

AMITY REGIONAL SCHOOL DISTRICT NO. 5

Bethany Orange Woodbridge
25 Newton Road, Woodbridge, Connecticut 06525

Dr. Jennifer P. Byars
Superintendent of Schools

AMITY REGIONAL BOARD OF EDUCATION REGULAR MEETING AGENDA

Monday, May 12, 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 Special Meeting – April 28, 2025 [page 4](#)
 - b. Region District #5 Annual Meeting – May 5, 2025 [page 6](#)
4. **STUDENT REPORT**
 - a. Monthly Report
5. **RECOGNITION OF CABE AWARD RECIPIENTS** [page 8](#)
6. **RECOGNITION OF NHSCA ALL-AMERICAN WRESTLER**
7. **Presentation and Discussion of First Quarter 2025 Executive Summary Review of Amity Pension Fund, Sick and Severance Account, and OPEB Trust; and Policy Review** [page 9](#)
8. **PUBLIC COMMENT**
9. **SUPERINTENDENT’S REPORT**
 - a. Superintendent Report [page 40](#)
 - b. Acknowledgement of SCASA Award Recipients [page 45](#)
10. **CORRESPONDENCE**
11. **CHAIRMAN’S REPORT**
 - a. Committee Reports
 1. **ACES**
 2. **Ad-Hoc School Start Times**
 3. **CABE**
 4. **Communications**
 5. **Curriculum**
 6. **District Health and Safety**
 7. **Diversity, Equity, and Inclusion Executive Committee**
 8. **District Technology**
 - a. Monthly Report [page 46](#)
 9. **Facilities**
 - a. Monthly Report [page 47](#)
 10. **Finance**
 - a. Discussion and Possible Action on Virtual Net Metering Program [page 48](#)
 - b. Discussion and Possible Action on Contracts over \$35,000 [page 53](#)
 - i. Renewal of Food Service Management Contract
 - ii. Workers’ Compensation Insurance and Liability, Auto & Property Insurance

PLEASE POST

PLEASE POST

- iii. Student Accident Insurance
- iv. Sanding and Snow Removal
- v. Groundskeeping

- c. Discussion and Possible Action on Tuition Rate for 2025-2026 [page 58](#)
- d. Discussion of Monthly Financial Statements [page 60](#)
- e. Director of Finance and Administration Approved Transfers Under \$3,000 [page 91](#)
- f. Discussion and Possible Action on Budget Transfers of \$3,000 or More [page 93](#)
- g. Discussion and Possible Action on Standard Year-End Transfers [page 95](#)

11. **Policy**

- a. First Reads
 - i. Policy 5145.12 Search and Seizure [page 96](#)
 - ii. Policy 5145.122 Use of Dogs to Search School Property [page 98](#)
 - iii. Policy 5145.14 On Campus Recruitment [page 100](#)
- b. Second Reads
 - i. Policy 5131.911 - Connecticut School Climate Policy [page 102](#)
 - ii. Policy 5131.81 Cell Phones and other Personal Electronic Devices [page 111](#)

12. **Personnel**

- a. Personnel Report [page 115](#)

12. **NEW BUSINESS & Announcements**

13. **ITEMS FOR THE NEXT REGULAR MEETING AGENDA – Due to Chairperson by May 30, 2025**

14. **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, April 28, 2025 6:30 pm
25 Newton Road, Woodbridge, CT
Lecture Hall

BOARD MEMBERS PRESENT

Cathy Bradley, Carla Eichler, Andrea Hubbard, Christina Levere-D’Addio, Michael McDonough, Dr. Carol Oladele, Patrick Reed, and Donna Schuster

BOARD MEMBERS ABSENT

Paul Davis, Dean Hartshorn, Dr. Karunakaran, Dana Lombardi, Donna Schlank

STUDENT BOARD MEMBERS PRESENT

Janet Fan

STAFF MEMBERS PRESENT

Dr. Jennifer Byars, Dr. Shannan Carlson, Dr. Tracy, Andre Hauser, Jill LaPlante, and Kathy Burke

1. CALL TO ORDER

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

2. PLEDGE OF ALLEGIANCE

Led by Amity Board of Education Vice Chair Patrick Reed

3. APPROVAL OF MINUTES

a. Board of Education Public Hearing – April 07, 2025

MOTION by Michael McDonough, SECOND by Carla Eichler to approve the April 07, 2025 Board of Education Public hearing minutes as submitted.

VOTES IN FAVOR, 5 (Bradley, Eichler, Hubbard, McDonough, Reed)

ABSTAIN, 3 (Levere-D’Addio, Dr. Oladele, Schuster)

MOTION CARRIES

b. Board of Education Regular Meeting – April 07, 2025

MOTION by Michael McDonough, SECOND by Christina Levere-D’Addio to approve the April 07, 2025 Board of Education Regular meeting minutes as submitted.

VOTES IN FAVOR, 8 (UNANIMOUS)

MOTION CARRIES

4. RECOGNITION OF NATIONAL MERIT SCHOLARSHIP FINALISTS

Presented by Amity Region 5 High School Mr. Andre Hauser

Short recess to allow students and families time to take pictures and to dismiss.

5. STUDENT REPORT

a. Monthly Report

Presented by Board of Education student representative Janet Fan

6. SUPERINTENDENT’S REPORT

a. Superintendent Report (*Enclosure*)

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

7. CHAIRMAN’S REPORT

8. BOARD WORK SESSSION – Strategic Action Steps 2025-2028

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

Brainwrite (5 minutes); Discussion (20 minutes); Group Share and Reflection.

9. ITEMS FOR THE NEXT REGULAR MEETING AGENDA – Due to Chairperson by April 30, 2025

10. ADJOURNMENT

Vice Chairperson Reed adjourned the meeting, without objection, at 7:57 p.m.

Respectfully submitted,

Lisa Zaleski

Lisa Zaleski

BOE Recording Secretary

AMITY REGIONAL BOARD OF EDUCATION Annual District Meeting on the Budget MINUTES

Monday, May 5, 2025, 5:30 pm

25 Newton Road, Woodbridge, CT

BOARD MEMBERS PRESENT

Paul Davis, Carla Eichler, Andrea Hubbard, Dr. Karunakaran, and Patrick Reed

BOARD MEMBERS ABSENT

Cathy Bradley, Sean Hartshorn, Dana Lombardi, Christina Levere-D'Addio, Michael McDonough, Dr. Carol Oladele, Donna Schlank and Donna Schuster

STAFF MEMBERS PRESENT

Dr. Jennifer Byars, Theresa Lumas

1. CALL TO ORDER

Chairperson Paul Davis called the meeting to order at 5:30 p.m.

Motion to nominate Paul Davis as moderator to conduct the Annual District Meeting.

Motion made by: Patrick Reed; second: Dr. Karunakaran

Motion to close nominations for moderator to conduct the Annual District meeting

Motion made by: Andrea Hubbard; second: Patrick Reed; vote tally: 5-0

Call to nominate Paul Davis as moderator to conduct the Annual District Meeting; vote tally: 5-0

Moderator read the Call of the Meeting (Legal Notice)

PURSUANT TO SECTION 10-47 OF THE CONNECTICUT GENERAL STATUTES AS AMENDED, NOTICE IS HEREBY GIVEN THAT THE ANNUAL DISTRICT MEETING WILL BE HELD AT 5:30 PM ON MONDAY, MAY 5, 2025, AT AMITY REGIONAL HIGH SCHOOL, 25 NEWTON ROAD, WOODBRIDGE, CONNECTICUT, TO PRESENT THE ANNUAL BUDGET OF REGIONAL SCHOOL DISTRICT NO. 5 FOR THE FISCAL YEAR JULY 1, 2025 TO JUNE 30, 2026. VOTING ON THE PROPOSED BUDGET SHALL BE BY REFERENDUM VOTE ON TUESDAY, MAY 6, 2025. COPIES OF THE PROPOSED BUDGET WILL BE AVAILABLE TO ANY PERSON ELIGIBLE TO VOTE AT A TOWN MEETING IN THE TOWNS OF BETHANY, ORANGE, AND WOODBRIDGE, AT THE ADMINISTRATIVE OFFICES OF THE BOARD AT AMITY REGIONAL DISTRICT OFFICES. ADDITIONAL COPIES OF THE PROPOSED BUDGET ALSO WILL BE AVAILABLE IN THE OFFICE OF THE TOWN CLERK IN EACH OF THE TOWNS OF BETHANY, ORANGE AND WOODBRIDGE.

The Board waived the presentation by Superintendent of Amity Region 5, Dr. Jennifer Byars of the Amity Region 5 2025-2026 budget since no public was present. The presentation and hard copies of the budget were available.

Moderator turned the meeting over to Board Chairman Davis who read the following:

*A referendum vote of the electors and citizens qualified to vote in a town meeting of the Towns of Bethany, Orange & Woodbridge, Connecticut will be held in the Town of Bethany, at the following polling place:
Bethany Town Hall, Peck Road, Bethany*

*And in the Town of Orange, at the following polling place:
High Plains Community Center, 525 Orange Center Road, Orange*

*And in the Town of Woodbridge, at the following polling place:
The Center (Gym) 4 Meetinghouse Lane, Woodbridge*

And simultaneously in all Towns in the District on Tuesday, May 6, 2025, between the hours of 6:00 a.m. and 8:00 p.m., pursuant to Sections 7-7 and 10-47 of the General Statutes. The following question will be placed on the ballot labels:

SHALL THE AMITY REGIONAL SCHOOLS' BUDGET FOR THE FISCAL YEAR 2025-26 IN THE GROSS AMOUNT OF \$58,108,999 AND THE NET AMOUNT OF \$56,835,803, BE APPROVED AS PRESENTED BY THE BOARD OF EDUCATION OF REGIONAL SCHOOL DISTRICT NO. 5?

Voters approving said question shall vote "YES" and those opposing said question shall vote "NO."

Motion to adjourn to a machine/ballot vote to be held in the towns of Bethany, Orange, and Woodbridge on Tuesday, May 6, 2025, from 6:00 a.m. to 8:00 p.m.

Motion made by: Carla Eichler; second: Dr. Karunakaran; vote tally: 5-0

Meeting adjourned without objection at 5:34 p.m. by Chairman Davis

Respectfully submitted,

Lisa Zaleski

Lisa Zaleski
BOE Recording Secretary



CABE

Student Leadership Award Recipients

2025

Amity Regional High School:

- Jacob Storeygard
- Viviana Pfannebecker

Amity Regional Middle School-Bethany:

- Damian Dalrymplye
- Phoebe Bartels

Amity Regional Middle School-Orange:

- Samantha Scheibel
- Emily Frazier

CRITERIA: Willingness to take on challenges, Capability to make difficult decisions, Concern for others, Ability to work with others, Willingness to commit to a project, Diplomacy, Ability to understand issues clearly, Ability to honor a commitment.



