FY24 GRANT

ORG	OBJ	ACCOUNT DESCRIPTION	ORIGINAL APPROP	TRANFRS/ADJSMTS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCE/REQ	AVAILABLE BUDGET	% USED
00008993	600	SUPPLIES	1,207	0	1,207	1,207.49	0.00	0	100.00
00008993		Total 00008993 TITLE III 2022-2024	2,207	0	2,207	1,513.74	693.75	0	100.00
00008994	100	SALARIES	16,695	0	16,695	16,694.66	0.00	0	100.00
00008994	111NP	TEACH NP	500	-500	0	0.00	0.00	0	0.00
00008994	112	SALARIES N	98,628	0	98,628	98,627.67	0.00	0	100.00
00008994	200	MEDICARE	37,145	0	37,145	37,145.00	0.00	0	100.00
00008994	321	TUTORS	6,500	0	6,500	6,402.50	0.00	98	98.50
00008994	322	INSTR PROG	2,500	4,000	6,500	6,318.40	0.00	182	97.20
00008994	324	FIELD TRIP	12,000	-4,000	8,000	5,471.10	0.00	2,529	68.40
00008994	325	PARENT ACT	500	0	500	16.09	0.00	484	3.20
00008994	440	RENTALS (L	4,500	0	4,500	4,500.00	0.00	0	100.00
00008994	600	SUPPLIES	4,867	0	4,867	2,238.52	80.61	2,548	47.60
00008994	600NP	SUPPLY NP	2,490	500	2,990	2,242.50	0.00	747	75.00
00008994	734	tech hard	750	0	750	750.00	0.00	0	100.00
00008994		Total 00008994 IDEA FY 2022-2024	187,074	0	187,074	180,406.44	80.61	6,587	96.50
00008996	5899	UNDESIGNAT	9,490	0	9,490	9,489.60	0.00	0	100.00
00008996		Total 00008996 OPEN CHOICE FY23	9,490	0	9,490	9,489.60	0.00	0	100.00
00008998	111A	ADMIN SAL	0	150	150	150.00	0.00	0	100.00
00008998	111B	TEACH SAL	0	0	0	0.00	0.00	0	0.00
00008998	322NP	INSTR NP	750	0	750	375.00	375.00	0	100.00
00008998		Total 00008998 CT-SEDS FY23	750	150	900	525.00	375.00	0	100.00
00008999	700	PROPERTY	59,706	0	59,706	59,706.00	0.00	0	100.00
00008999		Total 00008999 PEGPETIA GRANT FY23	59,706	0	59,706	59,706.00	0.00	0	100.00
00009002	600	SUPPLIES	7,210	0	7,210	0.00	0.00	7,210	0.00
00009002	700	PROPERTY	0	0	0	0.00	0.00	0	0.00
00009002		Total 00009002 Science Research Awa	7,210	0	7,210	0.00	0.00	7,210	0.00
00009003	5899	UNDESIGNAT	10,864	8,944	19,808	3,411.86	0.00	16,396	17.20
00009003		Total 00009003 MEDICAID GRANT	10,864	8,944	19,808	3,411.86	0.00	16,396	17.20
00009004	5899	UNDESIGNAT	370	0	370	0.00	0.00	370	0.00
00009004		Total 00009004 PRESCRIPTION DRUG SA	370	0	370	0.00	0.00	370	0.00
00009005	5899	UNDESIGNAT	16,661	1,355	18,016	1,080.97	0.00	16,935	6.00
00009005		Total 00009005 CBITS SUSTAINABILITY	16,661	1,355	18,016	1,080.97	0.00	16,935	6.00
00009030	5899	UNDESIGNAT	30,010	48,975	78,985	27,057.87	10,497.13	41,430	47.50
00009030		Total 00009030 OPEN CHOICE FY24	30,010	48,975	78,985	27,057.87	10,497.13	41,430	47.50
00009031	100	SALARIES	26,166	0	26,166	19,283.17	17,960.80	-11,078	142.30
00009031	300	PROFESSION	25,762	0	25,762	0.00	0.00	25,762	0.00
00009031	600	SUPPLIES	26,000	0	26,000	0.00	0.00	26,000	0.00
00009031		Total 00009031 TITLE I 2023-2025	77,928	0	77,928	19,283.17	17,960.80	40,684	47.80
00009032	100	SALARIES	16,409	0	16,409	0.00	0.00	16,409	0.00
00009032	300	PROFESSION	11,653	0	11,653	0.00	0.00	11,653	0.00
00009032	500	OTHER PURC	1,640	0	1,640	0.00	0.00	1,640	0.00
00009032		Total 00009032 TITLE II 2023-2025	29,702	0	29,702	0.00	0.00	29,702	0.00
00009033	300	PROFESSION	1,000	0	1,000	0.00	0.00	1,000	0.00

