

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 07, 2025 6:30 pm
25 Newton Road, Woodbridge, CT
Lecture Hall

1. **CALL TO ORDER**
2. **PLEDGE OF ALLEGIANCE**
3. **APPROVAL OF MINUTES**
 - a. Board of Education Regular Meeting – March 24, 2025 [page 4](#)
4. **PUBLIC COMMENT**
5. **CORRESPONDENCE**
6. **CHAIRMAN’S REPORT**
 - a. Committee Reports
 1. **ACES**
 2. **CABE**
 3. **Communications**
 4. **Curriculum**
 5. **District Health and Safety**
 6. **Diversity, Equity, and Inclusion Executive Committee**
 7. **District Technology**
 - a. Monthly Report [page 6](#)
 8. **Facilities**
 - a. Monthly Report [page 7](#)
 9. **Finance**
 - a. Discussion and Possible Action on Increasing District’s Credit Card Limit [page 8](#)
 - b. Discussion and Possible Action on Healthy Food Certification [page 9](#)
 - c. Discussion of Monthly Financial Statements [page 11](#)
 - d. Director of Finance and Administration Approved Transfers Under \$3,000 [page 40](#)
 - e. Discussion and Possible Action on Budget Transfers over \$3,000 [page 42](#)
 - f. Other
 - i. CNR Quarterly Report [page 43](#)
 - ii. Educational Expenditure Reserve Quarterly Report [page 44](#)
 - iii. Grants Quarterly Report [page 45](#)
10. **Policy**
 - a. First Reads
 - i. **Policy 5131.911 - Connecticut School Climate Policy** [page 50](#)
 - ii. **Policy 5131.81 Cell Phones and other Personal Electronic Devices** [page 59](#)
11. **Personnel**

PLEASE POST

PLEASE POST

a. Personnel Report [page 63](#)

7. NEW BUSINESS & ANNOUNCEMENTS
8. ITEMS FOR THE NEXT REGULAR MEETING AGENDA – Due to Chairperson by April 30, 2025
9. ADJOURNMENT



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

pc: Town Clerks Bethany, Orange, Woodbridge

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

District Mission Statement

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

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



NORMS

BE RESPECTFUL

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

HONOR THE POSITION

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

REPRESENT THE BOARD WITH UNITY AND PRIDE

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

AMITY REGIONAL BOARD OF EDUCATION SPECIAL MEETING AGENDA

Monday, March 24, 2025 6:30 pm
25 Newton Road, Woodbridge, CT
Lecture Hall

BOARD MEMBERS PRESENT

Cathy Bradley, Paul Davis, Carla Eichler, Sean Hartshorn, Dr. Karunakaran, Christina Levere-D'Addio, Michael McDonough, Dr. Carol Oladele, Patrick Reed, and Donna Schuster

BOARD MEMBERS ABSENT

Andrea Hubbard, Dana Lombardi and Donna Schlank

STUDENT BOARD MEMBERS PRESENT

Janet Fan

STAFF MEMBERS PRESENT

Dr. Jennifer Byars and Dr. Shannan Carlson

1. CALL TO ORDER

Chairperson Davis called the meeting to order at 6:35 p.m.

2. PLEDGE OF ALLEGIANCE

Led by Amity Board of Education Chair Paul Davis

3. APPROVAL OF MINUTES

a. Board of Education Regular Meeting – March 10, 2025

MOTION by Cathy Bradley, SECOND by Michael McDonough to approve March 10, 2025 minutes as submitted.

VOTES IN FAVOR, 10 (UNANIMOUS)

MOTION CARRIES

4. STUDENT REPORT

a. Monthly Report

Presented by Board of Education student representative Janet Fan

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

a. [Special Education 101](#) – Tom Brant and Rebecca Rivera

6. SUPERINTENDENT'S REPORT

a. Superintendent Report

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

7. CHAIRMAN'S REPORT

a. Committee Reports

Chairperson Davis read a letter to the community in response to Public Comment from March 10, 2024

Regular Board of Education Meeting and in general response to correspondence to the Board. [Letter linked here](#)

1. Curriculum

Presented by Amity Region 5 Assistant Superintendent of Schools Dr. Shannan Carlson

8. DISCUSSION AND POSSIBLE ACTION ON ESTABLISHING AN AD HOC COMMITTEE TO STUDY AND MAKE RECOMMENDATIONS CONCERNING LATER SCHOOL STARTING TIMES

MOTION by Cathy Bradley, SECOND by Dr. Oladele to establish an Ad Hoc Committee to study and make recommendations concerning later school starting times.

VOTES IN FAVOR, 7 (Bradley, Eichler, Karunakaran, Davis, Oladele, Reed, Schuster)

ABSTAIN, 3 (Levere- D'Addio, Hartshorn, McDonough)

MOTION CARRIES

Chairperson Davis appoints Donna Schuster as the Chair of the Ad Hoc Committee to study and make recommendations concerning later school starting times.

9. PUBLIC COMMENT – Public Comment will be limited to those items noticed in this agenda
None

10. ITEMS FOR THE NEXT REGULAR MEETING AGENDA – Due to Chairperson by March 31, 2025

- a. Preparation for April 28th Strategic Planning Special Meeting

11. ADJOURNMENT

Chairperson Davis adjourned the meeting, without objection, at 8:26 p.m.

Respectfully submitted,

Lisa Zaleski

Lisa Zaleski

BOE Recording Secretary

April 2025

March Ticket Summary

Tickets addressed
and closed: 286

Tickets open: 11

HS Student Help Desk

Students helped: 298

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:

- Implemented a student check-in kiosk in the tech help desks at both middle schools similar to the one used at the HS in order to collect data on the number of students helped.
- Website redesign and major updates have been completed.

Projects in process:

- Acquiring quotes for:
 - Updating our VMWare software on the main District host servers
 - Updating all District Domain Controller servers to the latest version of Windows Server
- Began preparation for migration to a new payment solution and cafeteria point-of-sale solution for the start of the 2025-2026 school year. MySchoolBucks will provide a more seamless experience for families and integrate with PowerSchool.
- Implementing a new anonymous tip line for students and families to report incidents to building and district administration. The new system is called "Anonymous Alerts" and will provide secure and anonymous 2-way communication between the community and administration via a web portal and/or app.
- Currently meeting with vendors that we made contact with at the annual FETC conference in January. We are in the initial stages of exploring solutions for campus security, AI as a tool for administrators and more robust hall pass systems.
- Two new District wide AI tools are implemented and currently being evaluated and monitored.
 - Magic School
 - PowerBuddy

April 2025

CLEAN

SAFE

HEALTHY

SCHOOLS

Amity Regional School District No. 5

Facilities Department Monthly Report

Completed Projects:

- A repair was made to a domestic hot water line in AMSO by an outside contractor.
- Several plumbing fixtures District wide were repaired by our in-house building maintainer due to either vandalism or needed maintenance (faucets, sinks, toilets).
- Several emergency exit sign and exit lights District wide were repaired by our in-house electrician based on inspection reports from our emergency lighting inspection vendor.
- A faulty motion sensor for the classroom lights was replaced by our in-house electrician at AMSB.
- The annual back flow device inspections were completed at ARHS by the Regional Water Authority, no deficiencies were found.
- The annual boiler inspections were completed by the Hartford Steam Boiler Company, minor repairs were suggested, no violations found.

Projects in Process

- Repairs to a few areas in the main driveway at ARHS are scheduled to be completed over April break by an outside contractor.
- The District is working with the Town of Woodbridge to address concerns with the fuel cell and micro-grid. There were meetings on March 14th and 19th with the Town, UI, Amity, Fuel Cell, and DEEP to discuss UI preparing an operational readiness plan. UI submitted a draft of the plan to DEEP on March 24th. Upon review, DEEP has asked UI to make changes to the draft which are being made with input from Amity and the Town. UI, Fuel Cell, Amity, and the Town have also been reviewing operating procedures and equipment maintenance schedules. Titan Energy/Greenskies has submitted the paperwork to the State for approval on the solar canopy project. We anticipate hearing a decision by mid-April.
- The Fire Suppression Bid for the data closet at ARHS has been awarded to W&M Fire Protection. Work is scheduled for the summer.
- Van Zelm is wrapping up the documents needed to go out to bid for the fire pump replacement in Bethany.
- Facilities is working with Silver Petrucelli and Van Zelm to design the scope of work for the HVAC improvements as part of the media center upgrade.
- Facilities is transitioning from SchoolDude to FMX for work order and building scheduling needs. Everything is on track for a July 1st kickoff.
- Repairs are being made to the chiller at AMSO by an outside vendor.
- Preventative maintenance work is being done on the chillers at ARHS by our in-house HVAC mechanic in preparation of the upcoming cooling season.

Amity Regional School
District No. 5

25 Newton Road

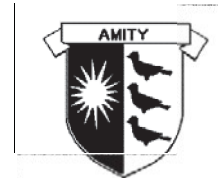
Woodbridge, CT 06525

Phone: 203-397-4817

Fax: 203-397-4864



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



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

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

To: Dr. Jennifer Byars, Superintendent of Schools

From: Theresa Lumas, Director of Finance and Administration

Re: Approval of Credit Card

Date: March 26, 2025

The Board approved the District's application for a credit card through the State of Connecticut P-Card program, which is available to all State agencies and institutions. The program's approved financial institution is US Bank. The card has no annual fees or interest charges.

The primary reason for requesting the card was the increasing number of vendors that no longer accept purchase orders as a payment guarantee. This is particularly common when purchasing software licenses or booking airfare and hotel accommodations. Previously, employees used personal credit cards and requested reimbursements, which were subject to sales tax.

The District credit card is securely stored in the Finance Department safe, and written approval is required before use. Internal procedures and a request form are in place to ensure proper usage. In January 2023, the Board approved a credit limit of \$15,000, which was the best estimate of anticipated usage at the time.

Since implementing the District credit card, we have reduced staff reimbursements and saved on sales tax. However, over the past two years, we have consistently reached the \$15,000 limit during March, April, and May. This period coincides with increased staff travel, conference registrations, and the end-of-year purchasing cycle.

To address this, we are requesting an increase in the credit card limit to \$25,000.

Amity Finance Committee:

Move to recommend the Amity Board of Education...

Amity Board of Education:

Move to ...

Approve increasing the credit limit of the District credit card to \$25,000.

AMITY REGIONAL SCHOOL DISTRICT NO. 5
Bethany Orange Woodbridge
25 Newton Road, Woodbridge Connecticut 06525
(203) 397-4811



Dr. Jennifer P. Byars
Superintendent of Schools

H. Thomas Brant
Director of Pupil Services

Theresa Lumas
Director of Finance
& Administration

Stephen Martoni
Director of Facilities

To: Theresa Lumas, Director of Finance and Administration
From: Kathleen Kovalik, Assistant Director of Finance and Administration
Date: March 28, 2025
Re: Health Food Program Statement for July 1, 2025 through June 30, 2026

Each year the Board of Education has to confirm its participation in the Health Foods program from the State of Connecticut. By participating in this program the District receives payments from the State. In the last fiscal year, the District received \$13,205.00. If the District does not participate in the program, it would not receive these funds. However, the District would still be required to follow the same guidelines as they are issued by the federal government, which provides over \$100,000.00 of support to the nutrition program. Below are the motions I recommend the AFC and Board of Education to make.

Amity Finance Committee:

1. Pursuant to C.G.S. Section 10-215f, the Amity Regional School District No. 5 certifies that all food items offered for sale to students in the schools under its jurisdiction, and not exempted from the Connecticut Nutrition Standards published by the Connecticut State Department of Education, will comply with the Connecticut Nutrition Standards during the period of July 1, 2025, through June 30, 2026. This certification shall include all food offered for sale to students separately from reimbursable meals at all times and from all sources, including but not limited to school stores, vending machines, school cafeterias, culinary programs, and any fundraising activities on school premises sponsored by the school or non-school organizations and groups.

For the Amity Finance Committee:

Recommend the Amity Board of Education approve all sales of food items will comply with the C.G.S. Section 10-215f as stated above.

2. The Amity Regional School District No. 5 will allow the sale to students of food items that do not meet the Connecticut Nutrition Standards and beverages not listed in Section 10-221q of the Connecticut General Statutes provided that the following conditions are met: 1) the sale is in connection with an event occurring after the end of the regular school day or on the weekend; 2) the sale is at the location of the event; and 3) the food and beverage items are not sold from a vending machine or school store. An "event" is an occurrence that involves more than just a regularly scheduled practice, meeting, or extracurricular activity. For example, soccer games, school plays, and interscholastic debates are events but soccer practices, play rehearsals, and debate team meetings are not. The "regular school day" is the period from midnight before to 30 minutes after the end of the official school day. "Location" means where the event is being held and must be the same place as the food and beverage sales

For the Amity Finance Committee:

Recommend the Amity Board of Education approve the exemption of food and beverage items sold at events as stated above.

Amity Board of Education:

1. Pursuant to C.G.S. Section 10-215f, the Amity Regional School District No. 5 certifies that all food items offered for sale to students in the schools under its jurisdiction, and not exempted from the Connecticut Nutrition Standards published by the Connecticut State Department of Education, will comply with the Connecticut Nutrition Standards during the period of July 1, 2025, through June 30, 2026. This certification shall include all food offered for sale to students separately from reimbursable meals at all times and from all sources, including but not limited to school stores, vending machines, school cafeterias, culinary programs, and any fundraising activities on school premises sponsored by the school or non-school organizations and groups.

For the Amity Board of Education:

Move to approve all sales of food items will comply with the C.G.S. Section 10-215f as stated above.

2. The Amity Regional School District No. 5 will allow the sale to students of food items that do not meet the Connecticut Nutrition Standards and beverages not listed in Section 10-221q of the Connecticut General Statutes provided that the following conditions are met: 1) the sale is in connection with an event occurring after the end of the regular school day or on the weekend; 2) the sale is at the location of the event; and 3) the food and beverage items are not sold from a vending machine or school store. An “event” is an occurrence that involves more than just a regularly scheduled practice, meeting, or extracurricular activity. For example, soccer games, school plays, and interscholastic debates are events but soccer practices, play rehearsals, and debate team meetings are not. The “regular school day” is the period from midnight before to 30 minutes after the end of the official school day. “Location” means where the event is being held and must be the same place as the food and beverage sales

For the Amity Board of Education:

Move to exempt food and beverage items sold at events as stated above.

AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES AND EXPENDITURES
FOR FY 2024-2025

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2023-2024	2024-2025	FEB 25	CHANGE	MAR 25	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
1	MEMBER TOWN ALLOCATIONS	53,388,441	55,272,025	55,272,025	0	55,272,025	0	FAV
2	OTHER REVENUE	369,550	247,545	293,445	0	293,445	45,900	FAV
3	OTHER STATE GRANTS	839,037	922,082	774,368	0	774,368	(147,714)	UNF
4	MISCELLANEOUS INCOME	15,385	15,000	20,000	0	20,000	5,000	FAV
5	TOTAL REVENUES	54,612,413	56,456,652	56,359,838	0	56,359,838	(96,814)	UNF
6	SALARIES	29,108,667	31,251,456	31,210,479	(55,472)	31,155,007	(96,449)	FAV
7	BENEFITS	5,796,459	6,828,489	6,813,607	0	6,813,607	(14,882)	FAV
8	PURCHASED SERVICES	9,433,792	10,242,333	10,056,617	(21,966)	10,034,651	(207,682)	FAV
9	DEBT SERVICE	4,417,942	3,858,211	3,858,211	0	3,858,211	0	FAV
10	SUPPLIES (INCLUDING UTILITIES)	3,161,505	3,459,384	3,591,268	70,000	3,661,268	201,884	UNF
11	EQUIPMENT	169,506	200,101	216,261	0	216,261	16,160	UNF
12	IMPROVEMENTS / CONTINGENCY	272,756	392,500	373,215	(140,715)	232,500	(160,000)	FAV
13	DUES AND FEES	169,465	224,178	229,178	0	229,178	5,000	UNF
14	TRANSFER ACCOUNT	1,091,054	0	0	0	0	0	FAV
15	TOTAL EXPENDITURES	53,621,146	56,456,652	56,348,836	(148,153)	56,200,683	(255,969)	FAV
16	SUBTOTAL	991,268	0	11,002	148,153	159,155	159,155	FAV
17	PLUS: CANCELLATION OF PRIOR YEAR'S ENCUMBRANCES	59,412	0	0	0	0	0	FAV
18	DESIGNATED FOR SUBSEQUENT YEAR'S BUDGET:	0	0	0	0	0	0	FAV
19	NET BALANCE / (DEFICIT)	1,050,680	0	11,002	148,153	159,155	159,155	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 2024-2025

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2023-2024	2024-2025	FEB 25	CHANGE	MAR 25	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
1	BETHANY ALLOCATION	9,075,014	9,012,104	8,828,986	0	8,828,986	(183,118)	UNF
1a	PRIOR YEAR CREDIT BETHANY	242,337		183,118		183,118	183,118	
2	ORANGE ALLOCATION	25,388,491	27,479,040	26,964,444	0	26,964,444	(514,596)	UNF
2a	PRIOR YEAR CREDIT ORANGE	715,253		514,596		514,596	514,596	
3	WOODBIDGE ALLOCATION	17,504,540	18,780,881	18,427,914	0	18,427,914	(352,967)	UNF
3a	PRIOR YEAR CREDIT WOODBRIDGE	462,806		352,967		352,967	352,967	
4	MEMBER TOWN ALLOCATIONS	53,388,441	55,272,025	55,272,025	0	55,272,025	0	FAV
5	ATHLETICS	27,229	28,000	28,000	0	28,000	0	FAV
6	INVESTMENT INCOME	151,963	60,000	110,000	0	110,000	50,000	FAV
7	PARKING INCOME	32,019	31,150	31,150	0	31,150	0	FAV
8	RENTAL INCOME	33,887	25,000	13,735	0	13,735	(11,265)	UNF
9	TUITION REVENUE	124,453	103,395	110,560	0	110,560	7,165	FAV
10	TRANSPORTATION BOWA AGREEMENT	0	0	0	0	0	0	FAV
11	OTHER REVENUE	369,550	247,545	293,445	0	293,445	45,900	FAV
12	ADULT EDUCATION	4,521	4,754	5,178	0	5,178	424	FAV
14	SPECIAL EDUCATION GRANTS	812,416	893,928	747,090	0	747,090	(146,838)	UNF
15	TRANSPORTATION INCOME-MAGNET	22,100	23,400	22,100	0	22,100	(1,300)	UNF
16	OTHER STATE GRANTS	839,037	922,082	774,368	0	774,368	(147,714)	UNF
17	INTERGOVERNMENTAL REVENUE	0	0	0	0	0	0	FAV
18	OTHER REVENUE	15,385	15,000	20,000	0	20,000	5,000	FAV
19	TRANSFER IN	0	0	0	0	0	0	FAV
20	MISCELLANEOUS INCOME	15,385	15,000	20,000	0	20,000	5,000	FAV
21	TOTAL REVENUES	54,612,413	56,456,652	56,359,838	0	56,359,838	(96,814)	UNF

Column 7: FAV=Favorable Variance

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

AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES AND EXPENDITURES
FOR FY 2024-2025

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2023-2024	2024-2025	FEB 25	CHANGE	MAR 25	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
1	5111-CERTIFIED SALARIES	23,917,065	25,596,300	25,732,701	(57,922)	25,674,779	78,479	UNF
2	5112-CLASSIFIED SALARIES	5,191,602	5,655,156	5,477,778	2,450	5,480,228	(174,928)	FAV
3	SALARIES	29,108,667	31,251,456	31,210,479	(55,472)	31,155,007	(96,449)	FAV
4	5200-MEDICARE - ER	407,317	455,244	455,244	0	455,244	0	FAV
5	5210-FICA - ER	337,860	360,217	360,217	0	360,217	0	FAV
6	5220-WORKERS' COMPENSATION	158,561	165,818	158,586	0	158,586	(7,232)	FAV
7	5255-MEDICAL & DENTAL INSURANCE	3,611,804	4,574,718	4,549,222	0	4,549,222	(25,496)	FAV
8	5860-OPEB TRUST	265,890	291,313	291,313	0	291,313	0	FAV
9	5260-LIFE INSURANCE	48,405	64,396	64,396	0	64,396	0	FAV
10	5275-DISABILITY INSURANCE	12,106	12,062	12,062	0	12,062	0	UNF
11	5280-PENSION PLAN - CLASSIFIED	726,430	670,604	670,604	0	670,604	0	FAV
12	5281-DEFINED CONTRIBUTION RETIREMENT PLAN	189,595	197,327	197,327	0	197,327	0	FAV
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	36,600	7,590	25,436	0	25,436	17,846	UNF
17	5291-CLOTHING ALLOWANCE	1,891	2,200	2,200	0	2,200	0	FAV
18	5292-TUITION REIMBURSEMENT	0	27,000	27,000	0	27,000	0	FAV
19	BENEFITS	5,796,459	6,828,489	6,813,607	0	6,813,607	(14,882)	FAV
20	5322-INSTRUCTIONAL PROG IMPROVEMENT	61,690	64,200	64,200	0	64,200	0	FAV
21	5327-DATA PROCESSING	132,568	138,302	138,302	0	138,302	0	FAV
22	5330-PROFESSIONAL & TECHNICAL SRVC	2,129,837	2,298,132	2,356,124	0	2,356,124	57,992	UNF
23	5440-RENTALS - LAND, BLDG, EQUIPMENT	109,700	112,566	112,566	0	112,566	0	FAV
24	5510-PUPIL TRANSPORTATION	3,833,125	4,020,506	3,997,506	(21,966)	3,975,540	(44,966)	FAV
25	5521-GENERAL LIABILITY INSURANCE	282,623	305,004	309,835	0	309,835	4,831	UNF
26	5550-COMMUNICATIONS: TEL, POST, ETC.	103,472	115,076	115,076	0	115,076	0	FAV
27	5560-TUITION EXPENSE	2,712,997	3,093,272	2,867,733	0	2,867,733	(225,539)	FAV
28	5590-OTHER PURCHASED SERVICES	67,780	95,275	95,275	0	95,275	0	FAV
29	PURCHASED SERVICES	9,433,792	10,242,333	10,056,617	(21,966)	10,034,651	(207,682)	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 2024-2025

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2023-2024	2024-2025	FEB 25	CHANGE	MAR 25	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
30	5830-INTEREST	523,986	368,978	368,978	0	368,978	0	FAV
31	5910-REDEMPTION OF PRINCIPAL	3,893,956	3,489,233	3,489,233	0	3,489,233	0	FAV
32	DEBT SERVICE	4,417,942	3,858,211	3,858,211	0	3,858,211	0	FAV
33	5410-UTILITIES, EXCLUDING HEAT	679,399	712,402	887,511	33,000	920,511	208,109	UNF
34	5420-REPAIRS, MAINTENANCE & CLEANING	792,147	802,305	821,590	0	821,590	19,285	UNF
35	5611-INSTRUCTIONAL SUPPLIES	371,596	444,802	414,802	0	414,802	(30,000)	FAV
36	5613-MAINTENANCE/CUSTODIAL SUPPLIES	172,498	240,780	240,780	0	240,780	0	FAV
37	5620-OIL USED FOR HEATING	63,373	60,930	60,930	12,000	72,930	12,000	UNF
38	5621-NATURAL GAS	84,228	104,180	74,180	15,000	89,180	(15,000)	FAV
39	5627-TRANSPORTATION SUPPLIES	197,523	180,913	196,503	0	196,503	15,590	UNF
40	5641-TEXTS & DIGITAL RESOURCES	117,975	178,281	169,281	0	169,281	(9,000)	FAV
41	5642-LIBRARY BOOKS & PERIODICALS	17,715	20,550	20,550	0	20,550	0	FAV
42	5690-OTHER SUPPLIES	230,134	257,296	257,296	10,000	267,296	10,000	UNF
43	5695-OTHER SUPPLIES-TECHNOLOGY	434,917	456,945	447,845	0	447,845	(9,100)	FAV
44	SUPPLIES (INCLUDING UTILITIES)	3,161,505	3,459,384	3,591,268	70,000	3,661,268	201,884	UNF
45	5730-EQUIPMENT - NEW	36,099	2,000	2,000	0	2,000	0	FAV
46	5731-EQUIPMENT - REPLACEMENT	60,136	52,301	52,301	0	52,301	0	FAV
47	5732-EQUIPMENT - TECH - NEW	317	0	0	0	0	0	FAV
48	5733-EQUIPMENT - TECH - REPLACEMENT	72,954	145,800	161,960	0	161,960	16,160	UNF
49	EQUIPMENT	169,506	200,101	216,261	0	216,261	16,160	UNF
50	5715-IMPROVEMENTS TO BUILDING	175,146	73,500	73,500	0	73,500	0	FAV
51	5715-FACILITIES CONTINGENCY	100,000	100,000	100,000	0	100,000	0	FAV
51a	TRSF. FROM FACILITIES CONTINGENCY	-100,000	0	(19,285)	(80,715)	(100,000)	(100,000)	FAV
52	5720-IMPROVEMENTS TO SITES	97,610	69,000	69,000	0	69,000	0	FAV
53	5850-DISTRICT CONTINGENCY	137,162	150,000	150,000	0	150,000	0	FAV
53a	TRSF. FROM CONTINGENCY TO OTHER ACCTS.	-137,162	0	0	(60,000)	(60,000)	(60,000)	FAV
54	IMPROVEMENTS / CONTINGENCY	272,756	392,500	373,215	(140,715)	232,500	(160,000)	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 2024-2025**

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2023-2024	2024-2025	FEB 25	CHANGE	MAR 25	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./((DECR.)	FORECAST	OVER/(UNDER)	UNF
55	5580-STAFF TRAVEL	24,997	25,888	25,888	0	25,888	0	FAV
56	5581-TRAVEL - CONFERENCES	53,964	86,855	91,855	0	91,855	5,000	UNF
57	5810-DUES & FEES	90,504	111,435	111,435	0	111,435	0	FAV
58	DUES AND FEES	169,465	224,178	229,178	0	229,178	5,000	UNF
59	5856-TRANSFER ACCOUNT	1,091,054	0	0	0		0	FAV
60	TOTAL EXPENDITURES	53,621,146	56,456,652	56,348,836	(148,153)	56,200,683	(255,969)	FAV
61								
Note:	RESTRICTED - RETURN TO TOWNS	1,050,680						

**AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES & EXPENDITURES BY CATEGORY
FINANCIAL ANALYSIS
FOR THE FISCAL YEAR 2024-2025**



March 2025

2024-2025 FORECAST

OVERVIEW

The projected unspent fund balance for this fiscal year is \$159,155 FAV, previously \$11,002 FAV, which appears on page 1, column 6, and line 19. The unspent funds from fiscal year 2024, \$1,050,680 was deducted from the town allocations in March 2025. This is comprised of \$991,268 of FY24 unspent funds and \$59,412 in FY23 unspent encumbrances. This Board approved 2% of the unspent funds as an end-of-year transfer. The appropriation request to the educational expenditure account is shown on line 59 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 was approved at the September 2024 meeting.

REVENUES BY CATEGORY

The projected yearend balance of revenues is **\$96,814 UNF**, previously **\$96,814, UNF** which appears on page 2, column 6, line 21.

LINE 5 on Page 2: ATHLETICS:

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

LINE 6 on Page 2: INVESTMENT INCOME:

The forecast is based on the budget developed. *The forecast is \$50,000 FAV, previously \$50,000 FAV.*

<u>Month</u>	<u>M&T Bank</u>	<u>State Treasurer's Investment Fund</u>
July 2024	.40%	5.43%
August 2024	.40%	5.41%
September 2024	.40%	5.26%
October 2024	.40%	5.00%
November 2024	.40%	4.82%
December	.40%	4.66%
January	.40%	4.46%
February	.40%	4.44%
March	.40%	4.43%

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: RENTAL INCOME:

The forecast is based on the budget developed on estimated payments for the fiscal year. *The forecast is \$11,265 UNF, previously \$11,265 UNF.*

LINE 9 on Page 2: TUITION REVENUE:

The budget is based on seven tuition students, three at a reduced employee rates. **Full tuition rate is \$21,636.** The actual tuition charged is higher (\$578 per year). *Seven tuition students are enrolled, including three at reduced employee rates, and two students not yet moved into the District paying monthly. The forecast is \$7,165 FAV, including \$2,838 from the rate change, previously \$7,165 FAV.*

LINE 12 on Page 2: ADULT EDUCATION:

The forecast is based on historical data of State payments. *The forecast is \$424 FAV, previously \$424 FAV.*

LINE 14 on Page 2: SPECIAL EDUCATION GRANTS:

The current projection is based on budgeted costs for placements and transportation. The budget assumes a 68% reimbursement rate. The State passed legislation in June 2023 which increased the reimbursement rate to 85% but still capped at 68% reimbursement. This impacts the budget. *The forecast is \$146,838 UNF, previously \$146,838 UNF due to latest State reimbursement estimates projected based on the latest expenditure data report to the State and the historical low reimbursement rate of 60%. Our first payment this year was at 59.96%. The forecast increased from last month due to the higher expenses reported in September and December.*

LINE 15 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, previously \$1,300 UNF.*

LINE 18 on Page 2: OTHER REVENUE:

The forecast is based on the budget developed on historical payments. *The forecast is \$5,000 FAV, previously \$5,000 FAV.*

EXPENDITURES BY CATEGORY

The projected yearend balance of expenditures is *\$255,969 FAV, previously \$107,816 FAV* which appears on page 5, column 6, line 60.

LINE 1 on Page 3: 5111-CERTIFIED SALARIES:

The forecast is based on budget. There are still vacant positions. Turnover savings on positions filled to date is currently more than budgeted, \$3,339 FAV, previously \$89,409 UNF. There were 5 retirements budgeted, and only 3 retirements submitted. The salary for staff filling positions due to retirement and resignations is more than budgeted. The budget assumes new hires at step MA5, however the average of new staff is MA9 step. This does translate to a more experienced teaching staff, but not as much of a monetary savings. There is currently \$91,152 FAV from unpaid leaves. *The account is forecasted to be \$78,479 UNF, previously \$136,401 UNF. The need for substitutes has increased significantly year-over-year partially due to paid FMLA and increased school business days.*

LINE 2 on Page 3: 5112-CLASSIFIED SALARIES:

The forecast is based on budget. The cyber tech position was outsourced, savings of \$58,198 on the salary line. *Turnover on positions filled to date exceeds the turnover estimates by \$48,222 FAV, previously \$48,222 FAV. Forecast for all accounts are \$174,928 FAV, previously \$174,737 FAV. There is a significant turnover in paraeducators, several custodians and secretaries, creating gaps in filling positions. Some substitutes have been contracted through outside agencies.*

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 more than budgeted. The renewal policy is \$665 UNF. The District received a members' equity rebate for \$7,897 FAV. The forecast is \$7,232 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 claims are a significant factor which is why it is given in detail below. *Claims are forecasted to be 97.5% of budget.*

The forecast projects actual claims and fees of current employees and retirees will be neutral with the budget, however claims are more than the month-to-month forecast. The projected monthly budget is based on an average of five years of claims. One position was outsourced, projecting a savings of \$25,496 in claims and fees.