Amity Regional School District #5

Quarterly Investment Review - First Quarter 2025

This report is intended for the exclusive use of clients or prospective clients (the "recipient") of Fiducient Advisors and the information contained herein is confidential and the dissemination or distribution to any other person without the prior approval of Fiducient Advisors is strictly prohibited. Information has been obtained from sources believed to be reliable, though not independently verified. Any forecasts are hypothetical and represent future expectations and not actual return volatilities and correlations will differ from forecasts. This report does not represent a specific investment recommendation. The opinions and analysis expressed herein are based on Fiducient Advisor research and professional experience and are expressed as of the date of this report.

Please consult with your advisor, attorney and accountant, as appropriate, regarding specific advice. Past performance does not indicate future performance and there is risk of loss.



Fiducient Advisors Update

Retirement Plans

Featured Insights

- Blog: [Understanding the Loper Bright Decision: A Guide for ERISA Professionals](#)
- Blog: [The Evolution of the “Super Saver” Strategy](#)
- Webcast: [Cash Balance Plans – Your Secret Weapon](#)

Endowments & Foundations

Featured Insights

- Blog: [Navigating Private Markets: Key Considerations for Endowment and Foundation Portfolios](#)
- Blog: [Are Hedge Funds Suitable for My Nonprofit Organization’s Portfolio?](#)

The Wealth Office®

Featured Insights

- Blog: [The Power of Compounding: How Time Can Be Your Best Investment Ally](#)
- Blog: [For Love and Money: Financial Planning for Couples](#)
- Webcast: [Your 2025 Wealth Blueprint: Key Planning Considerations](#)

Research Insights

- [The Evolution of Qualified Default Investment Alternatives](#)
- [2025 First Quarter Considerations](#)
- [Monthly Market Recaps](#)
- [Monthly Market Updates](#)

Save the Date!

**2025
Investor Conference**

The Westin Copley Place | Boston
September 16 - 17

New Associates – Welcome!

Vivian Alvarado
Client Service Associate

Stephany Fryman
CRM Solutions Administrator

Nor Attisha
Compliance Officer

Dona Hounguevou
Client Service Associate

Christy Coronel
Human Resources Assistant

Sean Roopcharan
Client Service Associate

Joshua Vance
Middle Office Associate

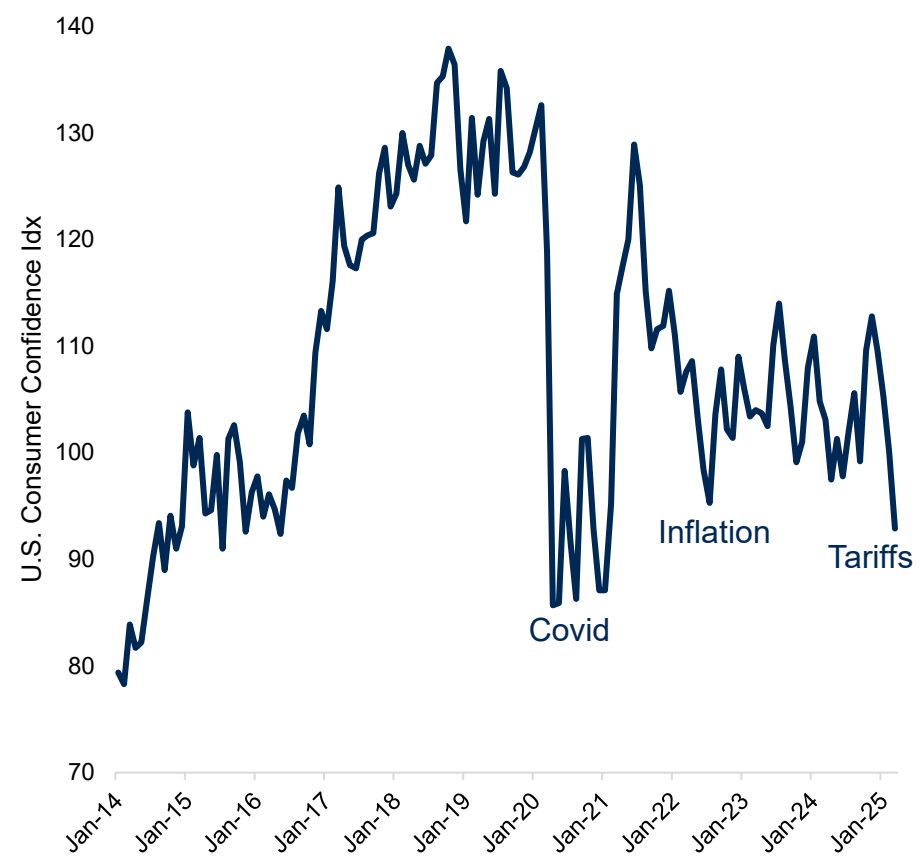
Table of Contents



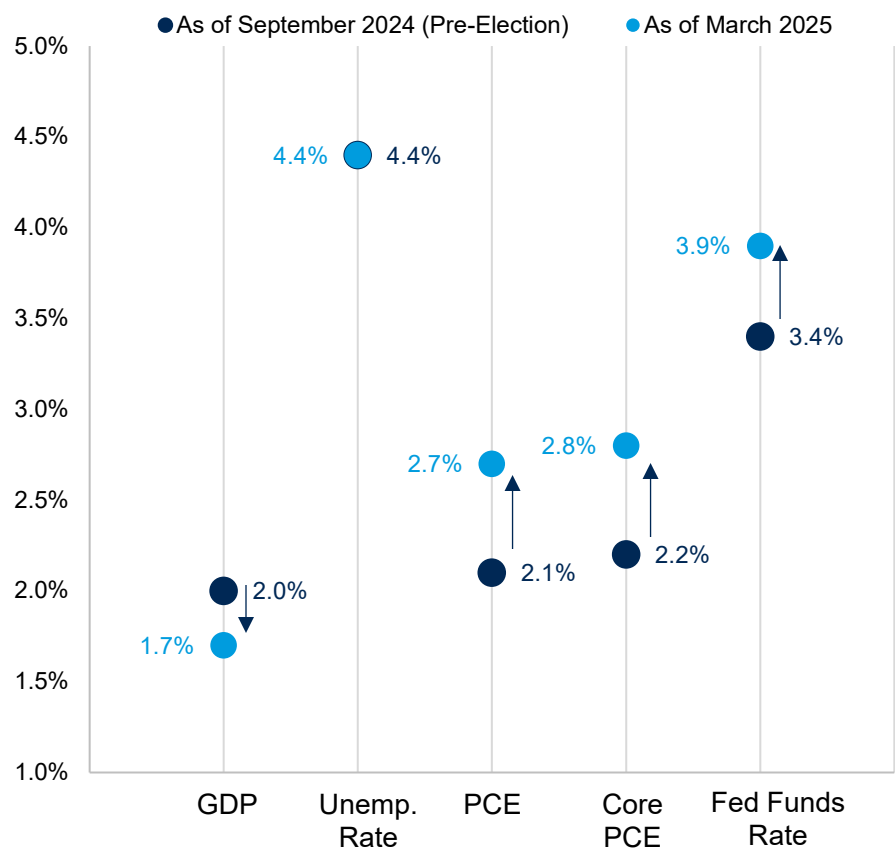
Section 1	1Q 2025 Executive Summary
Section 2	Appendix <ul style="list-style-type: none">▪ Additional Plan Information & Disclosures



Market Themes



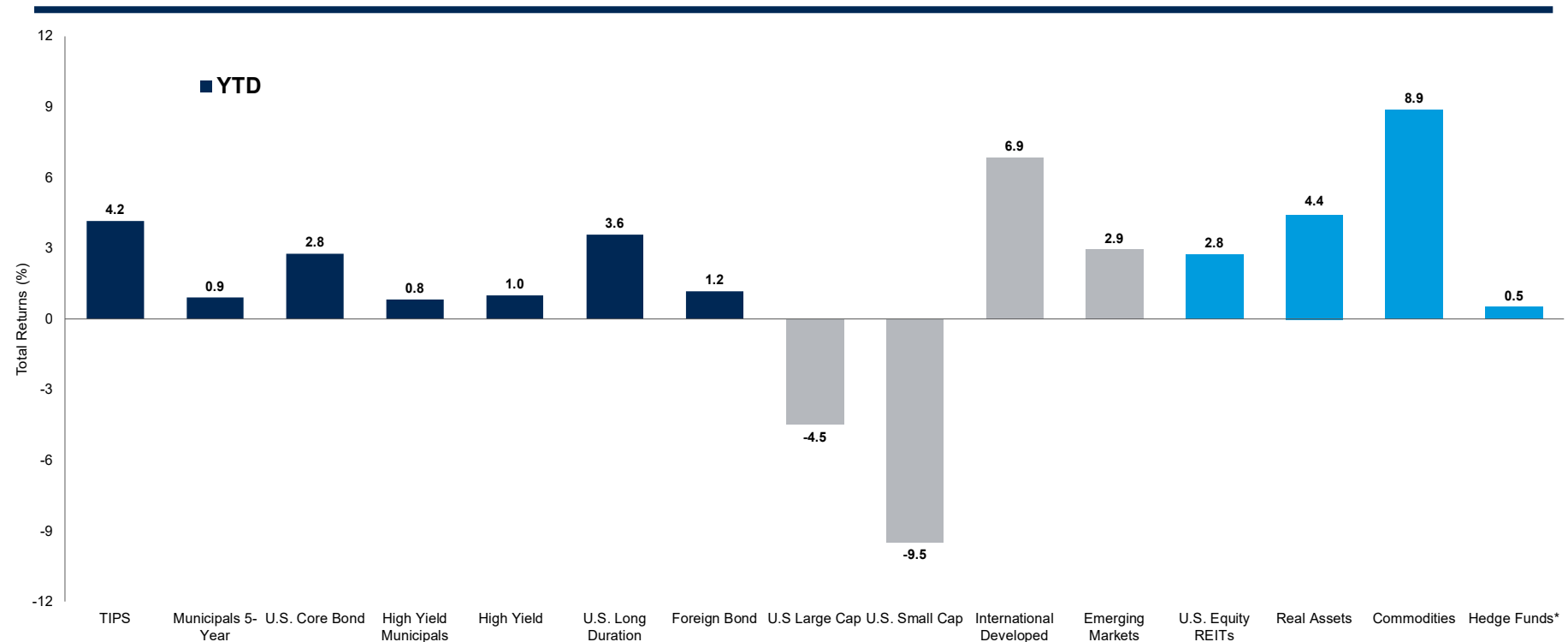
Sources: FactSet, U.S. Conference Board. As of March 31, 2025



Source: Federal Reserve. As of March 31, 2025



Asset Class Returns



Source: Morningstar Direct. As of March 31, 2025. *Hedge fund returns as of February 28, 2025.