Q3 FY24 GRANT

ORG	OBJ	ACCOUNT DESCRIPTION	ORIGINAL APPROP	TRANFRS/ADJSMTS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCE/REQ	AVAILABLE BUDGET	% USED
00009033	600	SUPPLIES	1,226	0	1,226	0.00	0.00	1,226	0.00
00009033		Total 00009033 TITLE III 2023-2025	2,226	0	2,226	0.00	0.00	2,226	0.00
00009034	100	SALARIES	10,000	0	10,000	6.79	0.00	9,993	0.10
00009034		Total 00009034 TITLE IV 2023-2025	10,000	0	10,000	6.79	0.00	9,993	0.10
00009035	100	SALARIES	66,378	0	66,378	16,898.70	17,784.72	31,695	52.30
00009035	112	SALARIES N	375,274	-37,145	338,129	133,215.23	74,916.49	129,997	61.60
00009035	200	MEDICARE	37,145	0	37,145	0.00	0.00	37,145	0.00
00009035	322	INSTR PROG	807	0	807	0.00	0.00	807	0.00
00009035	324	FIELD TRIP	10,000	0	10,000	0.00	0.00	10,000	0.00
00009035	325	PARENT ACT	500	0	500	0.00	0.00	500	0.00
00009035	580	TRAVEL-STA	4,500	0	4,500	0.00	0.00	4,500	0.00
00009035	600	SUPPLIES	4,702	0	4,702	0.00	0.00	4,702	0.00
00009035	600NP	SUPPLY NP	1,672	0	1,672	0.00	0.00	1,672	0.00
00009035	734	tech hard	500	0	500	0.00	0.00	500	0.00
00009035		Total 00009035 IDEA FY 2023-2025	501,477	-37,145	464,332	150,113.93	92,701.21	221,517	52.30
00009036	5899	UNDESIGNAT	7,119	0	7,119	5,555.73	0.00	1,563	78.00
00009036		Total 00009036 CAC FY24	7,119	0	7,119	5,555.73	0.00	1,563	78.00
00009037	100	SALARIES	24,875	0	24,875	0.00	0.00	24,875	0.00
00009037	300	PROFESSION	6,250	0	6,250	0.00	2,750.00	3,500	44.00
00009037	500	OTHER PURC	9,000	0	9,000	0.00	0.00	9,000	0.00
00009037	600	SUPPLIES	19,875	0	19,875	0.00	0.00	19,875	0.00
00009037		Total 00009037 ARAP-DUAL CREDIT EXP	60,000	0	60,000	0.00	2,750.00	57,250	4.60
00009038	100	SALARIES	56,211	-1,627	54,584	25,143.42	17,921.52	11,519	78.90
00009038	200	MEDICARE	12,000	0	12,000	0.00	0.00	12,000	0.00
00009038	600	SUPPLIES	1,627	0	1,627	1,627.00	0.00	0	100.00
00009038		Total 00009038 ARPA-SCHOOL MENTAL H	69,838	-1,627	68,211	26,770.42	17,921.52	23,519	65.50
00009039	5732	EQ-TECH-N	74,433	0	74,433	0.00	0.00	74,433	0.00
00009039		Total 00009039 EMERGENCY CONNECTIVI	74,433	0	74,433	0.00	0.00	74,433	0.00
00009040	111B	TEACH SAL	507	0	507	0.00	0.00	507	0.00
00009040	330	OTHER PROF	1,550	0	1,550	1,150.00	358.00	42	97.30
00009040	510	TRANSPORTA	1,450	0	1,450	0.00	0.00	1,450	0.00
00009040	580	TRAVEL-STA	4,000	0	4,000	3,143.00	0.00	857	78.60
00009040	600	SUPPLIES	21,088	0	21,088	20,805.60	0.00	282	98.70
00009040	700	PROPERTY	16,698	0	16,698	16,697.86	0.00	0	100.00
00009040		Total 00009040 CARL PERKINS FY24	45,293	0	45,293	41,796.46	358.00	3,139	93.10
Grand Total			1,452,650	20,652	1,473,302	694,953.40	168,365.56	609,983	58.60

Personnel – Certified/Non-Certified

Increasing Educator Diversity Plan

~~Personnel – Certified/Non-Certified Minority Recruitment Plan~~

The Amity Regional School District No. 5 (ARSD) Board of Education (Board) recognizes that fundamental to a quality education is the need to provide students with an opportunity to interact with students and educators from different racial, ethnic, and economic backgrounds.

The Board believes that a skillful and diverse staff contributes significantly to high quality, engaging learning environments, predicated on a climate of inclusion. To this end the Board directs the Superintendent to enact a planning process for the recruitment of a diverse staff.

The plan must provide students with opportunities to interact with teachers from diverse backgrounds. The plan must be submitted to the Commissioner of Education for review and approval. The approved plan must be posted on the district website.

(cf. 4111 – Recruitment and Selection)

- Legal Reference: Connecticut General Statutes
- 10-4a(3) Educational interests of state identified.
 - 10-151 Employment of teachers. Notice and hearing on termination of contract.
 - 10-153 Discrimination on account of marital status.
 - 10-220(a) Duties of Boards of Education. (as amended by PA 18-34).
 - 46a- 60 Discriminatory employment practices prohibited.
 - PA 16-41 An Act Concerning the Recommendations of the Minority Teacher Recruitment Task Force.
 - PA 18-34 An Act Concerning Minority Teacher Recruitment and Retention.
 - PA 19-74 An Act Concerning Minority Teacher Recruitment and Retention.
 - PA 23-167 An Act Concerning Transparency in Education**

Bylaws of the Board

Committees

The Board of Education (Board) shall act as a committee of the whole on all matters coming before it except that committees may be created by vote of the Board for the consideration or investigation of certain matters, or for the performance of certain Board functions.

1. Committees

a. Standing Committees

The Board may create standing committees. Any standing committee shall remain in effect indefinitely or until such time as the committee is abolished by the Board.

b. Ad Hoc Committees

Ad hoc committees may be established by the Board with a fixed objective and for a limited period of time. The Board shall take formal action to dissolve such committees when their stated purposes have been carried out and/or the services of the committee are no longer required.

2. Scope of Authority

A committee’s only authority is to make recommendations to the Board regarding matters that have been referred to it, unless the Board specifically authorizes otherwise; however, the Board cannot delegate the powers granted it under the State Statutes to such committees.

3. Committee Membership

The Board Chairperson shall appoint the members of all committees, and the Board Chairperson shall also appoint a Chairperson for each committee. The Board Chairperson may serve as ex-officio member of any standing or ad hoc committee. As ex-officio, the Chairperson can vote but cannot count as part of a quorum.