CLAIMS OF CURRENT EMPLOYEES AND RETIREES

MONTH	2024-2025 ACTUAL	2024-2025 BUDGET	VARIANCE	2023-2024 ACTUAL	2022-2023 ACTUAL
<i>JUL*</i>	\$ 347,337	\$ 370,320	\$ (22,983)	\$ 364,829	\$ 34,837
<i>AUG</i>	\$ 488,825	\$ 517,730	\$ (28,905)	\$ 641,037	\$ 798,616
<i>SEP</i>	\$ 404,062	\$ 475,645	\$ (71,583)	\$ 412,377	\$ 551,212
<i>OCT</i>	\$ 549,988	\$ 390,384	\$ 159,604	\$ 508,930	\$ 297,594
<i>NOV</i>	\$ 458,288	\$ 457,220	\$ 1,068	\$ 541,882	\$ 306,068
<i>DEC</i>	\$ 477,519	\$ 607,753	\$ (130,234)	\$ 363,042	\$ 435,108
<i>JAN</i>	\$ 328,754	\$ 391,200	\$ (62,446)	\$ 220,714	\$ 311,328
<i>FEB</i>	\$ 382,582	\$ 283,638	\$ 98,944	\$ 183,906	\$ 190,062
<i>MAR</i>	\$ 303,213	\$ 368,489	\$ (65,276)	\$ 261,829	\$ 313,582
<i>APR</i>	\$ 332,509	\$ 332,509	\$ -	\$ 266,018	\$ 222,547
<i>MAY</i>	\$ 348,408	\$ 348,408	\$ -	\$ 456,890	\$ 486,004
<i>JUN</i>	\$ 348,237	\$ 348,237	\$ -	\$ 369,321	\$ 302,891
TOTALS	\$ 4,769,722	\$ 4,891,532	\$ (121,810)	\$ 4,590,775	\$ 4,249,849

ACTUAL/FORECAST CLAIMS AS A PERCENTAGE OF EXPECTED CLAIMS

2020-2021 ACTUAL	2021-2022 ACTUAL	2022-2023 ACTUAL	2023-2024 ACTUAL	2024-2025 FORECAST
75.8%	97.3%	93.6%	99.5%	97.5%

*Incomplete billing cycle in July 2023

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

MONTH	2024-2025 ACTUAL	2024-2025 BUDGET	VARIANCE	2023-2024 ACTUAL	2022-2023 ACTUAL
<i>JUL</i>	\$ 50,798	\$ 37,888	\$ 12,910	\$ 44,555	\$ 30
<i>AUG</i>	\$ 54,969	\$ 63,533	\$ (8,564)	\$ 54,176	\$ 83,030
<i>SEP</i>	\$ 14,743	\$ 52,368	\$ (37,625)	\$ 53,028	\$ 61,858
<i>OCT</i>	\$ 53,552	\$ 54,324	\$ (772)	\$ 52,666	\$ 47,063
<i>NOV</i>	\$ 53,061	\$ 53,324	\$ (263)	\$ 53,732	\$ 50,445
<i>DEC</i>	\$ 51,875	\$ 56,241	\$ (4,366)	\$ 53,218	\$ 52,888
<i>JAN</i>	\$ (6,882)	\$ 45,676	\$ (52,558)	\$ 48,165	\$ 25,978
<i>FEB</i>	\$ 82,020	\$ 66,557	\$ 15,463	\$ 57,785	\$ 46,388
<i>MAR</i>	\$ (10,286)	\$ 55,147	\$ (65,433)	\$ (8,744)	\$ 74,389
<i>APR</i>	\$ 50,345	\$ 50,345	\$ -	\$ 46,575	\$ 43,145
<i>MAY</i>	\$ 54,104	\$ 54,104	\$ -	\$ 41,342	\$ 47,499
<i>JUN</i>	\$ 44,360	\$ 44,360	\$ -	\$ (6,272)	\$ 18,816
TOTALS	\$ 492,659	\$ 633,867	\$ (141,208)	\$ 490,226	\$ 551,529

LINE 9 on Page 3: 5260-LIFE INSURANCE:

The forecast is based on budget.

LINE 10 on Page 3: 5275-DISABILITY INSURANCE:

The forecast is based on budget.

LINE 16 on Page 3: 5290-UNEMPLOYMENT:

The forecast is based on first quarter billing, \$17,846 UNF, previously \$17,846 UNF.

LINE 22 on Page 3: 5330-PROFESSIONAL TECHNICAL SERVICES:

The forecast is projected to be over budget due to outsourcing one position for cybersecurity, \$83,694 UNF. This is offset by savings on a student device lease agreement of \$25,702 FAV. *Net for the account is currently, \$57,992 UNF, previously \$57,992 UNF.*

LINE 23 on Page 3: 5440-RENTALS:

The forecast is based on budget.

LINE 24 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 including special education transportation is \$44,966 FAV, previously \$23,000 FAV for Vo-Ag and Vo-Tech bussing.* A bus was reduced to Emmett O'Brien tech due to low enrollment, this reduction was captured in the budget and is not an additional savings. The actual Platt Tech bus cost was less than estimated, \$28,168 FAV.

LINE 25 on Page 3: 5521-GENERAL LIABILITY INSURANCE: Various liability policies, including medical professional renewed under budget, while Student Accident insurance renewed over budget. General liability is under \$3,825 FAV and medical professional coverage is under \$306 Student Accident is \$8,962 UNF. *Account is \$4,831 UNF, previously \$4,831 UNF.*

LINE 26 on Page 3: 5550-COMMUNICATION: TEL, POST, ETC:

The forecast is based on budget.

LINE 27 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 \$225,539 FAV, previously \$225,539 FAV. The tuition rate for vocational and magnet schools was reduced by the State Legislature in June 2024. Data changes based on actual student placements and services.*

Tuition for the Vo-Ag schools is based on \$106,568 FAV, previously \$106,568 FAV.

	FY20-21 ACTUAL	FY21-22 ACTUAL	FY22-23 ACTUAL	FY23-24 ACTUAL	FY24-25 BUDGET	FY24-25 FORECAST
Sound	5	3	3	3	5	4
Trumbull	3	1	3	4	4	3
Nonnewaug	7	9	7	8	8	4

Emmett O'Brien	0	0	2	2	2	2
Common Ground Charter HS	1	1	3	2	1	0
Fairchild Wheeler	0	0	0	0	0	1(1)
NH Coop Arts	0	0	0	0	0	1
Wintergreen Magnet	0	1	0	0	0	0
Marine Science Magnet HS	0	0	1	0	0	0
Engineering Science Magnet	0	0	0	0	0	1
Lyman Hall-Vo-AG School	0	0	0	0	0	1
Totals	16	15	20	17	18	17(17)

ECA is \$53,254 FAV, previously \$53,254 FAV.

	FY20-21 ACTUAL	FY21-22 ACTUAL	FY22-23 ACTUAL	FY23-24 ACTUAL	FY24-25 BUDGET	FY24-25 FORECAST
ECA	16	18	19	19	19	19

Public (ACES) and private out-of-district placements are \$65,717 FAV, previously \$119,022 FAV.

	FY20-21 ACTUAL	FY21-22 ACTUAL	FY22-23 ACTUAL	FY23-24 ACTUAL	FY24-25 BUDGET	FY24-25 FORECAST
Public SPED	6	10	9	8	11	9
Private SPED	27	20	16	19	16	15
Totals	33	30	25	27	27	24(24)

LINE 33 on Page 4: 5410-UTILITIES, EXCLUDING HEAT:

The 2024-2025 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 \$208,109 UNF due to higher demand, delivery and public benefit charges, previously

\$175,109 UNF. It is difficult to estimate the supplemental charges and current rates project a \$167,000 UNF affect on the account. There is a budget transfer requested this month for \$140,000 from contingencies.

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

The budget for water is \$59,200. *The forecast is \$5,000 UNF, previously \$5,000 UNF.*

Sewer costs are budgeted at \$31,109. *The forecast is \$3,109 UNF, previously 3,109 UNF.*

ELECTRICITY (KILOWATT HOURS)

MONTH	2024-2025 FORECAST	2024-2025 BUDGET	VARIANCE	2023-2024 ACTUAL	2022-2023 ACTUAL
<i>JUL</i>	<i>352,636</i>	307,438	<i>45,198</i>	275,363	325,263
<i>AUG</i>	<i>341,068</i>	339,080	<i>1,988</i>	339,333	350,459
<i>SEP</i>	<i>315,393</i>	304,849	<i>10,544</i>	295,827	294,292
<i>OCT</i>	<i>302,667</i>	278,181	<i>24,486</i>	250,944	252,949
<i>NOV</i>	<i>264,619</i>	261,922	<i>2,697</i>	251,734	252,160
<i>DEC</i>	<i>259,154</i>	259,642	<i>(488)</i>	233,988	245,784
<i>JAN</i>	<i>292,535</i>	275,541	<i>16,994</i>	271,629	262,051
<i>FEB</i>	<i>268,168</i>	270,438	<i>(2,270)</i>	255,916	259,362
MAR	255,558	255,558	-	242,795	249,254
APR	264,677	264,677	-	262,074	250,112
MAY	257,500	257,500	-	288,966	264,292
JUN	302,174	302,174	-	320,107	287,285
Totals	3,476,149	3,377,000	99,149	3,288,676	3,293,263

DEGREE DAYS

There are 4,675 degree days to date as opposed to 3,427 last year.

LINE 34 on Page 4: 5420-REPAIRS & MAINTENANCE: *The forecast is projected to be \$19,285 UNF, previously \$19,285 UNF.* A budget transfer was approved in October to cover duct cleaning at AMSO, \$9,800 UNF. A transfer request was approved in November for \$9,485 for 2 variable frequency drives damaged during the microgrid test at ARHS. The budget for snowplowing, salting and sanding is currently \$9,850 UNF. Mr. Martoni is reviewing all blanket purchases orders for supplies and making reductions when appropriate. We are trying to cover the snow plowing overage within the accounts due to the increased electrical costs.

LINE 36 on Page 4: 5613-MAINTENANCE SUPPLIES: *The forecast is projected to be neutral.*

LINE 37 & 38 on Page 4: 5620 & 5621-OIL & NATURAL GAS:

The budget for natural gas is \$104,180 and the budget for oil is \$2.83 per gallon, and \$60,930 annually. *The forecast is projected to be \$3,000 FAV, previously \$30,000 FAV.*

LINE 39 on Page 4: 5627-TRANSPORTATION SUPPLIES: *The forecast is projected to be \$15,590 UNF, previously \$15,590. The amount of fuel allocated to drivers has increased in the past two years based on actual daily run mileage and two gasoline fueled buses that have different fuel allotments. This account was over budget last year and the current data indicates it will be over budget this fiscal year. The account has been adjusted in the proposed FY26 budget.*

LINE 43 on Page 4: 5695-OTHER SUPPLIES-TECHNOLOGY:
The forecast is projected to be \$9,100 FAV, previously \$9,100 FAV.

LINE 45 on Page 4: 5730-EQUIPMENT -NEW:
The forecast is projected to be neutral.

LINE 46 on Page 4: 5731-EQUIPMENT -REPLACEMENT:
The forecast is projected to be neutral.

LINE 48 on Page 4: 5733-EQUIPMENT –TECHNOLOGY-REPLACEMENT:
The forecast is projected to be \$16,160 UNF, previously \$16,160 UNF. A transfer was approved in October to cover the purchase of an additional 20 teacher devices (40 in total).

LINE 51 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. A transfer request was approved for \$9,800 for duct cleaning at AMSO. A transfer request was approved in November for \$9,485 for 2 variable frequency drives damaged during the microgrid test at ARHS. *There is a transfer request this month to cover increased electricity charges. The facilities contingency balance will be zero, previously \$80,715.*

LINE 53 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. *There is a transfer request this month to cover increased electricity charges. The contingency balance will be \$90,000, previously \$150,000.*

LINE 59 on Page 5: 5856-TRANSFER:
This line is used to identify funds for the Educational Expenditures Reserve transfers. The District is legally allowed to transfer with Board approval up to 2% or \$1,129,132 of the current budget. The item will be presented after the final balance for the FY25 is confirmed at the August/September 2025 meeting.

LINE 61 on Page 5: RESTRICTED: RETURN TO TOWNS:
The line is for the unspent funds from FY24. The audited amount of unspent funds of \$1,050,680 FAV was credited to the member towns' March allocations. This is comprised of \$991,268 of unspent funds in FY24 and unliquidated encumbrances from FY23 of \$59,412. *The town allocations were reduced in March 2025.*

APPENDIX A

COST SAVINGS AND EFFICIENCIES FOR FISCAL YEAR 2024-2025

TOTAL ANNUAL SAVINGS TO-DATE OF: \$122,245

\$7,055 Cable Advisory Grant: The District will use these funds for cameras.

\$21,138 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.

\$20,433 Pegpetia Grant: The District's application for Pegpetia funds was approved. The District used these funds for new transmission, switching, and streaming systems for both of Amity's Middle Schools. This will provide students with a stable platform from which students may produce live events or live-to-tape events. Students can collaboratively work to produce and stream morning announcements, student video projects, student news segments, guest speakers, school presentations.

\$73,618 Electricity Rates: The District participates in consortium for electricity pricing. Year to date savings are calculated in comparing UI/Eversource rates to our contracted price.

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 2023-2024 - \$965,771
- Fiscal Year 2022-2023 - \$ 42,565
- Fiscal Year 2021-2022 - \$ 78,854
- Fiscal Year 2020-2021 - \$128,708
- Fiscal Year 2019-2020 - \$ 43,497
- Fiscal Year 2018-2019 - \$ 52,451
- Fiscal Year 2017-2018 - \$746,688
- Fiscal Year 2016-2017 - \$595,302
- Fiscal Year 2015-2016 - \$125,911
- 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).

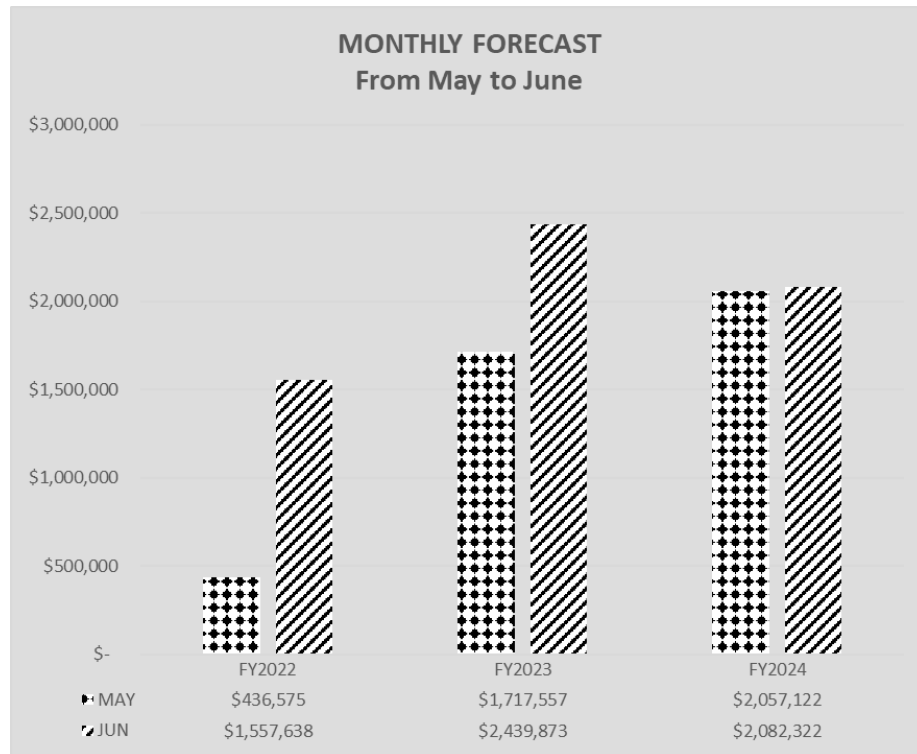
Revenues can be most impacted by decisions made at the State level for Special Education and Transportation grants. We have seen the reimbursement rate change in mid-year.

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.

FY2022:

The audited fund balance is \$628,463. ***This surplus from prior year was credited to the member towns March allocation 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 gage. Athletics rentals of all weather fields at other location for teams' practice experience was not needed and other facility rentals were lower than anticipated. Special education transportation and tuition were also \$259,748 lower due to unexpected changes in outplacements, fewer unanticipated services than budgeted and unfilled positions in the department.
- **\$83,850:** Electrical and water consumption was lower than anticipated. Instructional supplies were less than anticipated.
- **(\$516,982) Capital and Nonrecurring (CNR) Account:** The positive variances above were offset by increasing the CNR request from 1% to 2% based on new information regarding the carrying over of fund balances. The Board approved \$929,175 or 1.80% in August 2022.