Real Asset / Alternatives (1Q 2025)

- + REITs generated a positive return, benefitting from the declining interest rate environment. More defensive areas, such as health care and infrastructure, outperformed.
- + Real Assets had favorable results as inflation expectations moved higher in reaction to foreign policy. Infrastructure, natural resource equities and inflation linked bonds all contributed.
- + Commodities were among the strongest asset classes during the period benefiting from robust precious metal performance and strong energy returns.²¹

See disclosures for list of indices representing each asset class. Past performance does not indicate future performance and there is a possibility of a loss. Indices cannot be invested in directly.



Fiduciary Governance Calendar for Public Defined Benefit & OPEB Plans

The fiduciary governance calendar is designed to create a disciplined framework around governance, which helps ensure that over the course of a calendar year key fiduciary obligations and responsibilities are being met.



*Liquidity analysis is provided only for portfolios with marketable alternatives and/or private equity.



Investment Policy Statement

A well-written Investment Policy Statement serves as the blueprint for the management of the investment program. As such, there are certain criteria that are required in an IPS, and other criteria that may or may not be included based on the organization’s circumstances:

Important elements of an IPS to consider:	
Investment objective(s)	✓
Assignment of responsibilities	✓
Asset allocation framework	✓
Rebalancing guidelines	✓
Selection and monitoring criteria for investment strategies	✓
Termination guidelines for investment strategies	✓

In the appendix, you will find the most recent IPS on file for the Amity Regional School District #5 Plans.

- The body and asset allocation table of the IPS for the Pension and OPEB Plans is as of June 2024. While the S&S Plan’s IPS body and allocation table are as of November 2015.
- The IPS was most recently reviewed/approved by the Investment Committee in June 2024
- There are no recommendations for change at this point in time.

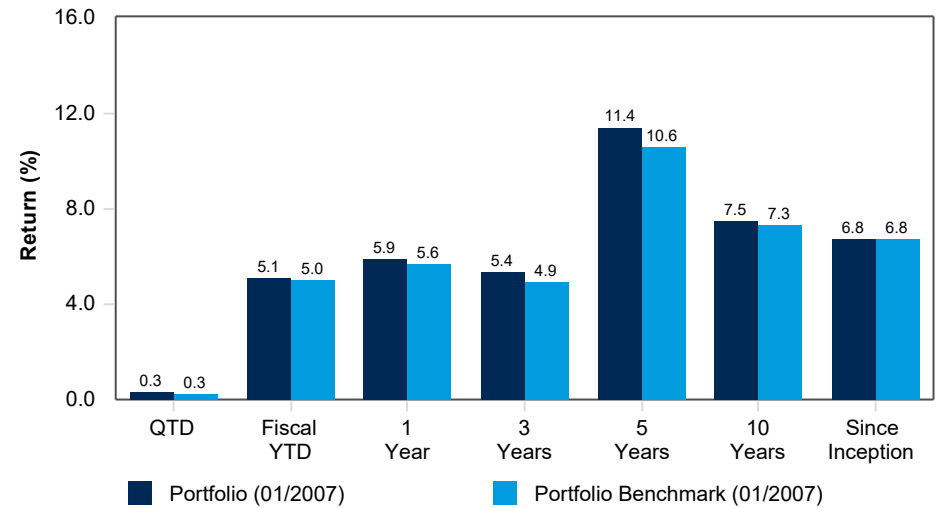


Portfolio Dashboard

Amity Pension

As of March 31, 2025

Historical Performance



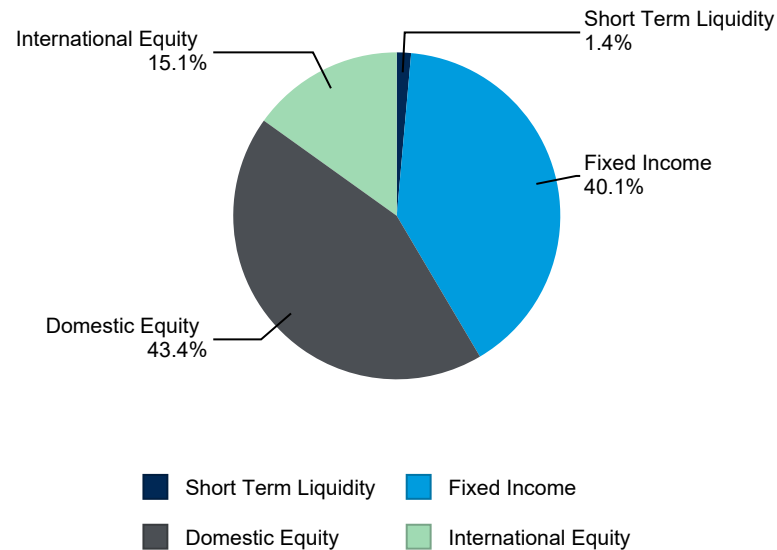
Summary of Cash Flows

	QTD	1 Year	Since Inception
Beginning Market Value	18,123,359	17,899,310	5,911,809
Net Contributions	-30,007	-775,841	-1,157,342
Gain/Loss	55,988	1,025,871	13,394,874
Ending Market Value	18,149,340	18,149,340	18,149,340

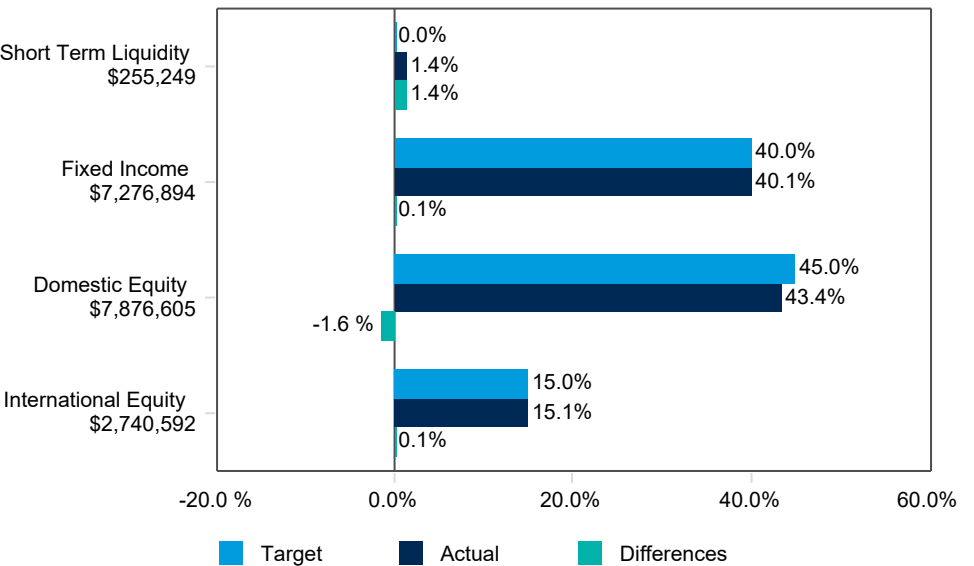
Current Benchmark Composition

From Date	To Date	
04/2024	Present	40.00% Blmbg. U.S. Aggregate, 7.50% S&P 500, 11.25% CRSP U.S. Large Cap Value TR Index, 11.25% CRSP U.S. Large Cap Growth TR Index, 9.00% CRSP U.S. Mid Cap TR Index, 6.00% CRSP U.S. Small Cap TR Index, 15.00% FTSE Developed ex US Spliced Index

Portfolio Allocation



Actual vs. Target Allocations



Client portfolio performance is presented net of underlying investment manager fees but gross of Fiducient Advisors' fees.



Asset Allocation

Amity Pension

As of March 31, 2025

	Asset Allocation (\$)	Asset Allocation (%)	Target Allocation (%)	Differences (%)
Amity Pension	18,149,340	100.0	100.0	0.0
Short Term Liquidity	255,249	1.4	0.0	1.4
All Spring Govt Money Market Fund I	255,249	1.4	0.0	1.4
Fixed Income	7,276,894	40.1	40.0	0.1
Vanguard Total Bond Market Index Adm	5,775,660	31.8	32.0	-0.2
BlackRock Strategic Income Opportunities K	1,501,233	8.3	8.0	0.3
Domestic Equity	7,876,605	43.4	45.0	-1.6
Vanguard 500 Index Adm	1,351,714	7.4	7.5	-0.1
Vanguard Value Index Adm	2,069,264	11.4	11.3	0.2
Vanguard Growth Index Adm	1,806,790	10.0	11.3	-1.3
Vanguard Mid-Cap Index Adm	1,625,883	9.0	9.0	0.0
Vanguard Small-Cap Index Adm	1,022,953	5.6	6.0	-0.4
International Equity	2,740,592	15.1	15.0	0.1
Vanguard Developed Markets Adm	2,740,592	15.1	15.0	0.1

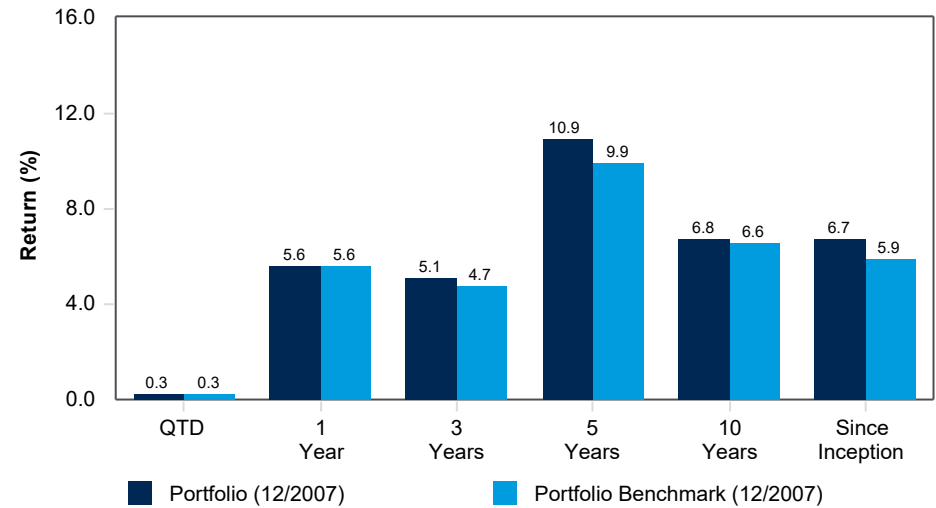


Portfolio Dashboard

Amity OPEB

As of March 31, 2025

Historical Performance



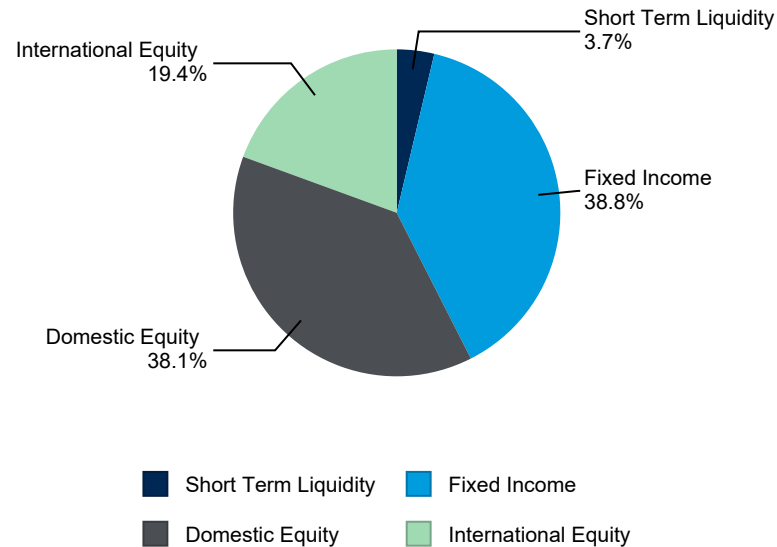
Summary of Cash Flows

	QTD	1 Year	Since Inception
Beginning Market Value	3,903,975	3,372,305	507,703
Net Contributions	-105,802	235,280	951,370
Gain/Loss	10,756	201,344	2,349,856
Ending Market Value	3,808,929	3,808,929	3,808,929