To more effectively meet quorum requirements, all committees of the Board shall have an odd number of members. The exception to this shall be the Amity Finance Committee, which will operate in accordance with Bylaw 9132.6.

4. Meetings and Reports

a. Meetings of committees shall be posted as required by the Freedom of Information Act. Minutes of each posted committee meeting shall be prepared.

b. Committees shall submit their recommendations and/or reports at meetings of the Board.

5. Electronic Committee Meetings

Bylaws of the Board

Committees

The Board recognizes that due to the schedule, time, frequency and content of committees, committee meetings may be best accomplished through a meeting by electronic means. The decision to conduct a committee meeting electronically shall be determined by mutual consensus between the committee chair and the school personnel who serve on the committee. In the event that a committee meets by electronic means, the following shall be adhered to:

- a. All members of the committee shall meet by electronic means. A hybrid meeting is not permissible.
- b. Committee members shall make every attempt to participate through a technology portal where they can be viewable, or at a minimum heard, by each other and members of the public.
- c. Notice of the committee meeting's virtual location shall be published through the traditional means and outlets as well as being noticed on the District (ARSD) website and in the Board of Education Office no less than 48 hours in advance.
- d. ARSD shall post the agenda for the committee meeting no later than 24 hours in advance for review and reference by members of the public. The agenda will also be posted on the ARSD website.
- e. The live public comment portion of the committee meeting shall be temporarily suspended during an electronic meeting. However, members of the public can submit their comments to be added to the public record by emailing the Clerk of the Board of Education prior to 2:00 pm on the day of the meeting. These comments will be summarized by the Committee Chairperson in the place so designated in the agenda for the meeting. The public may also email the Clerk of the Board by 2:00 pm on the day of the meeting and request to speak during public comment as noted on the agenda. Those members of the public making such request will be provided with the information necessary to join the meeting electronically to provide public comment.
- f. ARSD shall provide any member of the public with a physical location and the electronic equipment needed to attend a fully remote meeting in real-time. Members of the public must request this provision by emailing the Clerk of the Board of Education by the close of the last business day before the day of the fully remote meeting.
- g. When a committee meeting is conducted by electronic means, a recording of the meeting with video, in addition to minutes, will be posted. These recordings will not stand as the minutes; only the written record as approved will do so.
- h. The Board shall take the steps necessary for the public to view electronic committee meetings and proceedings in real time.

Bylaws of the Board

Committees

- i. Executive session will not be conducted during an electronic committee meeting.

(cf. 9131 – Committee of the Whole)

(cf. 9132.6 – Amity Finance Committee)

(cf. 9312 – Time, Place, and Notification of Meetings)

Legal Reference: Connecticut General Statutes

1-200 through 1-241 of the Freedom of Information Act 1-200 Definitions

1-225 Meetings of government agencies to be public

Students

Crisis Prevention/Response

The Amity Regional School District No. 5 (District) recognizes that schools are subject to a number of potentially disruptive events. These events include major crises. No school is immune no matter the size or location. The challenge, however, is to protect students as much as possible. While the very nature of a crisis may make preparation difficult, the Board of Education (Board) believes that staff and students should be ready to respond quickly and appropriately to emergency situations. The Board recognizes that all District staff and students must be prepared to respond quickly and responsibly to emergencies, disasters, and threats of disaster. Being prepared for crises can enhance the district's effectiveness in responding to smaller incidents.

Although there is no guarantee that a district (school) will ever be completely safe from crisis, the district will take the appropriate security measures to provide a safe, orderly, civil, and positive learning environment for students, staff, and visitors, including development, implementation, and regular updating of a comprehensive crisis/emergency management plan. Such plans shall be based on the school security and safety plan standards and the accompanying School Security and Safety Plan Template developed by the Department of Emergency Services and Public Protection, pursuant to section 86 of PA 13-3.

In developing the District and school security and safety plans, the Superintendent or their designee shall collaborate closely with law enforcement, fire and emergency services personnel and community partners, including public health and mental health professionals who can assist with the development of a plan that addresses a wide range of crises.

The Superintendent or their designee shall also develop and maintain emergency plans for each school site, with the cooperation of the school's security and safety committee.

The Board shall annually, by November 1st of each year, submit the school security and safety plan for each school to the Department of Emergency Services and Public Protection, via submission to the District's DEMHS Regional Coordinator in the manner prescribed by said agency.

The Board shall grant the use of school buildings, grounds, and equipment to public agencies when requested, for care and shelter during natural disasters or other emergencies affecting the public health and welfare. The Board shall collaborate with such agencies in furnishing and maintaining services they deem necessary to meet the community's needs.

Legal References: Connecticut General Statutes

10-154a Professional communications between teacher or nurse and student.

10-207 Duties of medical advisors.

10-209 Records not to be public.

10-210 Notice of disease to be given parent or guardian.

10-221e Boards of education to prescribe rules.

10-222m - School security and safety plans. School security and safety

Policy Revised:

AMITY REGIONAL SCHOOL DISTRICT NO. 5
Woodbridge, Connecticut

Students

Crisis Prevention/Response

committees

10-222n - School security and safety plan standards

19a-221 Quarantine of certain persons.

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

PA 13-3 An Act Concerning Gun Violence and Children's Safety

The Family Educational Rights and Privacy Act of 1974, (FERPA), 20 U.S.C. 1232g, 45 C.F.R. 99.



AMITY REGIONAL SCHOOL DISTRICT

BETHANY • ORANGE • WOODBRIDGE

25 Newton Road, Woodbridge, Connecticut 06525 (203) 397-4836

Increasing Educator Diversity Plan

March 2024

This comprehensive Increasing Diversity Educator Plan was developed in collaborative partnership with the Bethany, Orange, Woodbridge, and Amity school districts, fostering a collective commitment to promoting inclusivity and embracing diversity within the educational landscape.