FY2023:

The audited fund balance is \$1,346,323 assuming 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 **\$695,761 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.

FY2024:

The audited fund balance is \$991,268 assuming an allocation of 2% or \$1,091,054 appropriated to Educational Expenditure Account . The monthly forecast for May 2024 projected a fund balance of \$1,129,780. The change is **\$1,229,566 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:

- **\$176,442:** Certified and classified salaries were lower due to the staff turnover, leaves of absences and vacancies impacting the District all year. Current staff covered additional classes, additional substitutes and consultants were hired to cover vacant positions.
- **\$535,394** Benefits were lower mostly due to medical fees, stop loss credits and OPEB adjustments.
- **\$36,626** Supplies were lower due to favorable utility consumption, unspent instructional supplies, and less maintenance supplies purchased.
- **\$295,125:** Special Education tuition charges were less than budgeted due to changes in students's services and/or attendance in programs.
- **\$12,838:** The contingency account was not fully expended as expected.

APPENDIX C

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.

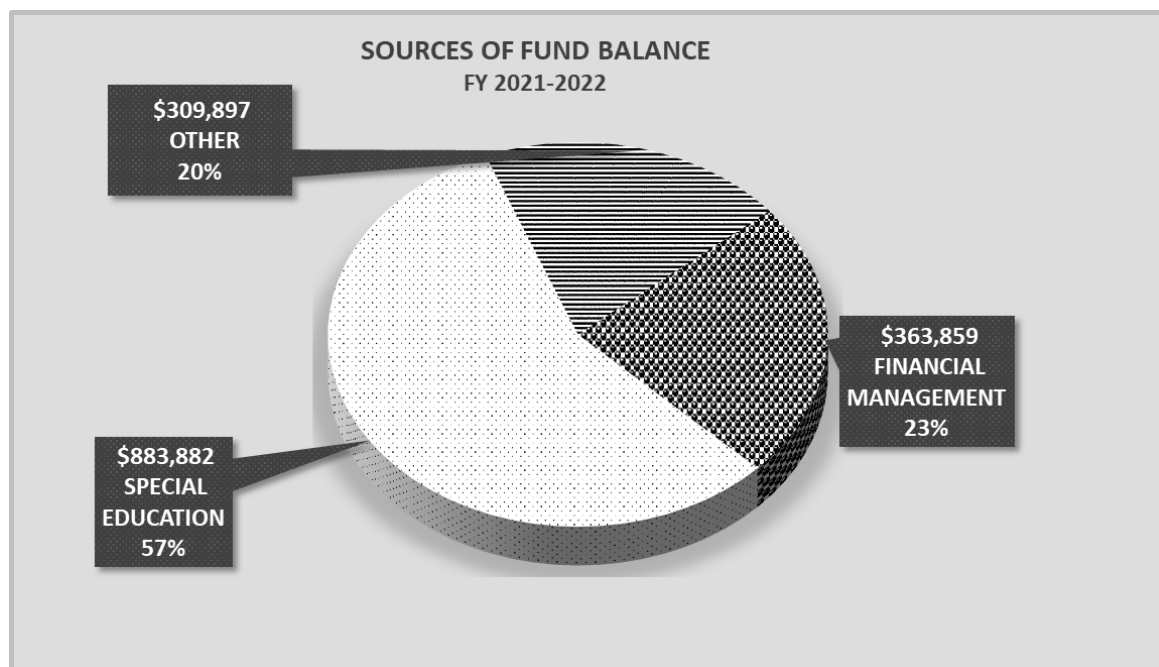
\$18,429 PURCHASED SERVICES (OTHER): Other purchased services accounts were under budget collectively by \$8,666 due to less printed materials and catered events. Data processing was under budget by \$9,763 as the administration consolidated onboarding software options at a reduced cost.

\$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..

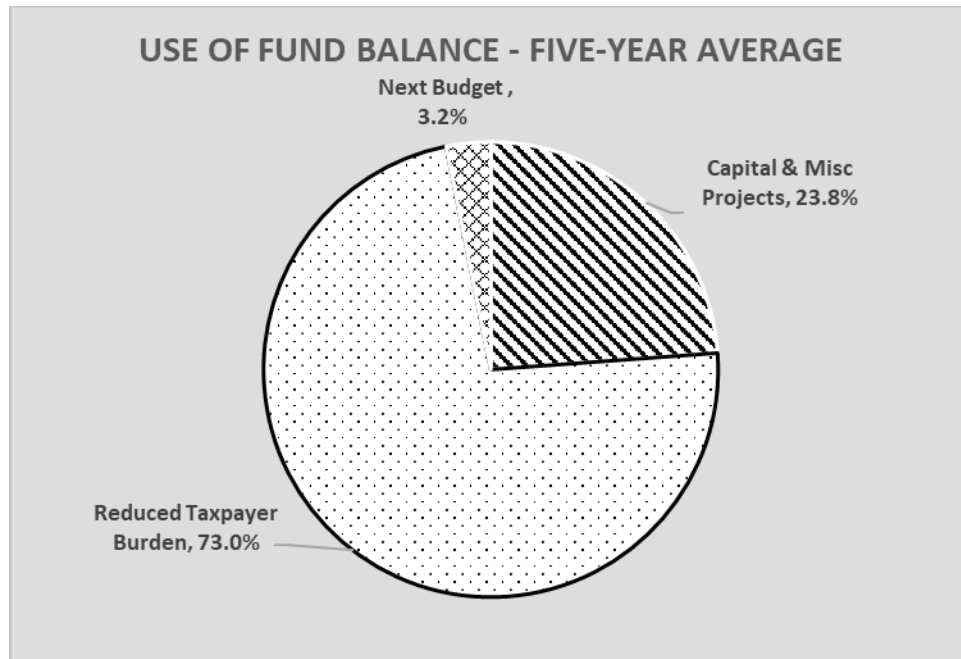
The primary sources of the fund balance are shown graphically below:



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 be subtracted from the Towns’ March 2023 allocation payments.

APPENDIX D

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:

\$ 287,004

\$430,900 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 period

of long periods 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.

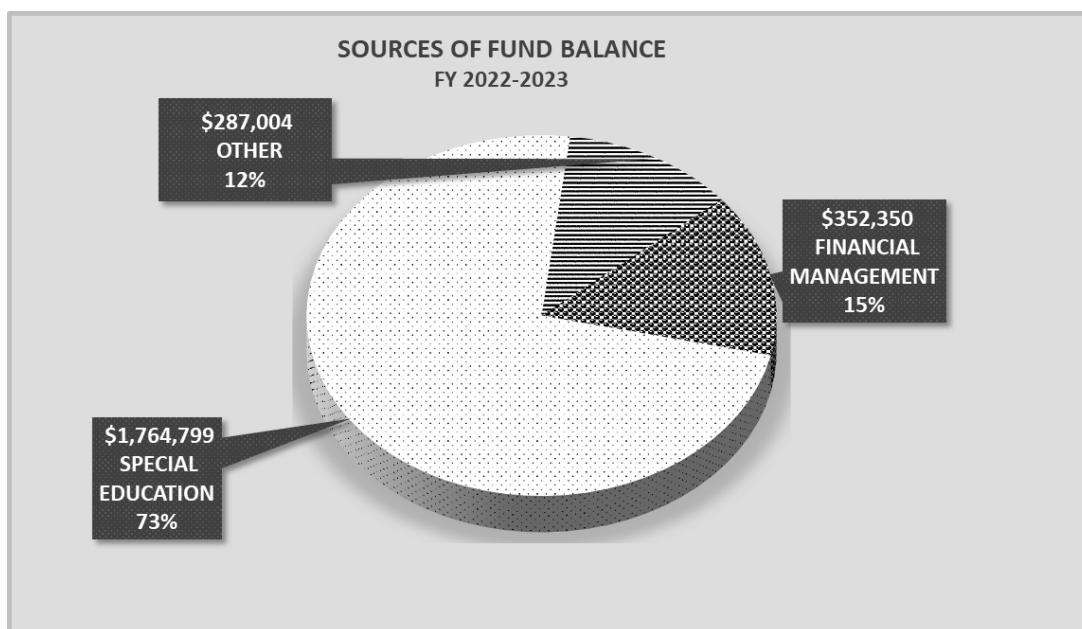
\$103,184 MEDICAL: The medical account was under budget \$103,184 due to the high staff turnover.

\$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.

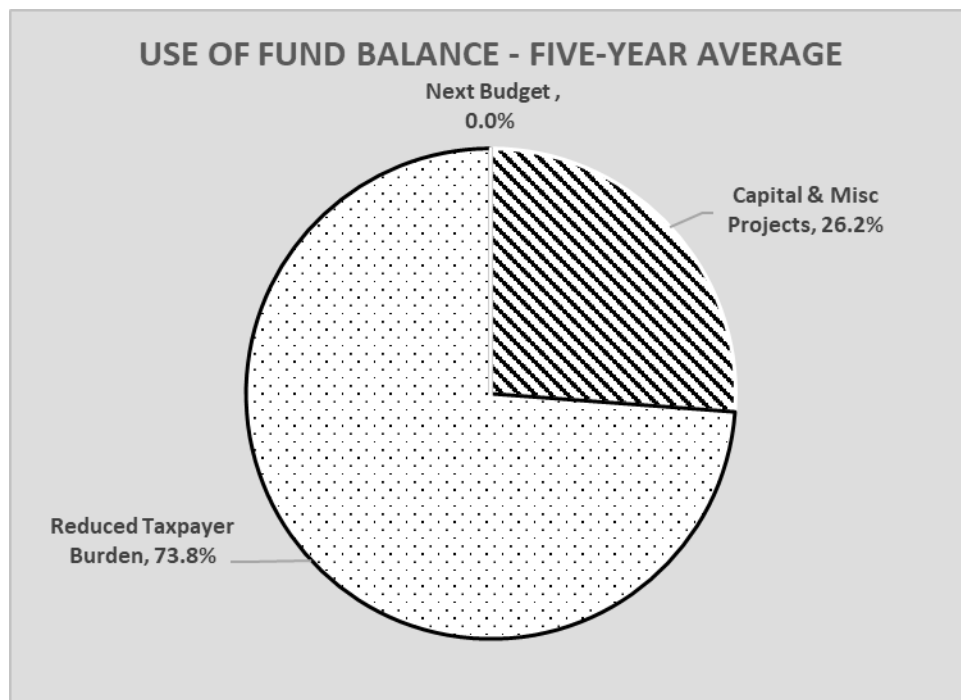
The primary sources of the fund balance are shown graphically below:



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 and unspent funds from FY23 will be credited to the member towns March allocation in 2024.

APPENDIX E

RECAP OF 2023-2024

Unspent Encumbrances Balance:

The cancellation of 2022-2023 encumbrances of \$59,412 were added to the fund balance credited to the member towns in March of 2025. 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 2023-2024 is \$991,628 plus \$1,091,054 designated for capital projects. The source of the available funds are described below.

FINANCIAL MANAGEMENT:

\$ 323,979

Our efforts to foster a District culture of finding cost savings and efficiencies has been successful producing savings of \$199,030. Grant money was applied for and awarded to offset the cost of the CEN and equipment for the broadcast journalism curriculum for savings of \$159,714. Used desks were purchased, saving approximately \$11,826. of maintenance work done by in-house staff rather than hiring contractors. The District saved \$46,215 on insurances partially due to implementing additional security measures to obtain a more favorable premium for cyber insurance. Custodial supplies were underspent by \$49,521 as supply closets were reorganized and inventories were used. Data processing programs were evaluated and consolidated saving \$16,375. The contingency account was not fully expended \$12,838.

SPECIAL EDUCATION:

\$ 295,125

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 District in the past 3 years help keep out of district costs down. The Districts receives revenue directly correlated to special education services and that revenue decreased by \$153,489 which is not reflected above.

OTHER:

\$1,463,218

\$470,174 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 long periods 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. Turnover savings were exceeded by \$284,218 and leave of absences were \$185,956.

\$28,905 PAYROLL TAXES: Due to lower than budgeted salaries, payroll taxes were underbudget.

\$752,473 MEDICAL: Claims were \$21,672 FAV and the stop-loss credits were \$162,682 FAV. Fees were \$96,937 FAV due to rebates credits applied from Anthem. Internally, the actual costs for employer contributions for H.S.A. accounts and actual employee premium contribution were \$83,585 FAV, OPEB credits for retirees are \$176,512 FAV, \$161,849 FAV of reserve applied, and grant funding are all favorable, \$49,142.

\$66,652 TEXTBOOKS & SUPPLIES: Staff utilized different resources than planned and Mr. Purcaro, Assistant Superintendent, negotiated favorable textbook pricing.

\$30,263 STAFF TRAVEL, CONFERENCES AND DUES & FEES (OTHER): Some staff did not attend conferences as planned due to resignations or scheduling constraints. This results in lower registration fees and travel costs. Several students competitions were still virtual, had capped the number of participants, and have not raised entry fees as anticipated.

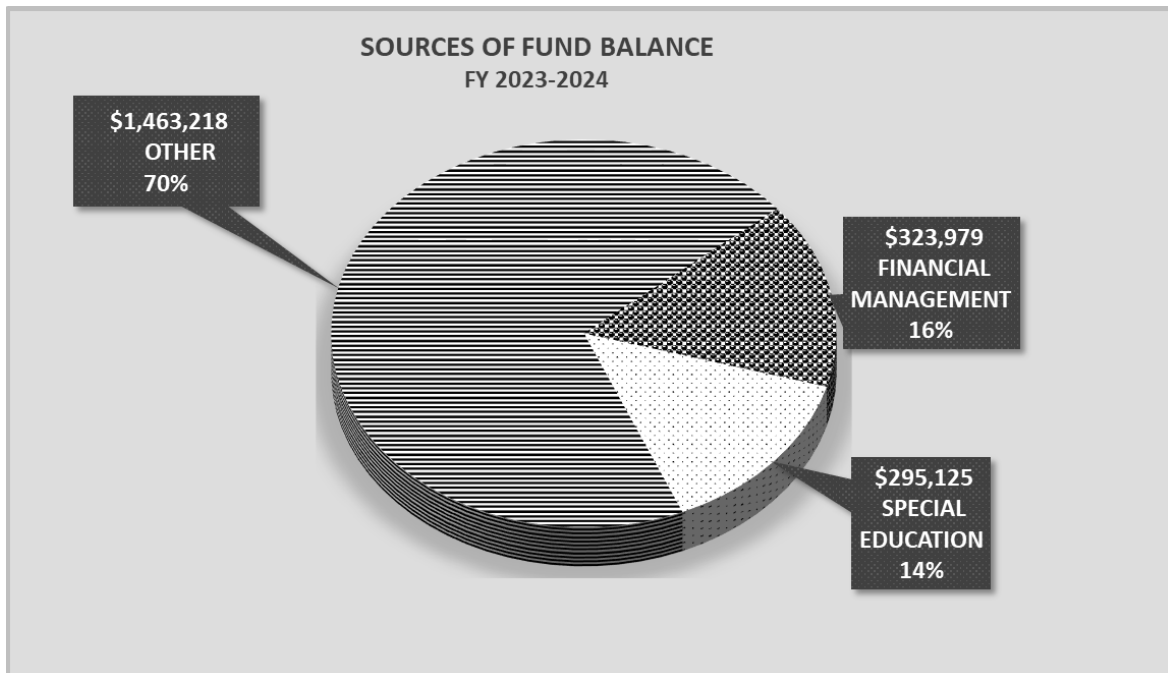
\$63,947 UTILITIES: Electricity, natural gas and oil were all under budget due to a mild winter and cooler spring.

\$19,750 OTHER PURCHASE SERVICES: Costs for printed programs for graduation, college fair, CPR training for athletics, and meeting refreshments were under budget.