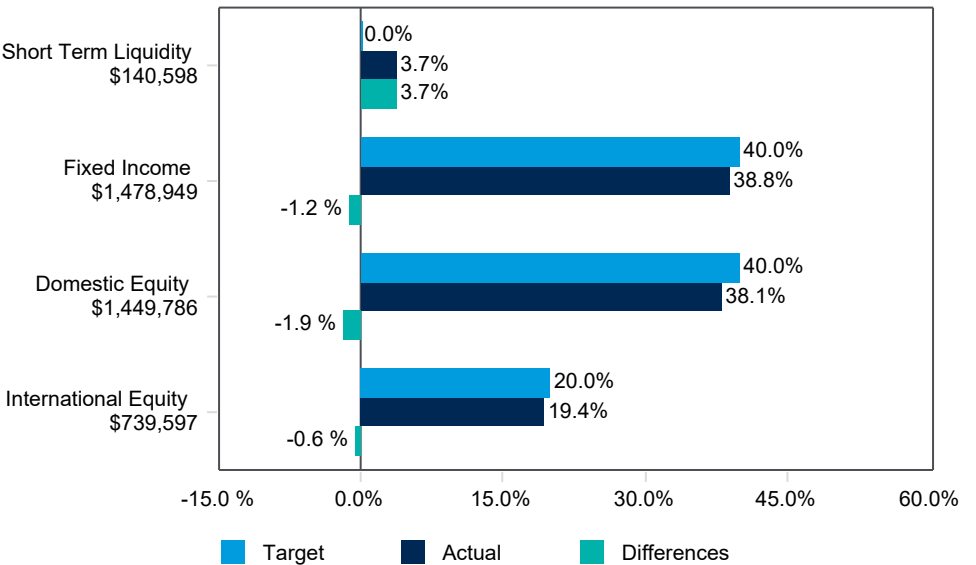
Current Benchmark Composition

From Date	To Date	
06/2023	Present	15.00% Blmbg. U.S. TIPS 0-5 Year, 25.00% Blmbg. U.S. Aggregate, 30.00% S&P 500, 10.00% CRSP U.S. Small Cap TR Index, 20.00% FTSE Developed ex US Spliced Index

Portfolio Allocation



Actual vs. Target Allocations



Client portfolio performance is presented net of underlying investment manager fees but gross of Fiducient Advisors' fees.



Asset Allocation

Amity OPEB

As of March 31, 2025

	Asset Allocation (\$)	Asset Allocation (%)	Target Allocation (%)	Differences (%)
Amity OPEB	3,808,929	100.0	100.0	0.0
Short Term Liquidity	140,598	3.7	0.0	3.7
All Spring Govt Money Market Fund I	140,598	3.7	0.0	3.7
Fixed Income	1,478,949	38.8	40.0	-1.2
Vanguard Short Term Inflation Protection Adm	568,889	14.9	15.0	-0.1
Vanguard Total Bond Market Index Adm	556,465	14.6	15.0	-0.4
BlackRock Strategic Income Opportunities K	353,595	9.3	10.0	-0.7
Domestic Equity	1,449,786	38.1	40.0	-1.9
Vanguard 500 Index Adm	1,114,911	29.3	30.0	-0.7
Vanguard Small-Cap Index Adm	334,874	8.8	10.0	-1.2
International Equity	739,597	19.4	20.0	-0.6
Vanguard Developed Markets Index Fund Adm	739,597	19.4	20.0	-0.6

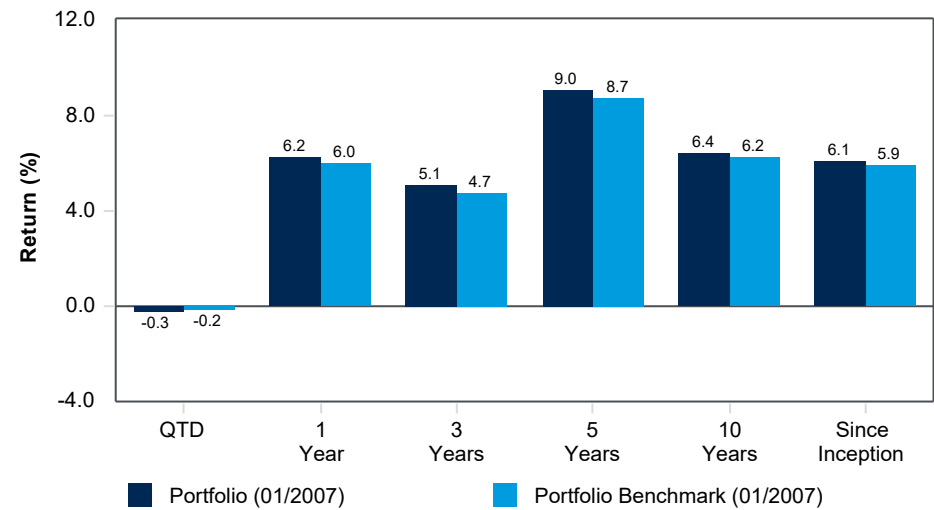


Portfolio Dashboard

Amity Sick & Severence

As of March 31, 2025

Historical Performance



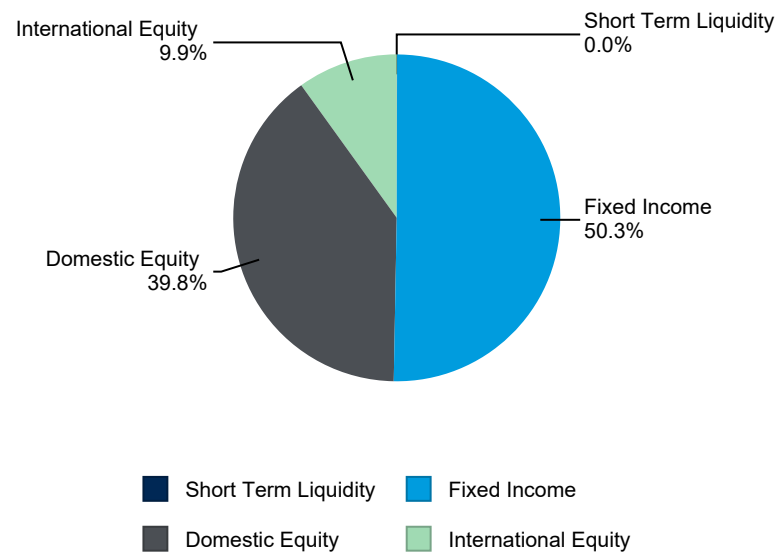
Summary of Cash Flows

	QTD	1 Year	Since Inception
Beginning Market Value	457,378	518,032	897,135
Net Contributions	-476	-88,108	-1,180,186
Gain/Loss	-1,203	25,775	738,750
Ending Market Value	455,699	455,699	455,699

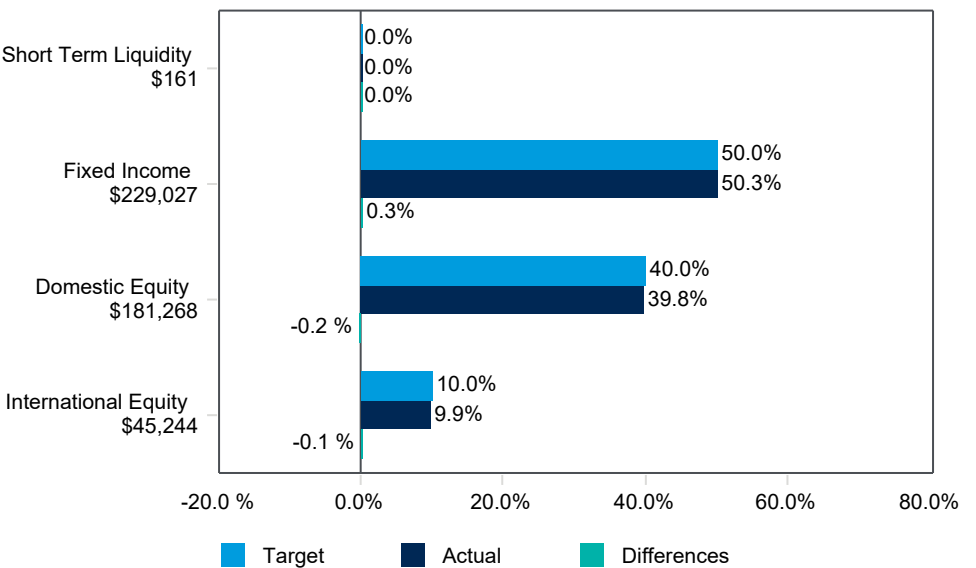
Current Benchmark Composition

From Date	To Date	
03/2014	Present	5.00% Blmbg. U.S. TIPS, 22.50% Blmbg. 1-3 Govt, 22.50% Blmbg. U.S. Aggregate, 40.00% CRSP U.S. Total Market TR Index, 10.00% FTSE Developed ex US Spliced Index

Portfolio Allocation



Actual vs. Target Allocations



Client portfolio performance is presented net of underlying investment manager fees but gross of Fiducient Advisors' fees.