Vision

We believe that each student has a right to the unimpeded access to the opportunities and resources necessary to develop to their full academic and social potential and that each individual in our community should have a genuine sense of social, emotional, and academic belonging. We further believe the differences in individual and cultural characteristics, identities, and traits of each person and group in our school and community are valuable and that students are better served when teachers and teacher leaders reflect the diversity of our community.

Our beliefs are consistent with the Connecticut State Board of Education’s equity and excellence goals for all students. “First, that every student deserves to benefit from the promise of high expectations and standards for what they can learn and be able to do. Second, great schools are safe, diverse, welcoming environments where students thrive and receive exceptional teaching and learning. And third, great teachers and leaders are supported throughout their careers with quality professional learning that continues to grow and refine educator practice.”¹

Policies

Public Act No 18-34 and Public Act 23-167 – Increasing Educator Diversity

Currently, boards of education, under Public Act No 18-34², must have a written plan for “minority educator recruitment” to reduce racial, ethnic and economic isolation and

¹ Connecticut State Department of Education et.al. Creating a District Plan to Increase the Racial, Ethnic and Linguistic Diversity of Your Educator Workforce: A Guidebook for Hiring and Selection,” n.d. https://portal.ct.gov/-/media/SDE/Talent_Office/HiringAndSelectionGuidebook.pdf.

² Connecticut General Assembly. An Act Concerning Minority Teacher Recruitment and Retention., Public Act No. 18-34 § (2018). <https://www.cga.ct.gov/2018/ACT/pa/pdf/2018PA-00034-R00SB-00455-PA.pdf>.

provide students with opportunities to interact with teachers from other racial, ethnic, and economic backgrounds. Public Act No 18-34. The Public Act 23-167 changes the plan's name to the "increasing educator diversity" plan and the Act requires that boards of education submit their "increasing educator diversity" plans to the Commissioner of Education for review and approval.³

BOE Policy P4111(a) Personnel – Certified/Non-Certified Recruitment and Selection

The Board recognizes the diversity of the people who live in the school district and believes that this characteristic should have an important bearing on all aspects of the ARSD activities. The Board believes it is especially important that this diversity of population be recognized in the recruitment and assignment of personnel. The Board shall develop and implement a written plan for minority staff recruitment. (May 2021)

BOE Policy P4111.1 Personnel – Certified/Non-Certified Equal Employment Opportunity

The Board of Education (Board) will provide equal employment opportunities for all persons without regard to race, color, religious creed, age, veterans' status, genetic information, marital status, national origin, ancestry, sex, sexual orientation, gender identify or expression, or physical disability. The Board directs the administration to set as a goal the recruitment, selection, and employment of qualified people among racial and ethnic minority groups to the end that the Amity Regional School District No. 5 (ARSD) employees will proportionately mirror the racial and ethnic composition of this community. (Feb 2021)

BOE Policy P4111.3 Personnel – Certified/Non-Certified Minority Recruitment Plan

The Amity Regional School District No. 5 (ARSD) Board of Education (Board) recognizes that fundamental to a quality education is the need to provide students with an opportunity to interact with students and educators from different racial, ethnic, and economic backgrounds. The Board believes that a skillful and diverse staff contributes significantly to high quality, engaging learning environments, predicated on a climate of inclusion. To this end the Board directs the Superintendent to enact a planning process for the recruitment of a diverse staff. (May 2021)

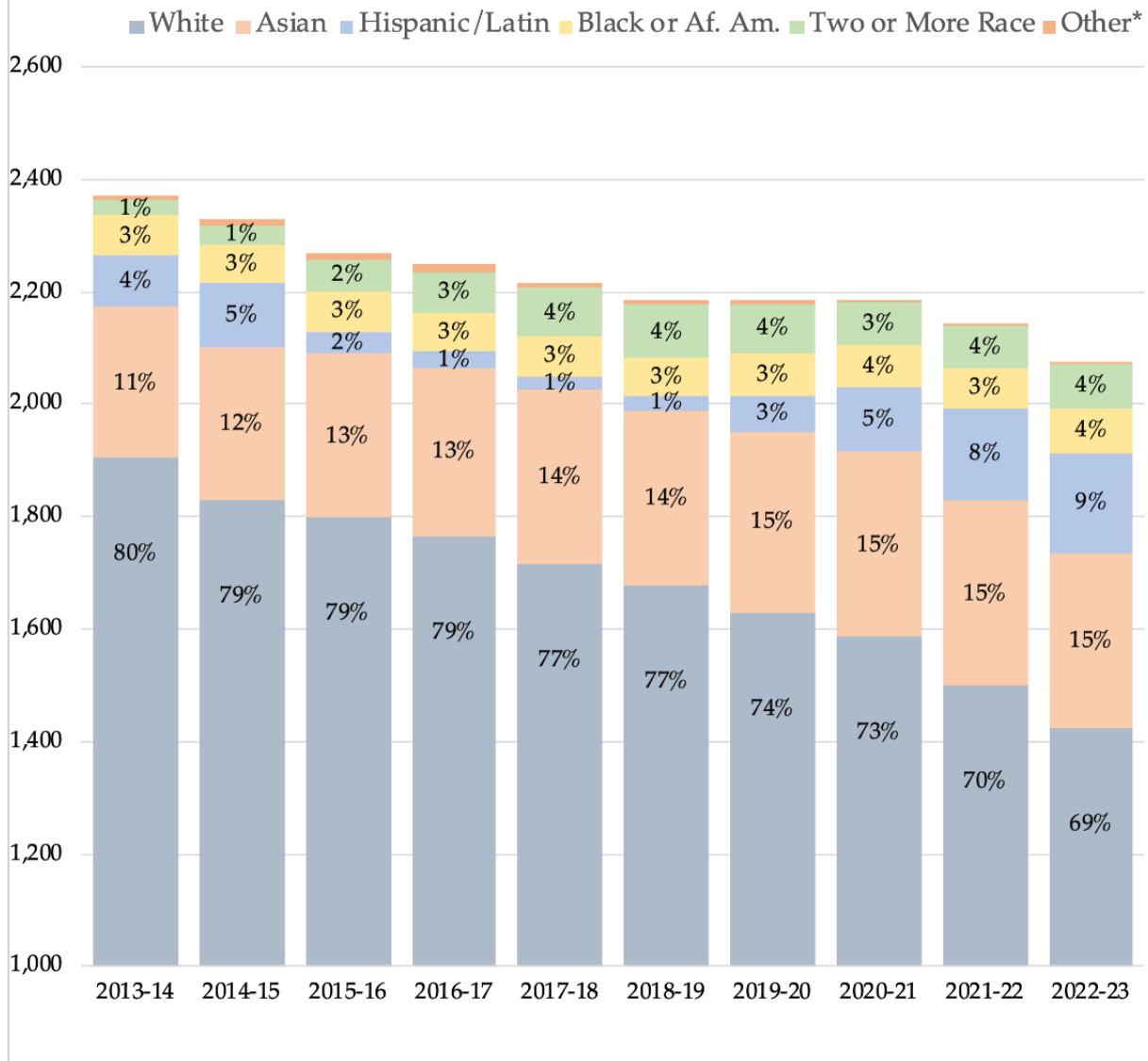
Demographics (STUDENTS /STAFF)