\$16,375 DATA PROCESSING: Financial and human resources software were reviewed and utilized in an more efficient manner, allowing the cancellation of a program that bridged data between the two systems.

\$12,838 CONTINGENCY: The District did not need to utilize all of the contingency funds for unplanned purchases.

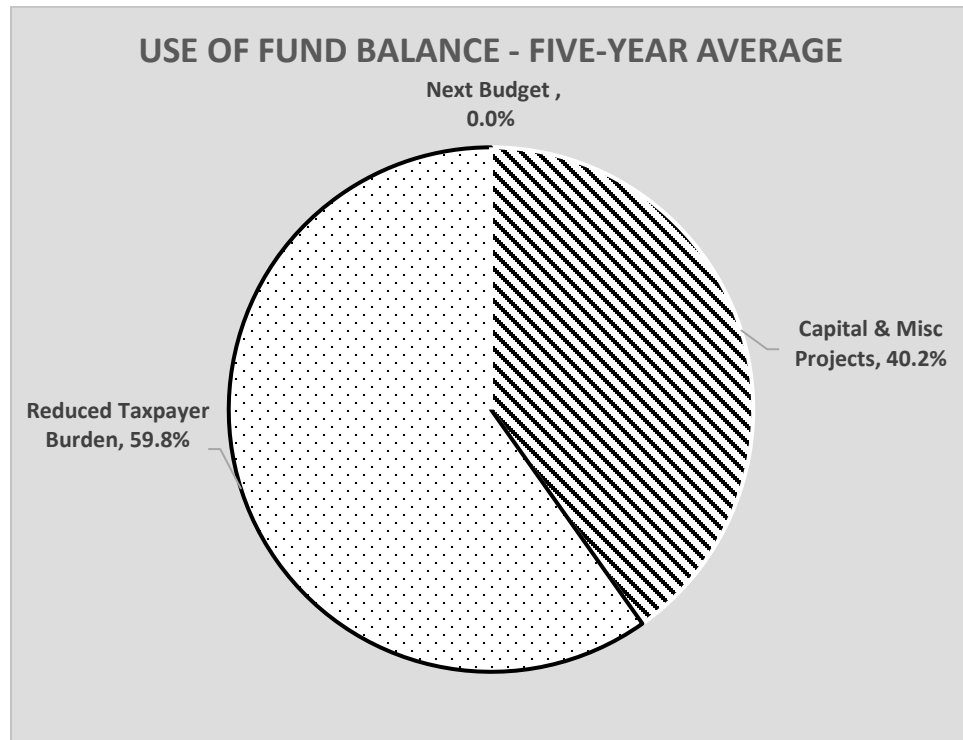
The primary sources of the fund balance are shown graphically below:



The use of the fund balance is proposed as follows:

1. **\$1,091,054 - 2.0%** was approved in September for designation to Educational Expenditure Reserve for the library media renovations.
2. **\$991,268** – Credit of unspent fund balance to member towns upon audit completion in March 2025.

The uses of the fund balance are shown graphically below:



Unspent Funds:

The Board of Education approved 2.0% or \$1,091,054 of the FY24 unspent funds transferred to the Educational Expenditure Reserve. The audited balance is \$991,268. The FY23 unspent encumbrances of \$59,412 and unspent funds from FY24 were credited to the member towns March allocation in 2025.

Amity Regional School District No. 5 - Budget Transfers 2024-2025

<u>MONTH/YR</u>	<u>JNL#</u>	<u>ACCOUNT NUMBER & DESCRIPTION</u>	<u>AMOUNT</u>	<u>DESCRIPTION</u>
JUL				
no entries				
AUG				
AUG '2024	7 1	-01-11-1014-5611 INSTRUCTIONAL SUPPLIES	\$ (10.00)	Hist. Membership To Ncss
AUG '2024	7 1	-01-11-1014-5810 DUES & FEES	\$ 10.00	Hist. Membership To Ncss
AUG '2024	51 1	-02-11-1009-5611 INSTRUCTIONAL SUPPLIES	\$ (1.00)	Textbook Purchase
AUG '2024	51 1	-02-11-1009-5641 TEXTBOOKS	\$ 1.00	Textbook Purchase
SEPT				
SEPT '2024	2 1	-02-13-2220-5611 INSTRUCTIONAL SUPPLIES	\$ (550.00)	Replace Broken Laminator
SEPT '2024	2 1	-02-13-2220-5731 EQUIPMENT - REPLACEMENT	\$ 550.00	Replace Broken Laminator
SEPT '2024	26 1	-01-11-1009-5611 INSTRUCTIONAL SUPPLIES	\$ (100.00)	Mathcounts Registration Increa
SEPT '2024	26 1	-01-11-1009-5810 DUES & FEES	\$ 100.00	Mathcounts Registration Increa
SEPT '2024	30 1	-02-14-2219-5611 INSTRUCTIONAL SUPPLIES	\$ (995.00)	To Purchase License For Class
SEPT '2024	30 1	-02-14-2350-5695 TECHNOLOGY SUPPLIES	\$ 995.00	To Purchase License For Class
SEPT '2024	175 1	-01-14-2350-5695 TECHNOLOGY SUPPLIES	\$ 685.00	Soundtrap-Added Enrollment
SEPT '2024	175 1	-01-11-1010-5330 OTHER PROFESSIONAL & TECH SRVC	\$ (685.00)	Soundtrap-Added Enrollment
SEPT '2024	182 1	-04-13-2190-5810 DUES & FEES	\$ (75.00)	Registration For Nyasp Connccas
SEPT '2024	182 1	-04-13-2190-5581 TRAVEL - CONFERENCES	\$ 75.00	Registration For Nyasp Connccas
OCT				
OCT '2024	15 1	-02-14-2350-5695 TECHNOLOGY SUPPLIES	\$ 119.00	Add. Subscrib.Flango-WI
OCT '2024	15 1	-02-11-1006-5611 INSTRUCTIONAL SUPPLIES	\$ (119.00)	Add. Subscrib.Flango-WI
OCT '2024	20 1	-04-12-1200-5611 INSTRUCTIONAL SUPPLIES	\$ (88.00)	Resource Supplies
OCT '2024	20 1	-04-12-1200-5690 OTHER SUPPLIES	\$ 88.00	Resource Supplies
OCT '2024	155 1	-01-13-2400-5810 DUES & FEES	\$ (50.00)	Regis. To Sci. & Eng. Fair
OCT '2024	155 1	-01-11-1013-5810 DUES & FEES	\$ 50.00	Regis. To Sci. & Eng. Fair
NOV				
NOV '2024	26 1	-02-11-1006-5611 INSTRUCTIONAL SUPPLIES	\$ (150.00)	For Virtual Author Visit
NOV '2024	26 1	-02-11-1006-5330 PROFESSIONAL & TECH SRVC	\$ 150.00	For Virtual Author Visit
NOV '2024	53 1	-01-13-2400-5330 PROFESSIONAL & TECH SRVC	\$ (523.00)	Desk For Principal
NOV '2024	53 1	-01-13-2400-5730 EQUIPMENT - NEW	\$ 523.00	Desk For Principal
NOV '2024	86 1	-05-14-2350-5695 TECHNOLOGY SUPPLIES	\$ 2,844.00	Raptor Safeschool Module
NOV '2024	86 1	-04-12-2151-5330 PROFESSIONAL & TECH SRVC	\$ (2,844.00)	Raptor Safeschool Module
NOV '2024	89 1	-05-14-2350-5695 TECHNOLOGY SUPPLIES	\$ (700.00)	Addition Subcript Piano Marvel
NOV '2024	89 1	-02-14-2350-5695 TECHNOLOGY SUPPLIES	\$ 700.00	Addition Subcript Piano Marvel
NOV '2024	124 1	-03-11-1010-5611 INSTRUCTIONAL SUPPLIES	\$ (1,070.00)	Transfer For Soundboard Replac
NOV '2024	124 1	-03-11-1010-5731 EQUIPMENT - REPLACEMENT	\$ 1,070.00	Old Soundboard Beyond Repair
DEC				
DEC '2024	14 1	-03-11-1018-5611 INSTRUCTIONAL SUPPLIES	\$ (600.00)	EI Teacher Laptop
DEC '2024	14 1	-03-11-1018-5732 EQUIPMENT-TECHNOLOGY-NEW	\$ 600.00	EI Teacher Laptop
DEC '2024	17 1	-03-11-1001-5733 EQUIPMENT-TECHNOLOGY-REPLACE	\$ (1,497.00)	Sweetwater Software
DEC '2024	17 1	-03-11-1010-5695 TECHNOLOGY SUPPLIES	\$ 1,497.00	Sweetwater Software
DEC '2024	27 1	-03-11-1009-5690 OTHER SUPPLIES	\$ 60.00	Math Team Supplies
DEC '2024	27 1	-03-11-1009-5641 TEXTBOOKS	\$ (60.00)	Math Team Supplies
DEC '2024	52 1	-02-13-2220-5330 PROFESSIONAL & TECH SRVC	\$ (125.00)	American Library Association
DEC '2024	52 1	-02-13-2220-5810 DUES & FEES	\$ 125.00	American Library Association
DEC '2024	163 1	-01-14-2600-5420 REPAIRS,MAINTENANCE & CLEANING	\$ (300.00)	Transfer For Fmx Software
DEC '2024	163 1	-05-14-2660-5695 TECHNOLOGY SUPPLIES	\$ 300.00	Transfer For Fmx Software
JAN' 2025				
JAN '2025	23 1	-05-13-2213-5322 INSTRUCTIONAL PROG IMPROVEMENT	\$ (2,475.00)	Building Thinking Classrooms
JAN '2025	23 1	-05-13-2212-5581 TRAVEL - CONFERENCES	\$ 2,475.00	Building Thinking Classrooms
JAN '2025	56 1	-05-13-2212-5322 INSTRUCTIONAL PROG IMPROVEMENT	\$ (500.00)	Bard Institute - Ela
JAN '2025	56 1	-05-13-2212-5581 TRAVEL - CONFERENCES	\$ 500.00	Bard Institute - Ela
JAN '2025	68 1	-01-13-2220-5611 INSTRUCTIONAL SUPPLIES	\$ (600.00)	Media Center Supplies
JAN '2025	68 1	-01-13-2220-5690 OTHER SUPPLIES	\$ 600.00	Media Center Supplies
JAN '2025	190 1	-04-12-6130-5560 TUITION EXPENSE	\$ (850.00)	Prnt Reimb Priv Plced Student
JAN '2025	190 1	-04-12-1200-5581 TRAVEL - CONFERENCES	\$ 850.00	Prnt Reimb Priv Plced Student
JAN '2025	191 1	-04-12-1200-5330 PROFESSIONAL & TECH SRVC	\$ 599.00	Educere Phys Ed Class-3 Studen
JAN '2025	191 1	-03-13-2120-5590 OTHER PURCHASED SERVICES	\$ (599.00)	Educere Phys Ed Class-3 Studen
JAN '2025	227 1	-05-13-2213-5322 INSTRUCTIONAL PROG IMPROVEMENT	\$ (1,489.00)	Syst.Instr.Impr.Prg Membership
JAN '2025	227 1	-05-13-2213-5810 DUES & FEES	\$ 1,489.00	Syst.Instr.Impr.Prg Membership
FEB' 2025				
FEB' 2025	43 1	-01-13-2400-5330 PROFESSIONAL & TECH SRVC	\$ (1,235.00)	Phys Ed. Speaker System
FEB' 2025	43 1	-01-13-2400-5730 EQUIPMENT - NEW	\$ 1,235.00	Phys Ed. Speaker System
FEB' 2025	49 1	-01-14-2350-5695 TECHNOLOGY SUPPLIES	\$ 855.00	Infobase Database For Amsb Ss

Amity Regional School District No. 5 - Budget Transfers 2024-2025

<u>MONTH/YR</u>	<u>JNL#</u>	<u>ACCOUNT NUMBER & DESCRIPTION</u>	<u>AMOUNT</u>	<u>DESCRIPTION</u>
FEB' 2025	49 1	-01-13-2220-5642 LIBRARY BOOKS & PERIODICALS	\$ (855.00)	Infobase Database For Amsb Ss
FEB' 2025	64 1	-05-13-2212-5590 OTHER PURCHASED SERVICES	\$ (148.00)	Gold Pen Award Ceremony
FEB' 2025	64 1	-05-13-2213-5590 OTHER PURCHASED SERVICES	\$ 148.00	Gold Pen Award Ceremony
FEB' 2025	87 1	-02-13-2220-5330 PROFESSIONAL & TECH SRVC	\$ (125.00)	American Library Assoc. Dues
FEB' 2025	87 1	-02-13-2220-5810 DUES & FEES	\$ 125.00	American Library Assoc. Dues
FEB' 2025	91 1	-05-11-1005-5611 INSTRUCTIONAL SUPPLIES	\$ (2,600.00)	Books Amsb Amso Reading
FEB' 2025	91 1	-05-11-1005-5641 TEXTBOOKS	\$ 2,600.00	Books Amsb Amso Reading
FEB' 2025	94 1	-03-14-2600-5613 MAINTENANCE/CUSTODIAL SUPPLIES	\$ (440.00)	Transfer For Office Chair
FEB' 2025	94 1	-03-14-2600-5731 EQUIPMENT - REPLACEMENT	\$ 440.00	Transfer For Office Chair
FEB' 2025	189 1	-02-13-2220-5642 LIBRARY BOOKS & PERIODICALS	\$ (253.00)	Advisory Group Book Party
FEB' 2025	189 1	-02-13-2220-5690 OTHER SUPPLIES	\$ 253.00	Advisory Group Book Party
FEB' 2025	192 1	-01-13-2400-5330 PROFESSIONAL & TECH SRVC	\$ (111.00)	Phys Ed Equipment/Microphones
FEB' 2025	192 1	-01-13-2400-5730 EQUIPMENT - NEW	\$ 111.00	Phys Ed Equipment/Microphones
MAR '2025				
MAR '2025	27 1	-02-11-1013-5611 INSTRUCTIONAL SUPPLIES	\$ 400.00	Add'L Instruc. Supplies Needed
MAR '2025	27 1	-02-11-1013-5690 OTHER SUPPLIES	\$ (400.00)	Add'L Instruc. Supplies Needed
MAR '2025	78 1	-03-11-1011-5330 PROFESSIONAL & TECH SRVC	\$ (500.00)	Move To Instructional Supplies
MAR '2025	78 1	-03-11-1011-5611 INSTRUCTIONAL SUPPLIES	\$ 500.00	Move To Instructional Supplies
MAR '2025	85 1	-03-11-1001-5611 INSTRUCTIONAL SUPPLIES	\$ (600.00)	Transfer To 5420 For Kiln Part
MAR '2025	85 1	-03-11-1001-5420 REPAIRS,MAINTENANCE & CLEANING	\$ 600.00	New Kiln Lid And Shelves Need
MAR '2025	92 1	-01-11-1011-5420 REPAIRS,MAINTENANCE & CLEANING	\$ (1,000.00)	Gaga Pit
MAR '2025	92 1	-01-11-1011-5611 INSTRUCTIONAL SUPPLIES	\$ (700.00)	Gaga Pit
MAR '2025	92 1	-01-11-1011-5730 EQUIPMENT - NEW	\$ 1,700.00	Gaga Pit
MAR '2025	97 1	-01-13-2220-5330 PROFESSIONAL & TECH SRVC	\$ (1,159.00)	Teacher Appreciation
MAR '2025	97 1	-01-14-2219-5690 OTHER SUPPLIES	\$ 1,159.00	Teacher Appreciation
MAR '2025	116 1	-03-11-1006-5611 INSTRUCTIONAL SUPPLIES	\$ (600.00)	Wireless Mouse Replacements
MAR '2025	116 1	-03-11-1006-5733 EQUIPMENT-TECHNOLOGY-REPLACE	\$ 600.00	Wireless Mouse Replacements
MAR '2025	120 1	-03-13-2220-5690 OTHER SUPPLIES	\$ (500.00)	Transfer To Purchase Books
MAR '2025	120 1	-03-13-2220-5642 LIBRARY BOOKS & PERIODICALS	\$ 500.00	Transfer To Purchase Books
MAR '2025	132 1	-03-11-1014-5690 OTHER SUPPLIES	\$ (90.00)	New Britain Museum Of Art Wksh
MAR '2025	132 1	-03-11-1014-5810 DUES & FEES	\$ 90.00	New Britain Museum Of Art Wksh
MAR '2025	140 1	-04-12-1206-5330 PROFESSIONAL & TECH SRVC	\$ (800.00)	Virtual Education Delivery
MAR '2025	140 1	-04-12-1200-5330 PROFESSIONAL & TECH SRVC	\$ 800.00	Virtual Education Delivery
MAR '2025	153 1	-03-11-1009-5695 PROFESSIONAL & TECH SRVC	\$ (300.00)	Fees And Cords
MAR '2025	153 1	-03-11-1009-5810 DUES & FEES	\$ 300.00	Fees And Cords
MAR '2025	154 1	-03-11-1010-5810 DUES & FEES	\$ (218.00)	Transfer For Music Fest Tech
MAR '2025	154 1	-03-11-1010-5330 PROFESSIONAL & TECH SRVC	\$ 218.00	Transfer For Music Fest Tech
MAR '2025	155 1	-03-11-1010-5440 RENTALS-LAND,BLDG,EQUIPMENT	\$ (500.00)	For Tech Service Rentals Eoy
MAR '2025	155 1	-03-11-1010-5330 PROFESSIONAL & TECH SRVC	\$ 500.00	For Tech Service Rentals Eoy
MAR '2025	172 1	-03-13-2120-5590 OTHER PURCHASED SERVICES	\$ (2,000.00)	Travel-Uelp And Conferences
MAR '2025	172 1	-03-13-2120-5581 TRAVEL - CONFERENCES	\$ 2,000.00	Travel-Uelp And Conferences
MAR '2025	181 1	-03-11-1005-5641 TEXTBOOKS	\$ (500.00)	Need Journals And Certificates
MAR '2025	181 1	-03-11-1005-5611 INSTRUCTIONAL SUPPLIES	\$ 500.00	Need Journals And Certificates
MAR '2025	183 1	-05-11-1005-5611 INSTRUCTIONAL SUPPLIES	\$ (2,700.00)	Books For Middle Schools Ela
MAR '2025	183 1	-05-11-1005-5641 TEXTBOOKS	\$ 2,700.00	Books For Middle Schools Ela
MAR '2025	184 1	-03-14-2600-5613 MAINTENANCE/CUSTODIAL SUPPLIES	\$ (1,081.56)	Replace Broken Vacuum
MAR '2025	184 1	-03-14-2600-5731 EQUIPMENT - REPLACEMENT	\$ 1,081.56	Replace Broken Vacuum