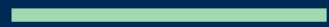


Asset Allocation

Amity Sick & Severance

As of March 31, 2025

	Asset Allocation (\$)	Asset Allocation (%)	Target Allocation (%)	Differences (%)
Amity Sick & Severance	455,699	100.0	100.0	0.0
Short Term Liquidity	161	0.0	0.0	0.0
All Spring Govt Money Market Fund I	161	0.0	0.0	0.0
Fixed Income	229,027	50.3	50.0	0.3
Vanguard Short Term Inflation Protection Adm	23,231	5.1	5.0	0.1
Vanguard Short-Term Treasury Index Fund Adm	102,892	22.6	22.5	0.1
Vanguard Total Bond Market Index Adm	102,904	22.6	22.5	0.1
Domestic Equity	181,268	39.8	40.0	-0.2
Vanguard Total Stock Market Index Adm	181,268	39.8	40.0	-0.2
International Equity	45,244	9.9	10.0	-0.1
Vanguard Developed Markets Adm	45,244	9.9	10.0	-0.1



Appendix

AMITY REGIONAL HIGH SCHOOL DISTRICT No. 5

Pension Plan

COMPOSITE INVESTMENT POLICY STATEMENT AND ASSET ALLOCATION

June 2024

INTRODUCTION & PURPOSE

The AMITY REGIONAL HIGH SCHOOL DISTRICT No. 5 PENSION Plan for non-certified employees has been established to provide retirement benefits for current and former employees. The purpose of this Investment Policy Statement is to clearly articulate the Amity Board of Education's views on the Plan's investment objectives and risk tolerance. This Statement will also establish a target asset allocation and performance benchmark that will be used to monitor performance. This statement does not constitute a contract or a statement of mandatory requirements, but is instead an explanation of the general principles established for overseeing the Plan. The Amity Board of Education will determine the weighting to be given to each of these principles and may consider factors in addition to those described in these guidelines.

ASSIGNMENT OF RESPONSIBILITIES

Board of Education - The Amity Board of Education is charged with the responsibility for the management of the assets of the Plan. The Amity Board of Education shall discharge its duties solely in the interest of Plan participants, with the care, skill, prudence and diligence under the circumstances then prevailing.

Investment Manager(s) - Each Investment Manager will have full discretion to make all investments placed under its jurisdiction, while observing and operating within all policies, guidelines, and constraints as detailed in the attached Appendix, consisting of individual manager investment policy statements or mutual fund prospectuses, as applicable. Specific responsibilities of each Investment Manager include reporting, on a timely basis, quarterly investment performance results, and informing the Amity Board of Education regarding any qualitative change to investment management organization, i.e. changes in portfolio management personnel, ownership changes, investment philosophy, etc.

Investment Consultant - The Investment Consultant's role is that of a non-discretionary advisor to the Amity Board of Education and the Plan. The Investment Consultant will assist in the development and periodic review of an Investment Policy Statement, conducting manager searches, monitoring the performance of the Investment Managers, communicating matters of policy, manager research, and manager performance.

Custodian - The Custodian shall be responsible for the safekeeping and custody of assets. The Custodian will physically (or through agreement with a sub-custodian) maintain possession of securities owned by the Plan, collect dividends and interest payments, redeem maturing securities, and effect receipt and delivery following purchases and sales. The Custodian may also perform regular accounting of all assets owned, purchased, or sold, as well as movement of assets into and out of the Plan accounts.

INVESTMENT OBJECTIVES

The objectives of the Plan have been established after a comprehensive review of current and projected financial requirements, market returns, and risks and any special requirements of the AMITY REGIONAL HIGH SCHOOL DISTRICT No. 5 PENSION Plan. The Amity Board of Education will address these objectives in periodic reviews of the Plan's performance.

The Plans have both absolute and relative investment objectives.

Absolute objectives:

- A long-term objective is to achieve growth in the principal value of assets while maintaining a level of stability and liquidity sufficient to ensure the timely payment of the plans' obligations.
- Achieve the target rate of return as defined by the actuarial rate of return, over a full market cycle, defined as approximately 5 to 7 years.

Relative Objectives

- Perform in line with the target asset mix.
- Exceed the 50th percentile return of a universe comprised of funds or managers with similar objectives and/or styles over time.

Consistent with the diversification objectives of the portfolio, the Investment Policy is based on the assumption that the volatility of the portfolios will be similar to that of the target policy.

The investment goals above are the objectives of the aggregate Plan, and are not meant to be imposed on each investment manager. Each individual investment manager shall be subject to either a specific investment policy statement for separate account mandates, or the prospectus for mutual funds. These individual investment policy statements and/or prospectus are attached in the Appendix.

ASSET ALLOCATION

The asset allocation target ranges set forth below represent a long-term view. Short-term market volatility may cause the asset mix to fall outside the targeted range. The target allocation may change should the Amity Board of Education, at its discretion, decide to change the mix of invested assets.

Target Asset Allocation Table				
Asset Class	Min. Weight	Target Weight	Max. Weight	Benchmark
Fixed Income	25%	40%	55%	Barclays Aggregate Index
Domestic Equity (Broad)	2.5%	7.5%	12.5%	S&P 500
Domestic Equity (Large Value)	6.25%	11.25%	16.25%	CRSP US LCV TR Index
Domestic Equity (Large Growth)	6.25%	11.25%	16.25%	CRSP US LCG TR Index
Domestic Equity (Mid Cap)	0%	9%	14%	CRSP US MC TR Index
Domestic Equity (Small Cap)	0%	6%	11%	CRSP US SM TR Index
International Equity	5%	15%	25%	FTSE Developed ex NA Spliced Index

The Plan's target policy benchmark shall be a weighted composite of market indices of the target allocation stated above.

Given the volatility of the capital markets, strategic adjustments in various asset classes may be required to rebalance asset allocation back to its target policy. Such adjustments should be executed so as to minimize excessive turnover and transaction costs. The Amity Board of Education will review actual asset allocation versus target asset allocation periodically to assess the need for portfolio rebalancing.

EVALUATION & REVIEW

The Amity Board of Education will review performance on a periodic basis. The goal is for each individual investment manager to outperform an appropriate benchmark index and be in the top 50% of their style specific peer group over a full market cycle. Performance review will not only include the examination of investment returns, but the risk assumed to achieve those returns. At its discretion, the Amity Board of Education may replace managers for performance or other reasons other than performance (e.g. change in management or philosophy) that, in its estimation, hinders the firms ability to meet its investment objectives.

ADOPTION

This Investment Policy Statement is made effective by the Amity Board of Education on June 10, 2024.

AMITY REGIONAL SCHOOL DISTRICT No. 5

GASB 45 – OPEB

COMPOSITE INVESTMENT POLICY STATEMENT AND ASSET ALLOCATION

June 2024

INTRODUCTION & PURPOSE

The AMITY REGIONAL SCHOOL DISTRICT NO. 5 OPEB Plan has been established to provide post-retirement benefits for those individuals eligible to receive them. The purpose of this Investment Policy Statement is to clearly articulate the Amity Board of Education's views on the Plan's investment objectives and risk tolerance. This Statement will also establish a target asset allocation and performance benchmark that will be used to monitor performance. This statement does not constitute a contract or a statement of mandatory requirements, but is instead an explanation of the general principles established for overseeing the Plan. The Amity Board of Education will determine the weighting to be given to each of these principles and may consider factors in addition to those described in these guidelines.

ASSIGNMENT OF RESPONSIBILITIES

Board of Education - The Amity Board of Education is charged with the responsibility for the management of the assets of the Plan. The Amity Board of Education shall discharge its duties solely in the interest of Plan participants, with the care, skill, prudence and diligence under the circumstances then prevailing.

Investment Manager(s) - Each Investment Manager will have full discretion to make all investments placed under its jurisdiction, while observing and operating within all policies, guidelines, and constraints as detailed in the attached Appendix, consisting of individual manager investment policy statements or mutual fund prospectuses, as applicable. Specific responsibilities of each Investment Manager include reporting, on a timely basis, quarterly investment performance results, and informing the Amity Board of Education regarding any qualitative change to investment management organization, i.e. changes in portfolio management personnel, ownership changes, investment philosophy, etc.

Investment Consultant - The Investment Consultant's role is that of a non-discretionary advisor to the Amity Board of Education and the Plan. The Investment Consultant will assist in the development and periodic review of an Investment Policy Statement, conducting manager searches, monitoring the performance of the Investment Managers, communicating matters of policy, manager research, and manager performance.

Custodian - The Custodian shall be responsible for the safekeeping and custody of assets. The Custodian will physically (or through agreement with a sub-custodian) maintain possession of securities owned by the Plan, collect dividends and interest payments, redeem maturing securities, and effect receipt and delivery following purchases and sales. The Custodian may also perform regular accounting of all assets owned, purchased, or sold, as well as movement of assets into and out of the Plan accounts.

INVESTMENT OBJECTIVES

The objectives of the Plan have been established after a comprehensive review of current and projected financial requirements, market returns, and risks and any special requirements of the AMITY REGIONAL SCHOOL DISTRICT NO. 5 OPEB Plan. The Amity Board of Education will address these objectives in periodic reviews of the Plan's performance.

The Plans have both absolute and relative investment objectives.

Absolute objectives:

- A long-term objective is to achieve growth in the principal value of assets while maintaining a level of stability and liquidity sufficient to ensure the timely payment of the plans' obligations.
- Achieve the target rate of return as defined by the actuarial rate of return, over a full market cycle, defined as approximately 5 to 7 years.

Relative Objectives

- Perform in line with the target asset mix.
- Exceed the 50th percentile return of a universe comprised of funds or managers with similar objectives and/or styles over time.

Consistent with the diversification objectives of the portfolio, the Investment Policy is based on the assumption that the volatility of the portfolios will be similar to that of the target policy.

The investment goals above are the objectives of the aggregate Plan, and are not meant to be imposed on each investment manager. Each individual investment manager shall be subject to either a specific investment policy statement for separate account mandates, or the prospectus for mutual funds. These individual investment policy statements and/or prospectus are attached in the Appendix.

ASSET ALLOCATION

The asset allocation target ranges set forth below represent a long-term view. Short-term market volatility may cause the asset mix to fall outside the targeted range. The target allocation may change should the Amity Board of Education, at its discretion, decide to change the mix of invested assets.

Target Asset Allocation Table				
Asset Class	Min. Weight	Target Weight	Max. Weight	Benchmark
Fixed Income	15.0%	25.0	35.0%	Barclays Aggregate Index
Inflation Protection Fixed Income	0%	15.0%	25.0%	Barclays US Treasury US 0-5 YR TIPS Index
Domestic Equity Large	30%	30%	60%	S&P 500
Domestic Equity Small	0%	10%	20%	CRSP US Small Cap TR Index
International Equity	5%	20%	40%	FTSE Developed ex NA Spliced Index

The Plan's target policy benchmark shall be a weighted composite of market indices of the target allocation stated above.