Racial Demographics

In Chart 1.2 you can see a shift in the racial makeup of the district over the last ten years. Again, the Y axis shows the student count and each racial identity block within the column is labeled with the percent of the student body for that specific year. Hispanic and Asian identifying-students had the largest percentage increases. The Hispanic population as grown from 4% to 9% of the student body (an increase of 91%). The Asian population has gone from 11 to 15% of the student body (an increase of 17%). The white population has declined from 80% of the total student count to 69% (a decrease of 25%). Students who identify with two or more races has gone from 1% to 4%. The Black or African American population has remained somewhat steady at 3% or 4% over the last ten years.

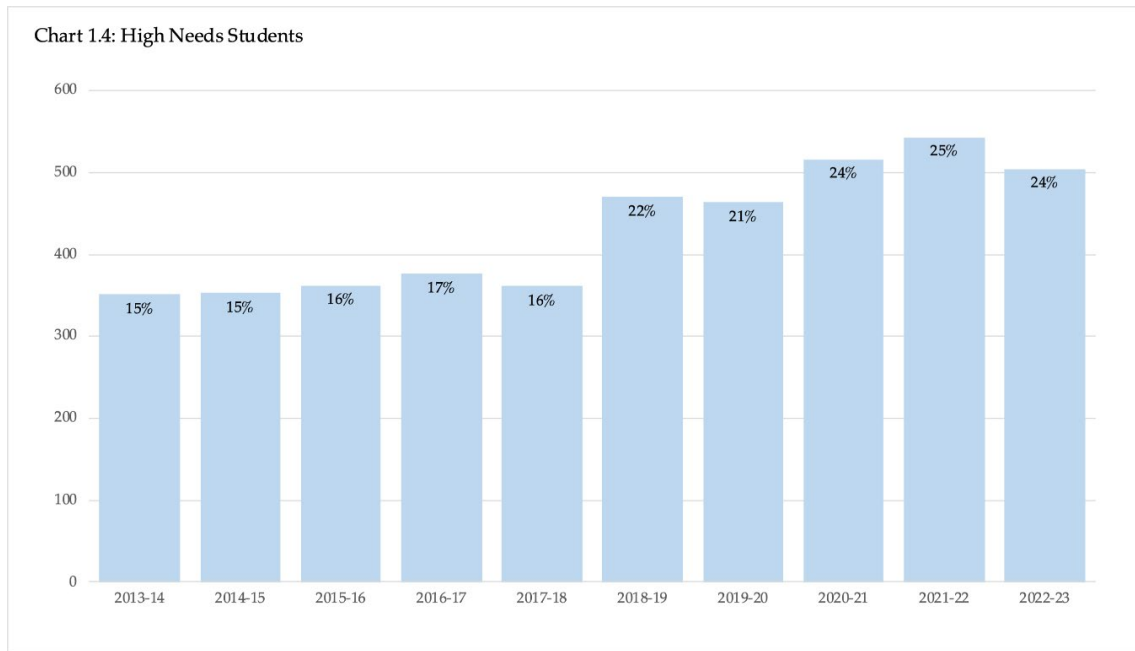
³ Shipman, A, and Goodwin LLP Legislation Summary. "2023 Education Legislation Summary," August 3, 2023. <https://www.shipmangoodwin.com/insights/2023-education-legislation-summary.html>