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 2024-2025**

Date: March 25, 2025

Facilities:

Mr. Martoni is requesting a transfer to cover the increased charges on electricity bills. The electricity accounts are expected to be \$167,000 over budget due to the public benefit charges. The current request is to draw down the remaining facilities contingency account and transfer the funds into the utility accounts. The purchase order amounts need to be increase and the accounts do not have enough funds.

For the Amity Finance Committee:

Recommend the Amity Board of Education approve...

For the Amity Board of Education:

Move to approve this transfer for utilities invoices.

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
05-14-2600-5715	Facilities Contingency	\$80,715	
05-15-0000-5850	Contingency-District	\$60,000	
01-14-2600-5410	Utilities		\$20,000
02-14-2600-5410	Utilities		\$20,000
03-14-2600-5410	Utilities		\$100,715

CNR Q3 FY25

FUND	ORG	OBJ	ACCOUNT DESCRIPTION	ORIGINAL APPROP	TRANSFERS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	% USED
17	00150047	5720	IMPROV-SIT	3,067,849	284,703	3,352,552	3,352,552	-	-	100.00
	00150047		Total 00150047 Athletics Facility P	3,067,849	284,703	3,352,552	3,352,552	-	-	100.00
17	00150048	5715	IMPROV-BLD	1,830,630	234,042	2,064,672	2,064,672	-	-	100.00
	00150048		Total 00150048 HVAC AHS 2020 BOND	1,830,630	234,042	2,064,672	2,064,672	-	-	100.00
17	00150049	5715	IMPROV-BLD	140,000	100,906	240,906	240,906	-	-	100.00
	00150049		Total 00150049 CHILLERS REFURBISH A	140,000	100,906	240,906	240,906	-	-	100.00
17	00150050	5715	IMPROV-BLD	600,000	-67,967	532,033	532,033	-	-	114.90
	00150050		Total 00150050 PAVING AHS	600,000	-67,967	532,033	532,033	-	-	114.90
17	00150051	5330	PROF&TECH	108,018	-39,156	68,862	68,862	-	-	100.00
	00150051		Total 00150051 BOND CLOSING COSTS	108,018	-39,156	68,862	68,862	-	-	100.00
17	00150052	5715	IMPROV-BLD	245,000	-164,390	80,610	80,610	-	-	100.00
	00150052		Total 00150052 ACOUSTICAL IMPROVEME	245,000	-164,390	80,610	80,610	-	-	100.00
17	00150053	5715	IMPROV-BLD	587,453	-357,088	230,365	221,812	-	8,554	96.30
	00150053		Total 00150053 2020 Bond Contingenc	587,453	-357,088	230,365	221,812	-	8,554	96.30
17	00150054	5715	IMPROV-BLD	495,482	0	495,482	420,827	73,965	690	99.90
	00150054		Total 00150054 AHS ROOF REPLACEMENT	495,482	0	495,482	420,827	73,965	690	99.90
17	00150055	5715	IMPROV-BLD	110,000	395,948	505,948	505,948	-	-	100.00
	00150055		Total 00150055 LECTURE HALL RENOVAT	110,000	395,948	505,948	505,948	-	-	100.00
17	00150060	5420	REP,MAINT	100,000	0	100,000	42,296	-	57,704	42.30
	00150060		Total 00150060 LIGHTING PROJECT	100,000	0	100,000	42,296	-	57,704	42.30
17	00150061	5731	EQUIP-REPL	190,075	-1	190,074	190,074	-	-	100.00
	00150061		Total 00150061 MUSIC INSTRUMENTS	190,075	-1	190,074	190,074	-	-	100.00
17	00150062	5715	IMPROV-BLD	331,500	66,143	397,643	397,643	-	-	100.00
	00150062		Total 00150062 AMSB ROOF PROJECT	331,500	66,143	397,643	397,643	-	-	100.00
17	00150063	5715	IMPROV-BLD	382,000	108,748	490,748	490,748	-	-	100.00
	00150063		Total 00150063 AMSO ROOF PROJECT	382,000	108,748	490,748	490,748	-	-	100.00
17	00150064	5420	REP,MAINT	35,000	85,193	120,193	-	-	120,193	0.00
	00150064		Total 00150064 AHS ALL WEATHER FIEL	35,000	85,193	120,193	-	-	120,193	0.00
17	00150065	5715	IMPROV-BLD	1,066,995	807,096	1,874,091	26,416	50,960	1,796,716	4.10
	00150065		Total 00150065 AHS LMC RENOVATION	1,066,995	807,096	1,874,091	26,416	50,960	1,796,716	4.10
17			Grand Total Reserve Fund for Capital	9,290,002	1,454,177	10,744,179	8,635,398	124,925	1,983,857	264.60

Q3 FY25 ED RESERVE

ORG	OBJ	ACCOUNT DESCRIPTION	ORIGINAL APPROP	TRANFRS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	% USED
00150100	5715	IMPROV-BLD	1,091,054	0	1,091,054	0.00	0.00	1,091,054	0.00
00150100		Total 00150100 LMC RENOVATIONS	1,091,054	0	1,091,054	0.00	0.00	1,091,054	0.00
		Grand Total	1,091,054	0	1,091,054	0.00	0.00	1,091,054	0.00

Q3 FY25 GRANTS

ORG	OBJ	ACCOUNT DESCRIPTION	ORIGINAL APPROP	TRANFRS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	% USED
00008985	5330	PROF&TECH	5,000	0	5,000	3,100	0	1,900	62.00
00008985	5715	IMPROV-BLD	150,864	-57,787	93,077	78,321	0	14,755	84.10
00008985	5720	IMPROV-SIT	26,000	0	26,000	26,000	0	0	100.00
00008985	5730	EQUIP-NEW	10,000	35,270	45,270	44,954	0	315	99.30
00008985	5731	EQUIP-REPL	10,000	0	10,000	792	0	9,208	7.90
00008985		Total 00008985 FEMA COVID-19	201,864	-22,517	179,346	153,167	0	26,179	85.40
00008986	700	PROPERTY	24,300	0	24,300	24,300	0	0	100.00
00008986		Total 00008986 PEGPETIA GRANT FY22	24,300	0	24,300	24,300	0	0	100.00
00008987	600	SUPPLIES	916	444	1,360	1,360	0	0	100.00
00008987	700	PROPERTY	45,513	-444	45,069	45,069	0	0	100.00
00008987		Total 00008987 PERKINS SUPPLEMENTAL	46,429	0	46,429	46,429	0	0	100.00
00008988	5899	UNDESIGNAT	13,199	0	13,199	13,199	0	0	100.00
00008988		Total 00008988 CAC FY23	13,199	0	13,199	13,199	0	0	100.00
00008989	111B	TEACH SAL	3,000	0	3,000	3,000	0	0	100.00
00008989	300	PROFESSION	7,000	0	7,000	7,000	0	0	100.00
00008989		Total 00008989 SPED STIPEND \$10K	10,000	0	10,000	10,000	0	0	100.00
00008990	100	SALARIES	55,593	0	55,593	55,593	0	0	100.00
00008990	200	MEDICARE	20,347	0	20,347	20,347	0	0	100.00
00008990	600	SUPPLIES	1,000	0	1,000	1,000	0	0	100.00
00008990		Total 00008990 TITLE I 2022-2024	76,940	0	76,940	76,940	0	0	100.00
00008991	100	SALARIES	16,290	0	16,290	16,290	0	0	100.00
00008991	300	PROFESSION	10,809	0	10,809	10,809	0	0	100.00
00008991	500	OTHER PURC	1,640	0	1,640	1,640	0	0	100.00
00008991		Total 00008991 TITLE II 2022-2024	28,739	0	28,739	28,739	0	0	100.00
00008992	100	SALARIES	10,000	0	10,000	10,000	0	0	100.00
00008992		Total 00008992 TITLE IV 2022-2024	10,000	0	10,000	10,000	0	0	100.00
00008993	300	PROFESSION	1,000	0	1,000	1,000	0	0	100.00
00008993	600	SUPPLIES	1,262	0	1,262	1,262	0	0	100.00
00008993		Total 00008993 TITLE III 2022-2024	2,262	0	2,262	2,262	0	0	100.00
00008994	100	SALARIES	72,000	0	72,000	72,000	0	0	100.00
00008994	111NP	TEACH NP	500	-500	0	-	0	0	0.00
00008994	112	SALARIES N	302,491	0	302,491	302,491	0	0	100.00
00008994	200	MEDICARE	37,145	0	37,145	37,145	0	0	100.00
00008994	321	TUTORS	6,500	0	6,500	6,500	0	0	100.00
00008994	322	INSTR PROG	2,500	5,300	7,800	7,800	0	0	100.00

Q3 FY25 GRANTS

ORG	OBJ	ACCOUNT DESCRIPTION	ORIGINAL APPROP	TRANFRS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	% USED
00008994	324	FIELD TRIP	12,000	-4,000	8,000	8,000	0	0	100.00
00008994	325	PARENT ACT	500	0	500	500	0	0	100.00
00008994	440	RENTALS (L	4,500	0	4,500	4,500	0	0	100.00
00008994	600	SUPPLIES	4,867	-1,300	3,567	3,567	0	0	100.00
00008994	600NP	SUPPLY NP	2,490	500	2,990	2,990	0	0	100.00
00008994	734	tech hard	750	0	750	750	0	0	100.00
00008994		Total 00008994 IDEA FY 2022-2024	446,243	0	446,243	446,243	0	0	100.00
00008995	320	PROF EDUC	990	0	990	990	0	0	100.00
00008995	330	OTHER PROF	5,360	0	5,360	5,360	0	0	100.00
00008995	510	TRANSPORTA	2,500	-945	1,555	1,555	0	0	100.00
00008995	600	SUPPLIES	16,249	1,220	17,469	17,469	0	0	100.00
00008995	700	PROPERTY	17,231	-275	16,956	16,956	0	0	100.00
00008995		Total 00008995 CARL PERKINS FY23	42,330	0	42,330	42,330	0	0	100.00
00008996	5899	UNDESIGNAT	18,047	101,994	120,041	120,041	0	0	100.00
00008996		Total 00008996 OPEN CHOICE FY23	18,047	101,994	120,041	120,041	0	0	100.00
00008997	100	SALARIES	1,241	0	1,241	1,241	0	0	100.00
00008997		Total 00008997 TEAM MENTOR FY23	1,241	0	1,241	1,241	0	0	100.00
00008998	111A	ADMIN SAL	1,000	250	1,250	1,250	0	0	100.00
00008998	111B	TEACH SAL	14,000	-100	13,900	13,900	0	0	100.00
00008998	322NP	INSTR NP	750	0	750	750	0	0	100.00
00008998		Total 00008998 CT-SEDS FY23	15,750	150	15,900	15,900	0	0	100.00
00008999	700	PROPERTY	59,706	0	59,706	59,706	0	0	100.00
00008999		Total 00008999 PEGPETIA GRANT FY23	59,706	0	59,706	59,706	0	0	100.00
00009000	600	SUPPLIES	98	6,594	6,692	5,275	0	1,417	78.80
00009000	700	PROPERTY	2,025	0	2,025	2,025	0	0	100.00
00009000		Total 00009000 One-Time Grants	2,123	6,594	8,717	7,300	0	1,417	83.70
00009001	600	SUPPLIES	600	997	1,597	1,597	0	0	100.00
00009001	700	PROPERTY	0	0	0	-	0	0	0.00
00009001		Total 00009001 ONE TIME FY 2011 FOR	600	997	1,597	1,597	0	0	100.00
00009002	600	SUPPLIES	2,500	12,000	14,500	5,290	0	9,210	36.50
00009002	700	PROPERTY	0	0	0	-	0	0	0.00
00009002		Total 00009002 Science Research Awa	2,500	12,000	14,500	5,290	0	9,210	36.50
00009003	5899	UNDESIGNAT	1,421	52,932	54,353	24,229	0	30,125	44.60
00009003		Total 00009003 MEDICAID GRANT	1,421	52,932	54,353	24,229	0	30,125	44.60
00009004	5899	UNDESIGNAT	500	0	500	130	0	370	26.00