Given the volatility of the capital markets, strategic adjustments in various asset classes may be required to rebalance asset allocation back to its target policy. Such adjustments should be executed so as to minimize excessive turnover and transaction costs. The Amity Board of Education will review actual asset allocation versus target asset allocation periodically to assess the need for portfolio rebalancing.

EVALUATION & REVIEW

The Amity Board of Education will review performance on a periodic basis. The goal is for each individual investment manager to outperform an appropriate benchmark index and be in the top 50% of their style specific peer group over a full market cycle. Performance review will not only include the examination of investment returns, but the risk assumed to achieve those returns. At its discretion, the Amity Board of Education may replace managers for performance or other reasons other than performance (e.g. change in management or philosophy) that, in its estimation, hinders the firms ability to meet its investment objectives.

ADOPTION

This Investment Policy Statement is made effective by the Amity Board of Education on June 10, 2024.

**AMITY REGIONAL SCHOOL DISTRICT No. 5
SICK & SEVERANCE**

COMPOSITE INVESTMENT POLICY STATEMENT AND ASSET ALLOCATION

November 10, 2015

INTRODUCTION & PURPOSE

The AMITY REGIONAL SCHOOL DISTRICT NO. 5 SICK & SEVERANCE Plan has been established to provide retirement benefits for current and former employees. The purpose of this Investment Policy Statement is to clearly articulate the Amity Board of Education's views on the Plan's investment objectives and risk tolerance. This Statement will also establish a target asset allocation and performance benchmark that will be used to monitor performance. This statement does not constitute a contract or a statement of mandatory requirements, but is instead an explanation of the general principles established for overseeing the Plan. The Amity Board of Education will determine the weighting to be given to each of these principles and may consider factors in addition to those described in these guidelines.

ASSIGNMENT OF RESPONSIBILITIES

Board of Education - The Amity Board of Education is charged with the responsibility for the management of the assets of the Plan. The Amity Board of Education shall discharge its duties solely in the interest of Plan participants, with the care, skill, prudence and diligence under the circumstances then prevailing.

Investment Manager(s) - Each Investment Manager will have full discretion to make all investments placed under its jurisdiction, while observing and operating within all policies, guidelines, and constraints as detailed in the attached Appendix, consisting of individual manager investment policy statements or mutual fund prospectuses, as applicable. Specific responsibilities of each Investment Manager include reporting, on a timely basis, quarterly investment performance results, and informing the Amity Board of Education regarding any qualitative change to investment management organization, i.e. changes in portfolio management personnel, ownership changes, investment philosophy, etc.

Investment Consultant - The Investment Consultant's role is that of a non-discretionary advisor to the Amity Board of Education and the Plan. The Investment Consultant will assist in the development and periodic review of an Investment Policy Statement, conducting manager searches, monitoring the performance of the Investment Managers, communicating matters of policy, manager research, and manager performance.

Custodian - The Custodian shall be responsible for the safekeeping and custody of assets. The Custodian will physically (or through agreement with a sub-custodian) maintain possession of securities owned by the Plan, collect dividends and interest payments, redeem maturing securities, and effect receipt and delivery following purchases and sales. The Custodian may also perform regular accounting of all assets owned, purchased, or sold, as well as movement of assets into and out of the Plan accounts.

INVESTMENT OBJECTIVES

The objectives of the Plan have been established after a comprehensive review of current and projected financial requirements, market returns, and risks and any special requirements of the AMITY REGIONAL SCHOOL DISTRICT NO. 5 SICK & SEVERANCE Plan. The Amity Board of Education will address these objectives in periodic reviews of the Plan's performance.

The Plans have both absolute and relative investment objectives.

Absolute objectives:

- A long-term objective is to achieve growth in the principal value of assets while maintaining a level of stability and liquidity sufficient to ensure the timely payment of the plans' obligations.
- Achieve the target rate of return as defined by the actuarial rate of return, over a full market cycle, defined as approximately 5 to 7 years.

Relative Objectives

- Perform in line with the target asset mix.
- Exceed the 50th percentile return of a universe comprised of funds or managers with similar objectives and/or styles over time.

Consistent with the diversification objectives of the portfolio, the Investment Policy is based on the assumption that the volatility of the portfolios will be similar to that of the target policy.

The investment goals above are the objectives of the aggregate Plan, and are not meant to be imposed on each investment manager. Each individual investment manager shall be subject to either a specific investment policy statement for separate account mandates, or the prospectus for mutual funds. These individual investment policy statements and/or prospectus are attached in the Appendix.

ASSET ALLOCATION

The asset allocation target ranges set forth below represent a long-term view. Short-term market volatility may cause the asset mix to fall outside the targeted range. The target allocation may change should the Amity Board of Education, at its discretion, decide to change the mix of invested assets.

Target Asset Allocation Table				
Asset Class	Min. Weight	Target Weight	Max. Weight	Benchmark
Inflation Protection Fixed Income	0%	5%	10%	Barclays US Treasury US TIPS Index
Short-Term Gov't Bond Fixed Income	10%	22.5%	30%	Barclays 1-3 Govt Barclays Aggregate Index
Domestic Equity	30%	40%	60%	CRSP US Total Market TR Index
International Equity	5%	10%	40%	FTSE Developed ex NA Spliced Index

The Plan's target policy benchmark shall be a weighted composite of market indices of the target allocation stated above.

Given the volatility of the capital markets, strategic adjustments in various asset classes may be required to rebalance asset allocation back to its target policy. Such adjustments should be executed so as to minimize excessive turnover and transaction costs. The Amity Board of Education will review actual asset allocation versus target asset allocation periodically to assess the need for portfolio rebalancing.

EVALUATION & REVIEW

The Amity Board of Education will review performance on a periodic basis. The goal is for each individual investment manager to outperform an appropriate benchmark index and be in the top 50% of their style specific peer group over a full market cycle. Performance review will not only include the examination of investment returns, but the risk assumed to achieve those returns. At its discretion, the Amity Board of Education may replace managers for performance or other reasons other than performance (e.g. change in management or philosophy) that, in its estimation, hinders the firms ability to meet its investment objectives.

ADOPTION

This Investment Policy Statement is made effective by the Amity Board of Education on November 10, 2015.

Definitions & Disclosures

Please note: Due to rounding methodologies of various data providers, certain returns in this report might differ slightly when compared to other sources

REGULATORY DISCLOSURES

Offer of ADV Part 2A: Rule 204-3 under the Investment Advisers Act of 1940 requires that we make an annual offer to clients to send them, without charge, a written disclosure statement meeting the requirements of such rule. We will be glad to send a copy of our ADV Part 2A to you upon your written request to compliance@fiducient.com.

INDEX DEFINITIONS

- **Citigroup 3 Month T-Bill** measures monthly return equivalents of yield averages that are not marked to market. The Three-Month Treasury Bill Indexes consist of the last three three-month Treasury bill issues.
- **Ryan 3 Yr. GIC** is an arithmetic mean of market rates of \$1 million Guaranteed Interest Contracts held for three years.
- **Bloomberg Treasury U.S. T-Bills-1-3 Month Index** includes aged U.S. Treasury bills, notes and bonds with a remaining maturity from 1 up to (but not including) 3 months. It excludes zero coupon strips.
- **Bloomberg Capital US Treasury Inflation Protected Securities Index** consists of Inflation-Protection securities issued by the U.S. Treasury.
- **Bloomberg Muni Index** is a rules-based, market-value-weighted index engineered for the long-term tax-exempt bond market. Bonds must be rated investment-grade by at least two ratings agencies.
- **Bloomberg Muni 1 Year Index** is the 1-year (1-2) component of the Municipal Bond index.
- **Bloomberg Muni 3 Year Index** is the 3-year (2-4) component of the Municipal Bond index.
- **Bloomberg Muni 5 Year Index** is the 5-year (4-6) component of the Municipal Bond index.
- **Bloomberg Muni 7 Year Index** is the 7-year (6-8) component of the Municipal Bond index.
- **Bloomberg Intermediate U.S. Gov't/Credit** is the Intermediate component of the U.S. Government/Credit index, which includes securities in the Government and Credit Indices. The Government Index includes treasuries and agencies, while the credit index includes publicly issued U.S. corporate and foreign debentures and secured notes that meet specified maturity, liquidity, and quality requirements.
- **Bloomberg U.S. Aggregate Index** covers the U.S. investment grade fixed rate bond market, with index components for government and corporate securities, mortgage pass-through securities, and asset-backed securities.
- **Bloomberg Global Aggregate ex. USD Indices** represent a broad-based measure of the global investment-grade fixed income markets. The two major components of this index are the Pan-European Aggregate and the Asian-Pacific Aggregate Indices. The index also includes Eurodollar and Euro-Yen corporate bonds and Canadian government, agency and corporate securities.
- **Bloomberg U.S. Corporate High Yield Index** covers the universe of fixed rate, non-investment grade debt. Eurobonds and debt issues from countries designated as emerging markets (sovereign rating of Baa1/BBB+/BBB+ and below using the middle of Moody's, S&P, and Fitch) are excluded, but Canadian and global bonds (SEC registered) of issuers in non-EMG countries are included.
- **JP Morgan Government Bond Index-Emerging Market (GBI-EM) Index** is a comprehensive, global local emerging markets index, and consists of regularly traded, liquid fixed-rate, domestic currency government bonds to which international investors can gain exposure.
- **The S&P 500** is a capitalization-weighted index of 500 stocks designed to measure performance of the broad domestic economy through changes in the aggregate market value of 500 stocks representing all major industries.
- **The Dow Jones Industrial Index** is a price-weighted average of 30 blue-chip stocks that are generally the leaders in their industry.
- **The NASDAQ** is a broad-based capitalization-weighted index of stocks in all three NASDAQ tiers: Global Select, Global Market and Capital Market.
- **Russell 3000** is a market-cap-weighted index which consists of roughly 3,000 of the largest companies in the U.S. as determined by market capitalization. It represents nearly 98% of the investable U.S. equity market.
- **Russell 1000** consists of the largest 1000 companies in the Russell 3000 Index.
- **Russell 1000 Growth** measures the performance of those Russell 1000 companies with higher P/B ratios and higher forecasted growth values.
- **Russell 1000 Value** measures the performance of those Russell 1000 companies with lower P/B ratios and lower forecasted growth values.
- **Russell Mid Cap** measures the performance of the 800 smallest companies in the Russell 1000 Index.
- **Russell Mid Cap Growth** measures the performance of those Russell Mid Cap companies with higher P/B ratios and higher forecasted growth values.
- **Russell Mid Cap Value** measures the performance of those Russell Mid Cap companies with lower P/B ratios and lower forecasted growth values.
- **Russell 2000** consists of the 2,000 smallest U.S. companies in the Russell 3000 index.
- **Russell 2000 Growth** measures the performance of the Russell 2000 companies with higher P/B ratios and higher forecasted growth values.
- **Russell 2000 Value** measures the performance of those Russell 2000 companies with lower P/B ratios and lower forecasted growth values.
- **Russell 2500** consists of the 2,500 smallest U.S. companies in the Russell 3000 index.
- **Russell 2500 Growth** measures the performance of the Russell 2500 companies with higher P/B ratios and higher forecasted growth values.
- **Russell 2500 Value** measures the performance of those Russell 2500 companies with lower P/B ratios and lower forecasted growth values.
- **MSCI World** captures large and mid-cap representation across 23 Developed Markets countries. With 1,645 constituents, the index covers approximately 85% of the free float-adjusted market capitalization in each country.
- **MSCI ACWI (All Country World Index) ex. U.S. Index** captures large and mid-cap representation across 22 of 23 Developed Markets countries (excluding the United States) and 23 Emerging Markets countries. With 1,859 constituents, the index covers approximately 85% of the global equity opportunity set outside the US.
- **MSCI ACWI (All Country World Index) ex. U.S. Small Cap Index** captures small cap representation across 22 of 23 Developed Markets countries (excluding the US) and 23 Emerging Markets countries. With 4,368 constituents, the index covers approximately 14% of the global equity opportunity set outside the US.
- **MSCI EAFE** is an equity index which captures large and mid-cap representation across Developed Markets countries around the world, excluding the US and Canada. With 930 constituents, the index covers approximately 85% of the free float-adjusted market capitalization in each country.