Chart 1.2: Racial Demographics



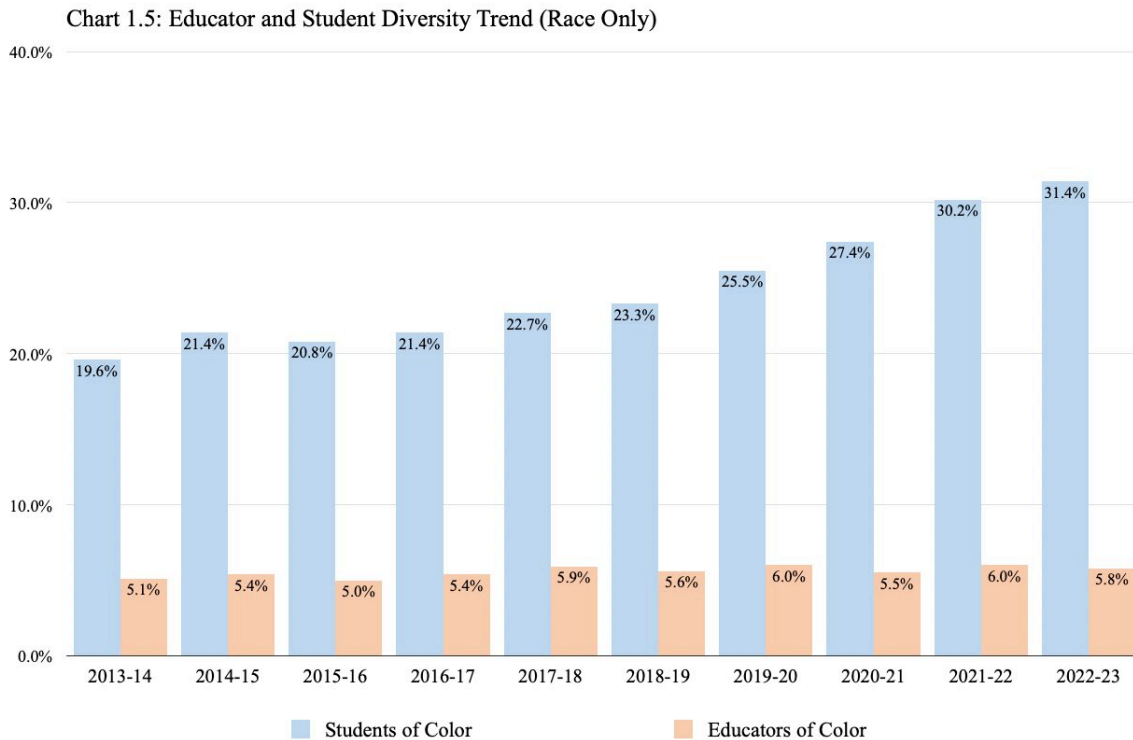
High Needs Students

Chart 1. 4 displays high needs students at all of Amity’s campuses. *High needs* is a category that includes students with disabilities, free and reduced lunch eligibility, and English language learners. The total number of high needs students in the district grew from 351 to 504 (an increase of 43%). As a percentage of the total population, Amity’s high needs students grew from 15% to 25%.

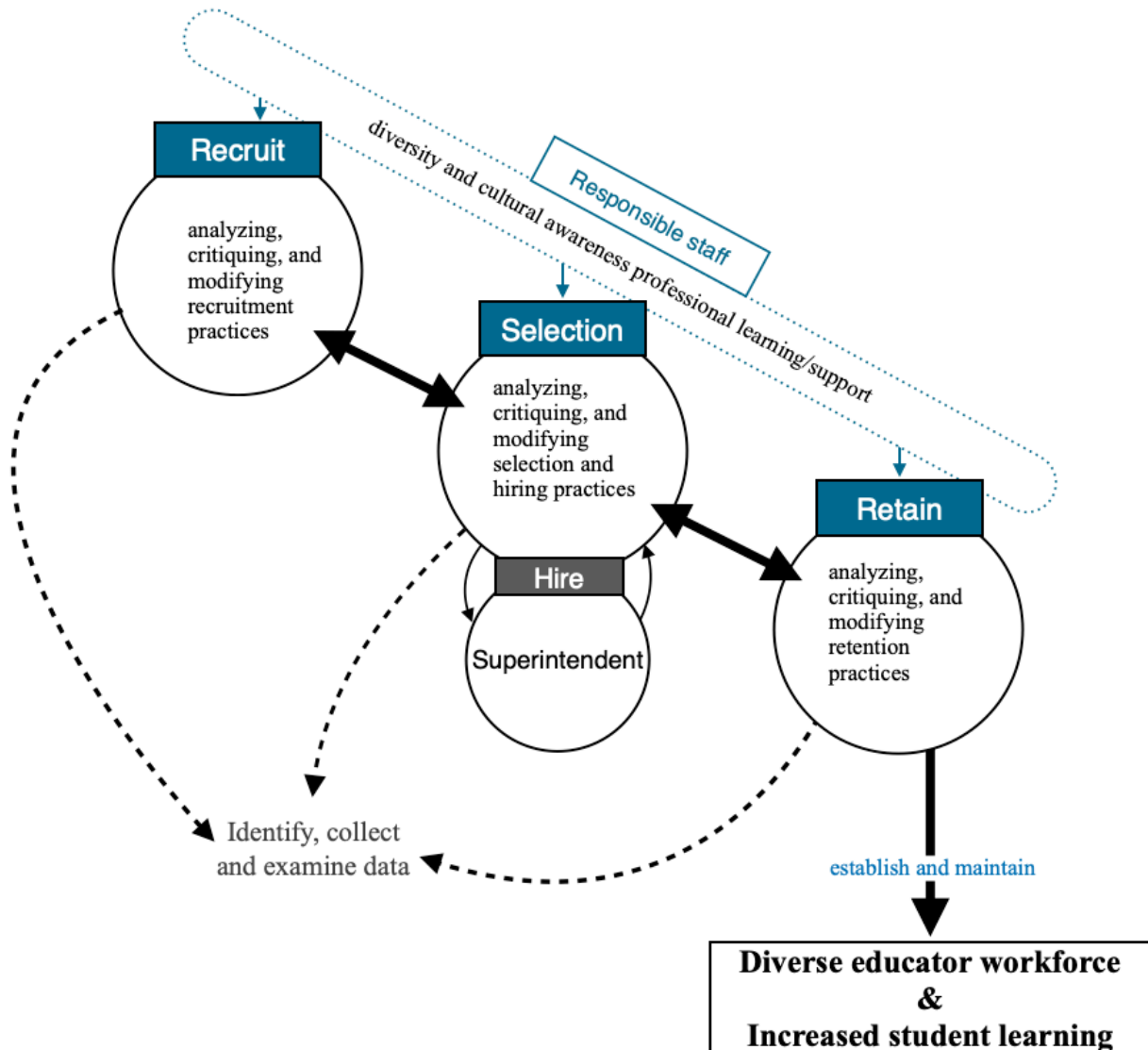


Educator Diversity (Race only)

Chart 1.5 displays a comparison of the educator and student racial diversity ten-year trend. In 2022-23 there were 14 of 240 educators of color which was 5.8% and 651 of 2,075 students of color representing 31.4%, a difference of 25.6%. In 2013-14 there were 12 of 235 educators of color which was 5.1% and 466 of 2,372 students of color representing 19.6%, a difference of 14.5%.