Q3 FY25 GRANTS

ORG	OBJ	ACCOUNT DESCRIPTION	ORIGINAL APPROP	TRANFRS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	% USED
00009004		Total 00009004 PRESCRIPTION DRUG SA	500	0	500	130	0	370	26.00
00009005	5899	UNDESIGNAT	2,400	31,926	34,326	19,248	229	14,849	56.70
00009005		Total 00009005 CBITS SUSTAINABILITY	2,400	31,926	34,326	19,248	229	14,849	56.70
00009030	5899	UNDESIGNAT	30,010	97,949	127,959	116,557	11402	0	100.00
00009030		Total 00009030 OPEN CHOICE FY24	30,010	97,949	127,959	116,557	11402	0	100.00
00009031	100	SALARIES	26,166	0	26,166	26,166	0	0	100.00
00009031	300	PROFESSION	25,762	0	25,762	25,762	0	0	100.00
00009031	600	SUPPLIES	26,000	0	26,000	26,000	0	0	100.00
00009031		Total 00009031 TITLE I 2023-2025	77,928	0	77,928	77,928	0	0	100.00
00009032	100	SALARIES	16,409	0	16,409	-	0	16,409	0.00
00009032	300	PROFESSION	11,653	0	11,653	5,633	6020	0	100.00
00009032	500	OTHER PURC	1,640	0	1,640	778	862	0	100.00
00009032		Total 00009032 TITLE II 2023-2025	29,702	0	29,702	6,411	6882	16,409	44.80
00009033	300	PROFESSION	1,000	0	1,000	485	0	515	48.50
00009033	600	SUPPLIES	1,226	0	1,226	1,001	0	224	81.70
00009033		Total 00009033 TITLE III 2023-2025	2,226	0	2,226	1,486	0	739	66.80
00009034	100	SALARIES	10,000	0	10,000	10,000	0	0	100.00
00009034		Total 00009034 TITLE IV 2023-2025	10,000	0	10,000	10,000	0	0	100.00
00009035	100	SALARIES	66,378	0	66,378	66,378	0	0	100.00
00009035	112	SALARIES N	375,274	-37,145	338,129	338,129	0	0	100.00
00009035	200	MEDICARE	37,145	0	37,145	37,145	0	0	100.00
00009035	322	INSTR PROG	807	0	807	555	0	252	68.80
00009035	324	FIELD TRIP	10,000	-2,500	7,500	4,036	1617	1,848	75.40
00009035	325	PARENT ACT	500	0	500	99	0	401	19.90
00009035	580	TRAVEL-STA	4,500	2,500	7,000	6,849	0	151	97.80
00009035	600	SUPPLIES	4,702	0	4,702	4,536	166	0	100.00
00009035	600NP	SUPPLY NP	1,672	0	1,672	1,672	0	0	100.00
00009035	734	tech hard	500	0	500	500	0	0	100.00
00009035		Total 00009035 IDEA FY 2023-2025	501,477	-37,145	464,332	459,899	1782	2,651	99.40
00009036	5899	UNDESIGNAT	7,119	0	7,119	7,119	0	0	100.00
00009036		Total 00009036 CAC FY24	7,119	0	7,119	7,119	0	0	100.00
00009037	100	SALARIES	24,875	0	24,875	7,833	0	17,042	31.50
00009037	300	PROFESSION	6,250	0	6,250	3,000	0	3,250	48.00
00009037	500	OTHER PURC	9,000	0	9,000	-	0	9,000	0.00
00009037	600	SUPPLIES	19,875	0	19,875	-	0	19,875	0.00

Q3 FY25 GRANTS

ORG	OBJ	ACCOUNT DESCRIPTION	ORIGINAL APPROP	TRANFRS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	% USED
00009037		Total 00009037 ARPA-DUAL CREDIT EXP	60,000	0	60,000	10,833	0	49,167	18.10
00009038	100	SALARIES	56,211	-1,627	54,584	54,584	0	0	100.00
00009038	200	MEDICARE	12,000	0	12,000	12,000	0	0	100.00
00009038	600	SUPPLIES	1,627	0	1,627	1,627	0	0	100.00
00009038		Total 00009038 ARPA-SCHOOL MENTAL H	69,838	-1,627	68,211	68,211	0	0	100.00
00009039	5732	EQ-TECH-N	74,433	0	74,433	-	56800	17,633	76.30
00009039		Total 00009039 EMERGENCY CONNECTIVI	74,433	0	74,433	-	56800	17,633	76.30
00009040	111B	TEACH SAL	507	134	641	641	0	0	100.00
00009040	330	OTHER PROF	1,550	-42	1,508	1,508	0	0	100.00
00009040	510	TRANSPORTA	1,450	-1,450	0	-	0	0	0.00
00009040	580	TRAVEL-STA	4,000	-857	3,143	3,143	0	0	100.00
00009040	600	SUPPLIES	21,088	2,215	23,303	23,303	0	0	100.00
00009040	700	PROPERTY	16,698	0	16,698	16,698	0	0	100.00
00009040		Total 00009040 CARL PERKINS FY24	45,293	0	45,293	45,293	0	0	100.00
00009041	100	SALARIES	1,225	0	1,225	1,225	0	0	100.00
00009041		Total 00009041 TEAM MENTOR FY24	1,225	0	1,225	1,225	0	0	100.00
00009042	320	PROF EDUC	1,000	0	1,000	1,000	0	0	100.00
00009042	324	FIELD TRIP	250	0	250	250	0	0	100.00
00009042	510	TRANSPORTA	6,422	0	6,422	6,422	0	0	100.00
00009042	600	SUPPLIES	1,344	0	1,344	1,344	0	0	100.00
00009042	730	EQUIPMENT-	5,324	0	5,324	5,324	0	0	100.00
00009042	734	tech hard	660	0	660	660	0	0	100.00
00009042		Total 00009042 IDEA TRANSITION SUPP	15,000	0	15,000	15,000	0	0	100.00
00009043	322	INSTR PROG	5,000	0	5,000	4,675	325	0	100.00
00009043		Total 00009043 IDEA EXTENDED SUPPOR	5,000	0	5,000	4,675	325	0	100.00
00009044	700	PROPERTY	20,433	0	20,433	20,433	0	0	100.00
00009044		Total 00009044 PEGPETIA GRANT FY24	20,433	0	20,433	20,433	0	0	100.00
00009045	5899	UNDESIGNAT	31,990	46,251	78,241	81,271	38090	-41,120	152.60
00009045		Total 00009045 OPEN CHOICE FY25	31,990	46,251	78,241	81,271	38090	-41,120	152.60
00009046	5899	UNDESIGNAT	10,000	0	10,000	10,000	0	0	100.00
00009046		Total 00009046 CAC FY25	10,000	0	10,000	10,000	0	0	100.00
00009047	100	SALARIES	28,616	16,500	45,116	27,404	14281	3,431	92.40
00009047	300	PROFESSION	19,027	0	19,027	-	9856	9,172	51.80
00009047	600	SUPPLIES	21,716	-16,500	5,216	-	1214	4,002	23.30
00009047		Total 00009047 TITLE I 2024-2026	69,359	0	69,359	27,404	25351	16,605	76.10

Q3 FY25 GRANTS

ORG	OBJ	ACCOUNT DESCRIPTION	ORIGINAL APPROP	TRANFRS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	% USED
00009048	100	SALARIES	14,040	0	14,040	-	0	14,040	0.00
00009048	300	PROFESSION	11,653	0	11,653	-	0	11,653	0.00
00009048	500	OTHER PURC	1,640	0	1,640	-	0	1,640	0.00
00009048		Total 00009048 TITLE II 2024-2026	27,333	0	27,333	-	0	27,333	0.00
00009049	300	PROFESSION	0	0	0	-	0	0	0.00
00009049	600	SUPPLIES	0	0	0	-	0	0	0.00
00009049		Total 00009049 TITLE III 2024-2026	0	0	0	-	0	0	0.00
00009050	100	SALARIES	6,000	0	6,000	-	0	6,000	0.00
00009050	300	PROFESSION	4,000	0	4,000	-	0	4,000	0.00
00009050		Total 00009050 TITLE IV 2022-2026	10,000	0	10,000	-	0	10,000	0.00
00009051	100	SALARIES	54,812	0	54,812	23,673	32429	-1,291	102.40
00009051	112	SALARIES N	383,938	0	383,938	124,366	98502	161,070	58.00
00009051	200	MEDICARE	5,310	0	5,310	-	0	5,310	0.00
00009051	322	INSTR PROG	1,680	0	1,680	-	0	1,680	0.00
00009051	324	FIELD TRIP	9,000	0	9,000	-	0	9,000	0.00
00009051	325	PARENT ACT	475	0	475	-	0	475	0.00
00009051	580	TRAVEL-STA	8,125	0	8,125	-	0	8,125	0.00
00009051	600	SUPPLIES	7,121	0	7,121	-	0	7,121	0.00
00009051	600NP	SUPPLY NP	1,652	0	1,652	-	0	1,652	0.00
00009051		Total 00009051 IDEA FY 2024-2026	472,113	0	472,113	148,039	130931	193,142	59.10
00009052	100	SALARIES	56,211	0	56,211	30,306	19458	6,448	88.50
00009052	200	MEDICARE	12,000	0	12,000	7,354	0	4,646	61.30
00009052		Total 00009052 ARPA-SCHOOL MENTAL H	68,211	0	68,211	37,660	19458	11,094	83.70
00009053	111B	TEACH SAL	2,992	0	2,992	886	0	2,106	29.60
00009053	330	OTHER PROF	5,603	-452	5,151	5,106	0	45	99.10
00009053	510	TRANSPORTA	1,950	651	2,601	307	1196	1,097	57.80
00009053	580	TRAVEL-STA	4,950	189	5,139	1,335	3541	264	94.90
00009053	600	SUPPLIES	21,977	0	21,977	18,498	2192	1,287	94.10
00009053	700	PROPERTY	4,858	-388	4,470	4,469	0	1	100.00
00009053		Total 00009053 CARL PERKINS FY25	42,330	0	42,330	30,601	6929	4,800	88.70
		Grand Total	2,687,614	289,503	2,977,118	2,288,336	298180	390,602	86.90

Students

Connecticut School Climate Policy

Policy Statement

All schools must support and promote teaching and learning environments where all students thrive academically and socially, have a strong and meaningful voice, and are prepared for lifelong success.

Implementation of the following set of guiding principles and systemic strategies will promote a positive school climate, which is essential to achieving these goals.

This policy sets forth the framework for an effective and informed school climate improvement process, which includes a continuous cycle of (i) planning and preparation, (ii) evaluation, (iii) action planning, and (iv) implementation, and serves to actualize the Connecticut School Climate Standards, as detailed herein.

The Board recognizes that improving school climate is contextual. Each school needs to consider its history, strengths, needs, and goals. Furthermore, this policy will support and promote the development of restorative action plans that will create and sustain safe and equitable learning environments.

The Amity Regional School District No. 5 Board of Education adopts this policy.

Definitions

1. **“School climate”** means the quality and character of the school life, with a particular focus on the quality of the relationships within the school community, and which is based on patterns of people's experiences of school life and that reflects the norms, goals, values, interpersonal relationships, teaching, learning, leadership practices and organizational structures within the school community.
2. **“Positive Sustained School Climate”** is the foundation for learning and positive youth development and includes:
 - a. Norms, values, and expectations that support people feeling socially, emotionally, culturally, racially, intellectually, and physically safe.
 - b. People who treat one another with dignity and are engaged, respected and solve problems restoratively.
 - c. A school community that works collaboratively together to develop, live, and contribute to a shared school vision.
 - d. Adults who model and nurture attitudes that emphasize the benefits and satisfaction gained from learning; and
 - e. A school community that contributes to the operations of the school and the care of the physical environment.

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Connecticut School Climate Policy

Definitions (continued)

3. **“Social and emotional learning”** means the process through which children and adults achieve emotional intelligence through the competencies of self-awareness, self-management, social awareness, relationship skills and responsible decision-making.
4. **“Emotional intelligence”** means the ability to (A) perceive, recognize, and understand emotions in oneself or others, (B) use emotions to facilitate cognitive activities, including, but not limited to, reasoning, problem solving and interpersonal communication, (C) understand and identify emotions, and (D) manage emotions in oneself and others.
5. **“Bullying”** means unwanted and aggressive behavior among children in grades kindergarten to twelve, inclusive, that involves a real or perceived power imbalance.
6. **“School environment”** means a school-sponsored or school-related activity, function or program, whether on or off school grounds, including at a school bus stop or on a school bus or other vehicle owned, leased or used by a local or regional board of education, and may include other activities, functions or programs that occur outside of a school-sponsored or school-related activity, function or program if bullying at or during such other activities, functions or programs negatively impacts the school environment.
7. **“Cyberbullying”** means any act of bullying through the use of the Internet, interactive and digital technologies, cellular mobile telephone or other mobile electronic devices or any other electronic communication.
8. **“Teen dating violence”** means any act of physical, emotional or sexual abuse, including stalking, harassing and threatening, that occurs between two students who are currently in or who have recently been in a dating relationship.
9. **“Mobile electronic device”** means any hand-held or other portable electronic equipment capable of providing data communication between two or more individuals, including, but not limited to, a text messaging device, a paging device, a personal digital assistant, a laptop computer, equipment that is capable of playing a video game or a digital video disk or equipment on which digital images are taken or transmitted.
10. **“Electronic communication”** means any transfer of signs, signals, writing, images, sounds, data or intelligence of any nature transmitted in whole or in part by a wire, radio, electromagnetic, photoelectronic or photo-optical system.
11. **“School climate improvement plan”** means a building-specific plan developed by the school climate committee, in collaboration with the school climate specialist, using school climate survey data and any other relevant information, through a process that

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engages all members of the school community and involves such members in a series of overlapping systemic improvements, school-wide instructional practices and relational practices that prevent, identify and respond to challenging behavior, including, but not limited to alleged bullying and harassment in the school environment.

12. **“Restorative practices”** means evidence and research-based system-level practices that focus on (A) building high-quality, constructive relationships among the school community, (B) holding each student accountable for any challenging behavior, and (C) ensuring each such student has a role in repairing relationships and reintegrating into the school community.
13. **“School climate survey”** means a research-based, validated and developmentally appropriate survey administered to students, school employees and families of students, in the predominant languages of the members of the school community, that measures and identifies school climate needs and tracks progress through a school climate improvement plan.
14. **“Connecticut school climate policy”** means the school climate policy developed, updated and approved by an association in the state that represents boards of education and adopted by the Social and Emotional Learning and School Climate Advisory Collaborative, established pursuant to section 10-222q of the general statutes, as amended by this act, that provides a framework for an effective and democratically informed school climate improvement process that serves to implement Connecticut school climate standards, and includes a continuous cycle of (A) planning and preparation, (B) evaluation, (C) action planning, and (D) implementation.
15. **“School employee”** means (A) a teacher, substitute teacher, administrator, school superintendent, school counselor, school psychologist, social worker, school nurse, physician, paraeducator or coach employed by a local or regional board of education, or (B) any other individual who, in the performance of his or her duties, has regular contact with students and who provides services to or on behalf of students enrolled in a public school, pursuant to a contract with a local or regional board of education.
16. **“School community”** means any individuals, groups, businesses, public institutions and nonprofit organizations that are invested in the welfare and vitality of a public school system and the community in which it is located, including, but not limited to, students and their families, members of the local or regional board of education, volunteers at a school and school employees.
17. **“Challenging behavior”** means behavior that negatively impacts school climate or interferes, or is at risk of interfering, with the learning or safety of a student or the safety of a school employee.

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18. **“Evidence Based Practices”** in education refers to instructional and school-wide improvement practices that systematic empirical research has provided evidence of statistically significant effectiveness.
19. **“Effective School Climate Improvement”** is a restorative process that engages all stakeholders in the following six essential practices:
 - A. Promoting decision-making that is collaborative and actively involves all stakeholders (e.g., school personnel, students, families, community members) with varied and meaningful roles and perspectives where all voices are heard;
 - B. Utilizing psychometrically sound quantitative (e.g., school climate survey, discipline data) and qualitative (e.g., interviews, focus groups) data to drive action planning, preventive and intervention practices and implementation strategies that continuously improve all dimensions of school climate, including regularly collecting data to evaluate progress and inform the improvement process;
 - C. Tailoring improvement goals to the unique needs of the students, educators, and broader school community. These goals shall be integrated into overall school improvement efforts thereby leveraging school strengths to address evidence-based areas of need, while sustaining the improvement process over time;
 - D. Fostering adult learning in teams and/or professional learning communities to build capacity building among school personnel and develop common staff skills to educate the whole child;
 - E. Basing curriculum, instruction, student supports, and interventions on scientific research and grounding in cognitive, social-emotional, and psychological theories of youth development. Interventions include strength-based programs and practices that together represent a comprehensive continuum of approaches to promote healthy student development and positive learning environments as well as address individual student barriers to learning and adult barriers to teaching; and
 - F. Strengthening policies and procedures related to:
 - a. climate and restorative informed teaching and learning environments;
 - b. infrastructure to facilitate data collection, analysis, and effective planning;
 - c. implementation of school climate improvement plans with the goal of becoming restorative;
 - d. evaluation of the school climate improvement process; and
 - e. sustainability of school climate and restorative improvement efforts.