- **MSCI EAFE Value** captures large and mid-cap securities exhibiting overall value style characteristics across Developed Markets countries around the world, excluding the US and Canada. The value investment style characteristics for index construction are defined using three variables: book value to price, 12-month forward earnings to price and dividend yield. With 507 constituents, the index targets 50% coverage of the free float-adjusted market capitalization of the MSCI EAFE Index.
- **MSCI EAFE Growth** captures large and mid-cap securities exhibiting overall growth style characteristics across Developed Markets countries around the world, excluding the US and Canada. The growth investment style characteristics for index construction are defined using five variables: long-term forward EPS growth rate, short-term forward EPS growth rate, current internal growth rate and long-term historical EPS growth trend and long-term historical sales per share growth trend. With 542 constituents, the index targets 50% coverage of the free float-adjusted market capitalization of the MSCI EAFE Index.
- **MSCI Emerging Markets** captures large and mid-cap representation across 23 Emerging Markets countries. With 836 constituents, the index covers approximately 85% of the free-float adjusted market capitalization in each country.
- **Consumer Price Index** is a measure of prices paid by consumers for a market basket of consumer goods and services. The yearly (or monthly) growth rates represent the inflation rate.
- **FTSE NAREIT Equity REITs Index** contains all Equity REITs not designed as Timber REITs or Infrastructure REITs.
- **S&P Developed World Property** defines and measures the investable universe of publicly traded property companies domiciled in developed markets. The companies in the index are engaged in real estate related activities, such as property ownership, management, development, rental and investment.
- **S&P Developed World Property x U.S.** defines and measures the investable universe of publicly traded property companies domiciled in developed countries outside of the U.S. The companies included are engaged in real estate related activities, such as property ownership, management, development, rental and investment.
- **Fund Specific Broad Real Asset Benchmarks:**
 - **DWS Real Assets:** 30%: Dow Jones Brookfield Infrastructure Index, 30%: FTSE EPRA/NAREIT Developed Index, 15%: Bloomberg Commodity Index, 15%: S&P Global Natural Resources Index, 10%: U.S. Treasury Inflation Notes Total Return Index
 - **PIMCO Inflation Response Multi Asset Fund:** 45% Bloomberg U.S. TIPS, 20% Bloomberg Commodity Index, 15% JP Morgan Emerging Local Markets Plus, 10% Dow Jones Select REIT, 10% Bloomberg Gold Subindex Total Return
 - **Principal Diversified Real Assets:** 35% BbgBarc U.S. Treasury TIPS Index, 20% S&P Global Infrastructure Index NTR, 20% S&P Global Natural Resources Index NTR, 15% Bloomberg Commodity Index, and 10% FTSE EPRA/NAREIT Developed Index NTR
 - **Wellington Diversified Inflation H:** 50% MSCI ACWI Commodity Producers Index, 25% Bloomberg Commodity Index, and 25% Bloomberg Bloomberg US TIPS 1 – 10 Year Index
- **Bloomberg Commodity Index** is calculated on an excess return basis and reflects commodity futures price movements. The index rebalances annually weighted 2/3 by trading volume and 1/3 by world production and weight-caps are applied at the commodity, sector and group level for diversification.
- **HFRI Fund Weighted Composite Index** is a global, equal-weighted index of over 2,000 single-manager funds that report to HFR Database. Constituent funds report monthly net of all fees performance in US Dollar and have a minimum of \$50 Million under management or a twelve (12) month track record of active performance. The HFRI Fund Weighted Composite Index does not include Funds of Hedge Funds.
- **The Alerian MLP Index** is the leading gauge of energy Master Limited Partnerships (MLPs). The float adjusted, capitalization-weighted index, whose constituents represent approximately 85% of total float-adjusted market capitalization, is disseminated real-time on a price-return basis (AMZ) and on a total-return basis.
- **The Adjusted Alerian MLP Index** is commensurate with 65% of the monthly returns of the Alerian MLP Index to incorporate the effect of deferred tax liabilities incurred by MLP entities.
- **Cambridge Associates U.S. Private Equity Index** is based on data compiled from more than 1,200 institutional-quality buyout, growth equity, private equity energy, and mezzanine funds formed between 1986 and 2015.
- **Cambridge Associates U.S. Venture Capital Index** is based on data compiled from over 1,600 institutional-quality venture capital funds formed between 1986 and 2015.
- **Vanguard Spliced Bloomberg US1-5Yr Gov/Cr Flt Adj Index:** Bloomberg U.S. 1–5 Year Government/Credit Bond Index through December 31, 2009; Bloomberg U.S. 1–5 Year Government/Credit Float Adjusted Index thereafter.
- **Vanguard Spliced Bloomberg US5-10Yr Gov/Cr Flt Adj Index:** Bloomberg U.S. 5–10 Year Government/Credit Bond Index through December 31, 2009; Bloomberg U.S. 5–10 Year Government/Credit Float Adjusted Index thereafter.
- **Vanguard Spliced Bloomberg US Agg Flt Adj Index:** Bloomberg U.S. Aggregate Bond Index through December 31, 2009; Bloomberg U.S. Aggregate Float Adjusted Index thereafter.
- **Vanguard Spliced Bloomberg US Long Gov/Cr Flt Adj Index:** Bloomberg U.S. Long Government/Credit Bond Index through December 31, 2009; Bloomberg U.S. Long Government/Credit Float Adjusted Index thereafter.
- **Vanguard Balanced Composite Index:** Made up of two unmanaged benchmarks, weighted 60% Dow Jones U.S. Total Stock Market Index (formerly the Dow Jones Wilshire 5000 Index) and 40% Bloomberg U.S. Aggregate Bond Index through May 31, 2005; 60% MSCI US Broad Market Index and 40% Bloomberg U.S. Aggregate Bond Index through December 31, 2009; 60% MSCI US Broad Market Index and 40% Bloomberg U.S. Aggregate Float Adjusted Index through January 14, 2013; and 60% CRSP US Total Market Index and 40% Bloomberg U.S. Aggregate Float Adjusted Index thereafter.
- **Vanguard Spliced Intermediate-Term Tax-Exempt Index:** Bloomberg 1–15 Year Municipal Bond Index.
- **Vanguard Spliced Extended Market Index:** Dow Jones Wilshire 4500 Index through June 17, 2005; S&P Transitional Completion Index through September 16, 2005; S&P Completion Index thereafter.
- **Vanguard Spliced Value Index:** S&P 500 Value Index (formerly the S&P 500/Barra Value Index) through May 16, 2003; MSCI US Prime Market Value Index through April 16, 2013; CRSP US Large Cap Value Index thereafter.
- **Vanguard Spliced Large Cap Index:** Consists of MSCI US Prime Market 750 Index through January 30, 2013, and the CRSP US Large Cap Index thereafter.
- **Vanguard Spliced Growth Index:** S&P 500 Growth Index (formerly the S&P 500/Barra Growth Index) through May 16, 2003; MSCI US Prime Market Growth Index through April 16, 2013; CRSP US Large Cap Growth Index thereafter.
- **Vanguard Spliced Mid Cap Value Index:** MSCI US Mid Cap Value Index through April 16, 2013; CRSP US Mid Cap Value Index thereafter.
- **Vanguard Spliced Mid Cap Index:** S&P MidCap 400 Index through May 16, 2003; the MSCI US Mid Cap 450 Index through January 30, 2013; and the CRSP US Mid Cap Index thereafter.
- **Vanguard Spliced Mid Cap Growth Index:** MSCI US Mid Cap Growth Index through April 16, 2013; CRSP US Mid Cap Growth Index thereafter.
- **Vanguard Spliced Total Stock Market Index:** Dow Jones U.S. Total Stock Market Index (formerly known as the Dow Jones Wilshire 5000 Index) through April 22, 2005; MSCI US Broad Market Index through June 2, 2013; and CRSP US Total Market Index thereafter.
- **Vanguard Spliced Small Cap Value Index:** SmallCap 600 Value Index (formerly the S&P SmallCap 600/Barra Value Index) through May 16, 2003; MSCI US Small Cap Value Index through April 16, 2013; CRSP US Small Cap Value Index thereafter.

- **Vanguard Spliced Small Cap Index:** Russell 2000 Index through May 16, 2003; the MSCI US Small Cap 1750 Index through January 30, 2013; and the CRSP US Small Cap Index thereafter.
- **Vanguard Spliced Small Cap Growth Index:** S&P SmallCap 600 Growth Index (formerly the S&P SmallCap 600/Barra Value Index) through May 16, 2003; MSCI US Small Cap Growth Index through April 16, 2013; CRSP US Small Cap Growth Index thereafter.
- **Vanguard Spliced Total International Stock Index:** Consists of the Total International Composite Index through August 31, 2006; the MSCI EAFE + Emerging Markets Index through December 15, 2010; the MSCI ACWI ex USA IMI Index through June 2, 2013; and FTSE Global All Cap ex US Index thereafter. Benchmark returns are adjusted for withholding taxes.
- **Vanguard Spliced Developed Markets Index:** MSCI EAFE Index through May 28, 2013; FTSE Developed ex North America Index through December 20, 2015; FTSE Developed All Cap ex US Transition Index through May 31, 2016; FTSE Developed All Cap ex US Index thereafter. Benchmark returns are adjusted for withholding taxes.
- **Vanguard Spliced Emerging Markets Index:** Select Emerging Markets Index through August 23, 2006; MSCI Emerging Markets Index through January 9, 2013; FTSE Emerging Transition Index through June 27, 2013; FTSE Emerging Index through November 1, 2015; and FTSE Emerging Markets All Cap China A Transition Index thereafter. Benchmark returns are adjusted for withholding taxes.
- **Vanguard REIT Spliced Index:** MSCI US REIT Index adjusted to include a 2% cash position (Lipper Money Market Average) through April 30, 2009; MSCI US REIT Index through January 31, 2018; MSCI US Investable Market Real Estate 25/50 Transition Index through July 24, 2018; MSCI US Investable Market Real Estate 25/50 Index thereafter.