Theory of Action (STRUCTURE - Recruit, Hire and Retain)



If the District proactively engages in researching, establishing, and implementing diverse, inclusive, and equitable hiring and selection practices; continuously analyzes, critiques, and modifies recruitment, selection, and retention practices; and concurrently provides professional learning support to enhance diversity and cultural awareness among responsible staff, then we will witness an increase in the establishment and maintenance of a more diverse educator workforce. This workforce will be reflective of our student population and community, and as a result, prepare our students for an increasingly diverse world.

Structures, Practices, and Strategies

RECRUITMENT GOAL

Beginning in the 2024-2025 school year, we will decrease the gap between diverse students and diverse certified staff by engaging in key strategies to recruit more diverse candidates reflecting the richness of our community and fostering an inclusive and equitable learning environment.

Who Manages the Goal –

Superintendent

Human Resources (HR) Specialist

Diversity Equity and Inclusion (DEI) Instructional Coach

Key Strategies

STRATEGY	RESPONSIBILITY	TIME FRAME
Review the applications for teaching and administrative positions to ensure they are structured to recognize applicant's leadership experiences with diverse groups.	Superintendent, HR Specialist, DEI Instructional Coach	Summer 2024
Utilize the EdSight Secure Educator Diversity Dashboard resources and continue to analyze district data related to recruiting, applications, interviewing and hiring to inform our recruitment planning.	DEI Instructional Coach; DEI Committee	Fall 2024; annually thereafter
Partner with higher education institutions with a proven record for preparing and certifying diverse educators for internships, 5 th year placements, and job recruitment.	Assistant Superintendent; HR Specialist	Spring 2024; annually thereafter
Participate in education career fairs and local job fairs, including those that are sponsored by the racially and ethnically diverse community organizations or otherwise targeted toward underrepresented segments of the community.	HR Specialist, Administrators, Directors	On-going
Form partnerships through Connecticut alumna networks with historically Black colleges and universities and Hispanic-serving institutes to attract diverse candidates.	DEI Instructional Coach; HR Specialist	January 2025; on-going thereafter
Highlight opportunities for growth (tuition assistance) and leadership (Department Chairs, Team Leaders, Content Leaders, Complimentary Observers) in application postings and on website.	HR Specialist	Spring 2024; on-going thereafter
Expand DEI webpage to highlight efforts in the District to improve inclusion and belonging experienced by both students and staff.	DEI Instructional Coach; DEI Committee; Instructional Technology Staff	Summer 2024; on-going thereafter
Implement voluntary applicant surveys to collect demographics on applicants to inform the	DEI Instructional Coach; HR	Winter 2025; on-going thereafter;

effectiveness of the strategies in the Increasing Educator Diversity Plan.	Specialist; DEI Committee	Summer/Fall analysis
Increase opportunities for high school students to earn dual enrollment credits in education, thereby increasing the pipeline of certified educators to recruit.	Assistant Superintendent; Director of School Counseling	Winter 2025 Program of Studies; implement 2025-2026

Indicators of Progress –

- Knowledge of baseline of diversity of applicants
- Participation in career and job fairs
- Additional information on DEI webpage
- Increase in the diversity of applicants from the baseline

Resources –

- Frontline Resources
- EdSight Secure Educator Diversity Dashboard
- Networks with Connecticut colleges and universities
- Contact Information for college and university placement officers and job/career/recruitment fairs
- Connection to alumni networks for HBCUs and other diverse colleges and universities
- Qualtrics or other survey instrument
- Non-affiliated/neutral party for applicant data collection/aggregation

Risks and Mitigation –

- Lack or missed communication with colleges, universities, and career fairs
- Budget reductions impacting ability to hire interns
- Applicant failing to complete voluntary survey
- Data on applicant demographics leaked
- Limited networking opportunities with alumni networks

Consultation and Communication –

- Hiring committee training to explain updates/changes to applications
- Outreach to colleges and universities regarding postings and open positions
- Timeline and outreach process for annual career/job fairs
- Update advertising/recruiting materials
- Applicant survey process reviewed by BOE attorney ensure alignment with EEO
- Confidentiality of applicant survey data communicated to applicants.
- Ongoing updates of DEI website

HIRING AND SELECTION GOAL

Beginning in the 2024-2025 school year, we will decrease the gap between diverse students and diverse certified staff by employing strategic hiring practices to increase diversity of personnel, reflecting the richness of our community and fostering an inclusive and equitable learning environment.