School Climate Coordinator Roles and Responsibilities

For the school year commencing July 1, 2025, and each school year thereafter, the superintendent of schools for each school district, or an administrator appointed by the

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superintendent, shall serve as the school climate coordinator for the school district.

The school climate coordinator shall be responsible for:

1. providing district-level leadership and support for the implementation of the school climate improvement plan for each school;
2. collaborating with the school climate specialist, for each school to (A) develop a continuum of strategies to prevent, identify and respond to challenging behavior, including, but not limited to, alleged bullying and harassment in the school environment, and (B) communicate such strategies to the school community, including, but not limited to, through publication in the district student handbook;
3. collecting and maintaining data regarding school climate improvement, including, but not limited to, school discipline records, school climate assessments, attendance rates, social and emotional learning assessments, academic growth data, types and numbers of alleged and verified bullying complaints submitted by members of the school community, types and numbers of challenging behaviors addressed using the restorative practices response policy, and data concerning the implementation and outcome of restorative practices; and
4. meeting with the school climate specialist for each school at least twice during the school year to (A) identify strategies to improve school climate, including, but not limited to, by responding to challenging behavior and implementing evidence and research-based interventions, such as restorative practices, (B) propose recommendations for revisions to the school climate improvement plan, and (C) assist with the completion of the school climate survey.

School Climate Specialist

For the school year commencing July 1, 2025, and each school year thereafter, the principal of each school, or a school employee who holds professional certification pursuant to section 10-145 of the general statutes, is trained in school climate improvement or restorative practices and is designated as the school climate specialist by the school principal, shall serve as the school climate specialist for the school.

The school climate specialist shall be responsible for:

1. leading in the prevention, identification, and response to challenging behavior, including, but not limited to, reports of alleged bullying and harassment;
2. implementing evidence and research-based interventions, including, but not limited to, restorative practices;

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3. scheduling meetings for and leading the school climate committee; and
4. leading the implementation of the school climate improvement plan.

School Climate Committee

For the school year commencing July 1, 2025, and each school year thereafter, each school climate specialist shall appoint members to the school climate committee who are diverse, including members who are racially, culturally, and linguistically representative of various roles in the school community.

The school climate committee shall consist of:

1. the school climate specialist;
2. a teacher selected by the exclusive bargaining representative for certified employees chosen pursuant to section 10-153b of the general statutes;
3. a demographically representative group of students enrolled at the school, as developmentally appropriate;
4. families of students enrolled at the school; and
5. at least two members of the school community, as determined by the school climate specialist.

Membership of the school climate committee shall be annually reviewed and approved by the school climate specialist, in coordination with the school climate coordinator.

The school climate committee shall be responsible for:

1. assisting in the development, annual scheduling, and administration of the school climate survey, and reviewing of the school climate survey data.
2. using the school climate survey data to identify strengths and challenges to improve school climate, and to create or propose revisions to the school climate improvement plan.
3. assisting in the implementation of the school climate improvement plan and recommending any improvements or revisions to the plan.
4. advising on strategies to improve school climate and implementing evidence and research-based interventions, including, but not limited to, restorative practices, in the

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school community.

5. annually providing notice of the uniform challenging behavior and/or bullying complaint form, or similar complaint form used by the school, to the school community.

School Climate Survey

For the school year commencing July 1, 2025, and biennially thereafter, the school climate committee, for each school, shall administer a school climate survey to students, school employees and families of students, provided the parent or guardian of each student shall receive prior written notice of the content and administration of such school climate survey and shall have a reasonable opportunity to opt such student out of such school climate survey.

School Climate Improvement Plan

For the school year commencing July 1, 2025, and each school year thereafter, the school climate specialist, for each school, in collaboration with the school climate coordinator, shall develop, and update as necessary, a school climate improvement plan. Such plan shall be based on the results of the school climate survey, any recommendations from the school climate committee, including the protocols, supports, and any other data the school climate specialist and school climate coordinator deem relevant. Such plan shall be submitted to the school climate coordinator for review and approval on or before December thirty-first of each school year. Upon approval of such plan, a written or electronic copy of such plan shall be made available to members of the school community and such plan shall be used in the prevention of, identification of and response to all challenging behavior.

Additionally, districts may place the school climate improvement plans into their district and school improvement plans.

Training

For the school year commencing July 1, 2025, and each school year thereafter, each local and regional Board of Education shall provide resources and training to school employees regarding:

1. social and emotional learning;
2. school climate and culture and evidence and research-based interventions; and
3. restorative practices.

Such resources and training may be made available at each school under the jurisdiction of such board and include technical assistance in the implementation of a school climate improvement plan. Any school employee may participate in any such training offered by the board under this section. The school climate coordinator shall select, and approve, the individuals or organizations that will provide such training.

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Funding

The school district shall in its discretion allocate sufficient funding to satisfy the requirements of this policy for all schools in the district. Such funding shall be distributed accordingly, with Superintendent approval, for assessments and professional development, as well as for school community outreach, training, and technical assistance.

Accountability

The Board shall adopt and allocate adequate resources to support the Connecticut School Climate Policy and adhere to state regulations set forth in Public Act 23-167.

Connecticut School Climate Standards

1. The school district community¹ has a shared vision and plan for promoting and sustaining a positive school climate² that focuses on prevention, identification, and response to all challenging behavior³.
2. The school district community adopts policies that promote:
 - a. a sound school environment that develops and sustains academic, social, emotional, ethical, civic, and intellectual skills; and
 - b. a restorative school environment focused on overcoming barriers to teaching and learning by building and supporting meaningful school-wide relationships, and intentionally re-engaging any disengaged students, educators, and families of students in the school community.
3. The school community's practices are identified, prioritized, and supported to:
 - a. promote learning and the positive academic, social, emotional, ethical, and civic development of students;
 - b. enhance engagement in teaching, learning, and school-wide activities;
 - c. address barriers to teaching and learning; and

¹ School Community means any individuals, groups or businesses, public institutions and nonprofit organizations invested in the welfare and vitality of a public school system and the community in which it is located, including, but not limited to, students and their families, members of the local or regional board of education, volunteers at a school and school employees.

² School climate means the quality and character of the school life, with a particular focus on the quality of relationships within the school community, and which is based on patterns of people's experiences of school life, and that reflects the norms, goals, values and interpersonal relationships, teaching, learning, leadership practices and organizational structures within the school community.

³ Challenging behavior means behavior that negatively impacts school climate or interferes, or is at risk of interfering, with the learning or safety of a student or the safety of a school employee.

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- d. develop and sustain a restorative infrastructure that builds capacity, accountability, and sustainability.
4. The school community creates a school environment⁴ where *everyone* is safe, welcomed, supported, and included in all school-based activities.
5. The school community creates a restorative system that cultivates a sense of belonging through norms and activities that promote social and civic responsibility, and a dedication to cultural responsiveness, diversity, equity, and inclusion.

Legal Reference: Connecticut General Statutes

10-222d Policy on bullying behavior as amended by PA 08-160, P.A. 11-232, P.A. 14-172 and PA 18-15 and PA 19-166.

10-222g Prevention and intervention strategy re bullying and teen dating violence

10-222h Analysis of school districts' efforts re prevention of and response to bullying in schools. School climate assessment instruments

10-222i State-wide safe school climate resource network. *[Repealed, Effective 7/1/2025 State-wide safe school climate resource network]*

10-222k District safe school climate coordinator. Safe school climate specialist. Safe school climate committee (as amended by PA 21-95, Section 14)

10-222p Review of safe school climate plans by Department of Education. Approval or rejection.

PA 23-167 An Act Concerning Transparency in Education

⁴ School environment means a school-sponsored or school-related activity, function or program, whether on or off school grounds, including at a school bus stop or on a school bus or other vehicle owned, leased or used by a local or regional board of education, and may include other activities, functions or programs if bullying at or during such other activities, functions, or programs negatively impacts the school environment.

Students

Use of Cell Phones and Other Personal Electronic Devices

The United States Surgeon General issued in 2023 an Advisory on Social Media and Youth Mental Health, highlighting the concerning relationship between excessive, unrestricted social media use and increased mental health challenges in youth. Further, the Connecticut State Board of Education has recommended that, in Connecticut public schools, cell phones should not be used at all during the school day of elementary and middle school students, while cell phone use in high schools should be limited.

The Amity Regional School District (District) Board of Education (Board) recognizes the safety and educational benefits of students having cell phones and other personal electronic communication devices at school. However, due to the potential risks and negative impacts on learning and mental health, a districtwide cell phone and personal electronic device policy is implemented by the Board. This policy includes cell phones as well as other current and emerging technologies. The primary goal is to maximize uninterrupted learning time for students during the school day.

The Board considers allowing students to bring to school such devices to be a privilege and not a right. The Board authorizes the Superintendent or his/her designee to revoke this privilege if a student fails to adhere to the guidelines and/or the ARSD's Acceptable Use and student Conduct/discipline policies.

The policy is being implemented from the start of the 2025-2026 school year. This policy must be read in conjunction with Board Policy 6141.321, Acceptable Use of Computers and Technology, and any of its regulations and administrative guidelines for such use.

Definitions

“Cell Phone” means any portable, privately owned electronic device capable of wireless communication, including but not limited to voice calls, text messaging, internet access, and application use. This includes smartphones and other mobile devices that may incorporate computing capabilities, cameras, and multimedia functions.

“Personal Electronic Device” means any device, including cell phones, owned by an individual with the capability to process, store, transmit, or access information independently. This includes but is not limited to, mobile phones, smartphones, smart watches, tablets, PCs, laptops, **smart glasses**, and cameras.

Use of Cell Phones

While personal electronic devices are allowed in school, use of cell phones shall be in accordance with the following:

Middle School -- Cellular phones shall be powered off and stored in a locker or backpack during instructional time, during passing times between classes, during lunch, and at any school-sponsored events where there is a reasonable expectation of quiet attentiveness or where use of the device would cause any disruption unless there is a bona fide health or safety emergency.

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Use of Cell Phones and Other Personal Electronic Devices

High School - Cellular telephones shall be powered off during instructional time and stored in a backpack, and at any school-sponsored events where there is a reasonable expectation of quiet attentiveness or where use of the device would cause any disruption unless there is a bona fide health or safety emergency. Unless specified, phones should not be visible during class time.

Use of Personal Electronic Devices

Teachers may ~~allow~~ **permit** student use of personal electronic devices, including cell phones, for ~~appropriate~~ **explicit** educational purposes. During that time, the Board directs the Superintendent or their designee to develop conduct and curricular guidelines for the use of cell phones or personal electronic devices at the middle and high school level aimed at promoting an optimal learning environment.

Cell phones and other personal electronic devices may be used during lunch, transitions between classes, and other times students are not receiving instruction. Their use must comply with policies and regulations related to acceptable use of technology in the District.

Use of personal electronic devices that stream music will be permissible if

1. used with headphones provided the device is not used during class, and
2. is only used in locations and at times as directed by school personnel.

Care for headphones is the student's responsibility. Any inappropriate use will result in confiscation.

Students may be allowed to use personal electronic devices, including cell phones as part of an IEP, 504 plan, health plan, or any other individualized educational plan developed by the District.

Students are responsible for the safekeeping of personal devices. The District is not liable for any lost, stolen, or damaged devices. Students who choose to bring personal electronic devices to school do so at their own risk and are solely responsible for the security of their devices. The District strongly encourages students to take precautions to safeguard their personal property.

Prohibited Use of Personal Electronic Devices

The use of cell phones or other personal electronic devices in certain situations and for specific purposes, is expressly prohibited including:

- In locker rooms, restrooms, or anywhere else a person has a reasonable expectation of privacy
- To send harassing, threatening, or intimidating messages or images
- To bully another person
- To invade a person's privacy
- To take pictures of someone without their consent

Students

Use of Cell Phones and Other Personal Electronic Devices

- To make video or audio recordings of anyone while on school property, school busses, or at school-sponsored events, without the principal's permission
- To cheat or otherwise violate academic integrity
- In violation of copyright laws

Consequences of Misuse of Cell Phones and Other Personal Electronic Devices

An administrator may search a student's cell phone/smartwatch or other personal electronic device if the administrator has reasonable suspicion that a law, Board policy, regulation, or school rule has been violated. The search must be reasonable in scope. Administrators shall notify parents/guardians within one (1) school day when such reasonable search is conducted. Administrators may not search a student's cell phone/smartwatch or other personal electronic device if the student's conduct consisted only of having such device out and/or using such device at an inappropriate time in violation of Board policy or school rules. However, under such circumstances, an administrator may confiscate the device and return it to the student at a later appropriate time; return may be conditioned upon a meeting with a student's parent/guardian. If the administrator has reasonable suspicion that the search will turn up evidence of sexting (i.e. nude and/or sexually explicit pictures of children), the administrator shall contact police officials prior to conducting a search. An administrator shall hand over to the police any evidence related to the potential commission of a crime.

The use of cell phones/personal electronic devices in violation of Board policies and/or regulations or state/federal laws could result in the loss of device privileges; discipline up to and including suspension or expulsion; other appropriate measures; and referral to law enforcement officials.

Devices operated in violation of this rule policy may be confiscated and not returned until, where appropriate, a parent/guardian conference has been held. Students violating this rule may be disallowed from carrying any personal communication device following the incident unless a bona fide health emergency exists.

Parent/Guardian Support

The Board asks for parents/guardians' support in reinforcing this policy by encouraging students to keep their phones away during school and refraining from calling or texting their child(ren) during instructional periods **as it is expected that the cell phone will be powered off and stored away**. In case of an emergency, we ask that parents/guardians contact the school's main office to ensure minimal disruption to learning.

Digital Citizenship and Professional Learning

The Superintendent and/or their designee shall develop a systemic approach toward developing digital literacy and citizenship to ensure that it is comprehensive and equips all students with the skills and tools necessary to safely navigate online spaces. Staff will be provided with

Students

Use of Cell Phones and Other Personal Electronic Devices

professional learning opportunities related to supporting positive digital habits, digital citizenship, and integrating the effective use of technology in the classroom.

(cf. 5131 – Conduct and Discipline)

(cf. 6141.321 – Acceptable Use of Computers and Technology)

Legal References: Connecticut General Statutes

10-233j Student possession and use of telecommunications devices

31-48d Employees engaged in electronic monitoring required to give prior notice to employees. Exceptions. Civil Penalties

53a-182 Disorderly Conduct. Class C misdemeanor

53a-183 Harassment in the second degree: Class C misdemeanor

53a-250 Definitions Federal statutes and case law Electronic Communication Privacy Act, 28 U.S.C. §§2510 through 2520

Eisner v. Stamford Board of Education, 440 F. 2d 803 (2nd Cir 1971)

Trachtman v. Anker, 563 F. 2d 512 (2nd Cir. 1977) cert. denied, 435 U.S. 925 (1978)

Hazelwood School District v. Ruhlmeir, 484 U.S. 260, 108 S Ct 562 (1988)

Bethel School District v. Fraser, 478 US 675 (1986)

Tinker v. Des Moines Independent Community Dist., 393 US 503, (1969)

New Jersey v. T.L.O., 469 U.S. 325; 105 S. Ct. 733

Safford Unified District # 1 v. Redding, 129 S. Ct. 2633

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



Dr. Jennifer P. Byars
Superintendent of Schools

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203.392.2106

April 7, 2025

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/TUTORS: NONE

NEW HIRES-NON-CERTIFIED: NONE

NEW HIRES-COACHES:

Emily Erne – Asst. Girls Lacrosse Coach – 2025 Spring Season – Amity Regional High School

TRANSFERS: NONE

RESIGNATIONS:

Michele Bivona – Category I Administrative Assistant ~ Amity Regional High School, eff. 3/25/2025
Paul Derickson – Special Education Teacher ~ Amity Middle School-Orange, eff. 6/11/2025

RETIREMENTS:

Robert Long – Social Studies Teacher ~ Amity Regional High School, eff. 6/30/2025
Christine Healy – Special Education Teacher ~ Amity Regional High School, eff. 6/30/2025