Who Manages the Goal –

Superintendent
Assistant Superintendent
Principals and Directors
Teacher Leaders (Department Chairs, Content Leaders, Team Leaders)
Human Resources (HR) Specialist

Key Strategies

STRATEGY	RESPONSIBILITY	TIME FRAME
Implement a written, collaborative, uniform practices for hiring that minimizes the chance for bias on the part of the hiring committee.	Superintendent, HR Specialist, Trained Interview/Hiring Committees	Spring 2024; annually thereafter
Employ aggressive hiring timelines as identified in the uniform hiring process to avoid missing opportunities to capture educator talent	Superintendent, HR Specialist, Principals, Directors	Spring 2024; annually thereafter
Incorporate questions related to culturally responsive pedagogy into the interview process.	Principals, HR Specialist, Trained Interview/Hiring Committees, DEI Instructional Coach	Spring 2024; annually thereafter
Ensure that interview/hiring committee members have mandatory anti-bias training and information on current student and staff demographics. Training should guard against exclusionary notions of cultural fit and advise that protected statuses should not figure either positively or negatively into employment.	Principals; Directors, HR Specialist, DEI Instructional Coach	Spring 2024; annually thereafter
Collect feedback from new hires and interview/hiring committee members on the inclusivity of the hiring process.	HR Specialist, DEI Instructional Coach	Spring 2025; annually thereafter

Indicators of Progress –

- Increase in the diversity of candidates hired in the district
- Positive feedback from new hires regarding the inclusivity of the hiring process
- Positive feedback from interview/hiring committee teams on the inclusivity of the hiring process
- Updated interview questions related to culturally responsive teaching
- Documented, written hiring processes for all positions in the district

Resources –

- State anti-bias training video
- Develop in-house anti-bias training for interview/hiring committees
- Time and process for training interview/hiring committees
- Frontline Hiring & Recruiting

Risks and Mitigation –

- Limited candidate pool and teaching shortage areas impacting ability to hire diverse staff
- Time to train interview/hiring committees and maintain an aggressive hiring timeline
- Ability to capture qualitative feedback from new hires and hiring/interview committee members
- Unconscious bias impacting applicant screening and interview decisions

Consultation and Communication –

- Train administrators, directors, and teacher leaders on the expectations of uniform hiring practices
- Collaboration to establish a timeline for training interview/hiring committee members
- Follow-up with new hires and interview/hiring committee members either via a survey or open-ended interviews

RETENTION GOAL

Beginning in the 2024-2025 school year, we will decrease the gap between diverse students and diverse certified staff by enhancing staff retention initiatives to ensure the continued presence and success of diverse staff members reflecting the richness of our community and fostering an inclusive and equitable learning environment.

Who Manages the Goal –

Superintendent

Assistant Superintendent

Principals and Directors

Teacher Leaders (Department Chairs, Content Leaders, Team Leaders)

Human Resources (HR) Specialist

Key Strategies

STRATEGY	RESPONSIBILITY	TIME FRAME
Create an education climate that is culturally and linguistically responsive, including policies and practices that support staff of diverse backgrounds.	Superintendent, Principals, Directors, DEI Instructional Coach, Board of Education	On-going
Provide professional learning for certified staff related to implicit bias, culturally relevant pedagogy, and the need for a more diverse workforce.	Assistant Superintendent, DEI Instructional Coach, Principals, Directors	On-going
Provide professional learning for certified staff to develop strategies and skills to support all students in meeting their highest potential.	Assistant Superintendent, Instructional Coaches, Principals, Directors	On-going
At each school and district wide, refine practices and procedures to ensure they are conducive to furthering inclusion and belonging.	Superintendent, Assistant Superintendent, Principals, Directors, Teacher Leaders	On-going
Examine organizational practices, policies, characteristics, and conditions to ensure that they support teacher retention and growth.	Superintendent, Assistant Superintendent, Principals, Directors, Teacher Leaders, TEAM Mentors	On-going
Monitor and address issues linked to educator satisfaction and retention.	Superintendent, Assistant Superintendent, HR Specialist	On-going
Provide mentoring and induction opportunities that are culturally responsive and that enable the development of teacher leaders.	Superintendent, Assistant Superintendent,	On-going

	Teacher Leaders, Instructional Coaches	
Seek professional learning opportunities that address the unique needs and challenges faced by educators from diverse backgrounds.	Assistant Superintendent, DEI Instructional Coach	Summer 2024; on-going thereafter
Implement regular feedback mechanisms to understand the experiences and concerns of diverse educators.	Superintendent, HR Specialist, DEI Instructional Coach	Fall 2024; on-going thereafter
Annually monitor percent of certified minority staff and teacher retention rates.	Superintendent, HR Specialist	Summer 2024; on-going thereafter
Promote networking events to foster a sense of belonging within the greater education community.	Superintendent, Assistant Superintendent, DEI Instructional Coach	Summer 2024; on-going thereafter

Indicators of Progress –

- Knowledge of baseline of reasons teachers leave District/profession.
- Decrease in number of instances in which teachers leave District/profession because of a lack of support for diversity, inclusion, and belonging
- Overall decrease in the number of teachers leaving District/profession (not including retirement)
- Updated policies, procedures, and practices
- Review of feedback from new hires and interview/hiring committee members
- School Climate results (staff)

Resources –

- EdSight Secure Educator Diversity Dashboard
- TEAM (trainings, mentors, process)
- Exit Survey and data (align to educator demographic data in MUNIS)
- School Climate Surveys (for staff)
- Building Leadership Team
- Funding and time for professional learning opportunities
- Funding for and development of a mentorship program for new teachers (outside of TEAM process)

Risks and Mitigation –

- Budget reductions impacting ability to support professional learning
- Limited professional learning opportunities that address the unique needs of diverse educators
- Competing professional learning needs
- Limited networking opportunities
- Limited number of mentors across a variety of content areas

Consultation and Communication –

- Share exit survey data, including open-ended questions and interview feedback, with school and district leaders
- Continue partnerships with RESCs for professional learning such as Igniting Change

- Use School Climate Survey Data (from staff) to set school/District climate goals/improvement for staff
- Actively recruit new TEAM mentors

Commitment to Review

The District Diversity, Equity, and Inclusion Committee will review this plan biennially for effectiveness of strategies.

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