Additional:

- Equity sector returns are calculated by Russell and MSCI for domestic and international markets, respectively. MSCI sector definitions correspond to the MSCI GICS® classification (Global Industry Classification System); Russell uses its own sector and industry classifications.
- MSCI country returns are calculated by MSCI and are free float-adjusted market capitalization indices that are designed to measure equity market performance in each specific country.
- Currency returns are calculated using Bloomberg's historical spot rate indices and are calculated using the U.S. dollar as the base currency.
- The Index of Leading Economic Indicators, calculated by The Conference Board, is used as a barometer of economic activity over a range of three to six months. The index is used to determine the direction and stability of the economy. The composite index of leading indicators, which is derived from 10 leading indicators, helps to signal turning points in the economy and forecast economic cycles. The leading indicators are the following: average weekly hours, average weekly initial claims, manufacturers' new orders, both consumer and non-defense capital goods, vendor performance, building permits, stock prices, money supply (M2), the interest rate spread and the index of consumer expectations.
- S&P Target Date Indexes are constructed using a survey method of current target date investments with \$100 million or more in assets under management. Allocations for each vintage are comprised of exchange-traded funds that represent respective asset classes used in target date portfolios. The indexes are designed to represent a market consensus glide path.

DEFINITION OF KEY STATISTICS AND TERMS

- **Returns:** A percentage figure used when reporting historical average compounded rate of investment return. All returns are annualized if the period for which they are calculated exceeds one year.
- **Universe Comparison:** The universe compares the fund's returns to a group of other investment portfolios with similar investment strategies. The returns for the fund, the index and the universe percentiles are displayed. A percentile ranking of 1 is the best, while a percentile ranking of 100 is the worst. For example, a ranking of 50 indicates the fund outperformed half of the universe. A ranking of 25 indicates the fund was in the top 25% of the universe, outperforming 75%.
- **Returns In Up/Down Markets:** This measures how the fund performed in both up and down markets. The methodology is to segregate the performance for each time period into the quarters in which the market, as defined by the index, was positive and negative. Quarters with negative index returns are treated as down markets, and quarters with positive index returns are treated as up markets. Thus, in a 3 year or 12 quarter period, there might be 4 down quarters and 8 up quarters. A simple arithmetic average of returns is calculated for the fund and the index based on the up quarters. A simple arithmetic average of returns is calculated for the fund and the index based on the down quarters. The up market capture ratio is the ratio of the fund's return in up markets to the index. The down market capture ratio is the ratio of the fund's return in down markets to the index. Ideally, the fund would have a greater up market capture ratio than down market capture ratio.
- **Standard Deviation:** Standard deviation is a statistical measure of the range of performance within which the total returns of a fund fall. When a fund has a high standard deviation, the range of performance is very wide, meaning there is a greater volatility. Approximately 68% of the time, the total return of any given fund will differ from the average total return by no more than plus or minus the standard deviation figure. Ninety-five percent of the time, a fund's total return will be within a range of plus or minus two times the standard deviation from the average total return. If the quarterly or monthly returns are all the same the standard deviation will be zero. The more they vary from one another, the higher the standard deviation. Standard deviation can be misleading as a risk indicator for funds with high total returns because large positive deviations will increase the standard deviation without a corresponding increase in the risk of the fund. While positive volatility is welcome, negative is not.
- **R-Squared:** This reflects the percentage of a fund's movements that are explained by movements in its benchmark index. An R-squared of 100 means that all movements of a fund are completely explained by movements in the index. Conversely, a low R-squared indicates very few of the fund's movements are explained by movements in the benchmark index. R-squared can also be used to ascertain the significance of a particular beta. Generally, a higher R-squared will indicate a more reliable beta figure. If the R-squared is lower, then the beta is less relevant to the fund's performance. A measure of diversification, R-squared indicates the extent to which fluctuations in portfolio returns are explained by market. An R-squared = 0.70 implies that 70% of the fluctuation in a portfolio's return is explained by the fluctuation in the market. In this instance, overweighting or underweighting of industry groups or individual securities is responsible for 30% of the fund's movement.
- **Beta:** This is a measure of a fund's market risk. The beta of the market is 1.00. Accordingly, a fund with a 1.10 beta is expected to perform 10% better than the market in up markets and 10% worse than the market in down markets. It is important to note, however, a low fund beta does not imply the fund has a low level of volatility; rather, a low beta means only that the fund's market-related risk is low. Because beta analyzes the market risk of a fund by showing how responsive the fund is to the market, its usefulness depends on the degree to which the markets determine the fund's total risk (indicated by R-squared).
- **Alpha:** The Alpha is the nonsystematic return, or the return that can't be attributed to the market. It can be thought of as how the manager performed if the market's return was zero. A positive alpha implies the manager added value to the return of the portfolio over that of the market. A negative alpha implies the manager did not contribute any value over the performance of the market.
- **Sharpe Ratio:** The Sharpe ratio is the excess return per unit of total risk as measured by standard deviation. Higher numbers are better, indicating more return for the level of risk experienced. The ratio is a fund's return minus the risk-free rate of return (30-day T-Bill rate) divided by the fund's standard deviation. The higher the Sharpe ratio, the more reward you are receiving per unit of total risk. This measure can be used to rank the performance of mutual funds or other portfolios.
- **Treynor Ratio:** The Treynor ratio measures returns earned in excess of that which could have been earned on a riskless investment per each unit of market risk. The ratio relates excess return over the risk-free rate to the additional risk taken; however, systematic risk is used instead of total risk. The Treynor ratio is similar to the Sharpe ratio, except in the fact that it uses the beta to evaluate the returns rather than the standard deviation of portfolio returns. High values mean better return for risk taken.

- **Tracking Error:** Tracking error measures the volatility of the difference in annual returns between the manager and the index. This value is calculated by measuring the standard deviation of the difference between the manager and index returns. For example, a tracking error of +/- 5 would mean there is about a 68% chance (1 standard deviation event) that the manager's returns will fall within +/- 5% of the benchmark's annual return.
- **Information Ratio:** The information ratio is a measure of the consistency of excess return. This value is determined by taking the annualized excess return over a benchmark (style benchmark by default) and dividing it by the standard deviation of excess return.
- **Consistency:** Consistency shows the percent of the periods the fund has beaten the index and the percent of the periods the index has beat the fund. A high average for the fund (e.g., over 50) is desirable, indicating the fund has beaten the index frequently.
- **Downside Risk:** Downside risk is a measure similar to standard deviation but focuses only on the negative movements of the return series. It is calculated by taking the standard deviation of the negative quarterly set of returns. The higher the factor, the riskier the product.
- **M-Squared:** M-squared, or the Modigliani risk-adjusted performance measure is used to characterize how well a portfolio's return rewards an investor for the amount of risk taken, relative to that of some benchmark portfolio and to the risk-free rate.

DEFINITION OF KEY PRIVATE EQUITY TERMS

- **PIC (Paid in Capital):** The amount of committed capital that has been transferred from the limited partner to the general partner.
- **TVPI (Total Value to Paid in Capital):** Money returned to limited partners plus the fund's unrealized investments, divided by money paid-in to the partnership. The TVPI should equal RVPI plus DPI.
- **DPI (Distribution to Paid In Capital):** Money returned (distributions) to limited partners divided by money paid in to the partnership. Also called cash-on-cash multiple.
- **RVPI (Residual Value to Paid In Capital):** The value of a fund's unrealized investments divided by money paid-in to the partnership.
- **Internal rate of return (IRR):** This is the most appropriate performance benchmark for private equity investments. It is a time-weighted return expressed as a percentage. IRR uses the present sum of cash drawdowns (money invested), the present value of distributions (money returned from investments) and the current value of unrealized investments and applies a discount.
- **Commitment:** Every investor in a private equity fund commits to investing a specified sum of money in the fund partnership over a specified period of time. The fund records this as the limited partnership's capital commitment. The sum of capital commitments is equal to the size of the fund.
- **Capital Distribution:** These are the returns that an investor in a private equity fund receives. It is the income and capital realized from investments less expenses and liabilities. Once a limited partner has had their cost of investment returned, further distributions are actual profit. The partnership agreement determines the timing of distributions to the limited partner. It will also determine how profits are divided among the limited partners and general partner.
- **Carried Interest:** The share of profits that the fund manager is due once it has returned the cost of investment to investors. Carried interest is normally expressed as a percentage of the total profits of the fund.
- **Co-Investment:** Co-Investments are minority investments made alongside a private equity investor in an LBO, a recapitalization, or an expansion capital transaction. It is a passive, non-controlling investment, as the private equity firm involved will typically exercise control and perform monitoring functions.
- **General Partner (GP):** This can refer to the top-ranking partners at a private equity firm as well as the firm managing the private equity fund.
- **GP Commitments:** It is normal practice for the GP managing a private equity fund to also make a financial commitment to the fund on the same basis as the LPs in the fund, and this is seen as an important factor driving the alignment of GP and LP interests. The historic benchmark for GP commitments has been 1% of the total fund size, but this is by no means universal, and many GPs commit significantly larger amounts. Furthermore, there has been a marked trend towards GPs making larger commitments to their funds over recent years.
- **Leveraged Buy-Out (LBO):** The acquisition of a company using debt and equity finance.
- **Limited Partner (LP):** Institutions or high-net-worth individuals/sophisticated investors that contribute capital to a private equity fund.
- **Public Market Equivalent (PME):** Performance measure used to evaluate performance relative to the market. It is calculated as the ratio of the discounted value of the LP's inflows divided by the discounted value of outflows, with the discounting performed using realized market returns.
- **Primaries:** An original investment vehicle that invests directly into a company or asset.

VALUATION POLICY

Fiducient Advisors does not engage an independent third-party pricing service to value securities. Our reports are generated using the security prices provided by custodians used by our clients. Our custodial pricing hierarchy is available upon request. If a client holds a security not reported by the first custodian within the hierarchy, the valuation is generated from the next custodian within the hierarchy, and so forth. Each custodian uses pricing services from outside vendors, where the vendors may generate nominally different prices. Therefore, this report can reflect minor valuation differences from those contained in a custodian's report. In rare instances where FA overrides a custodial price, prices are taken from Bloomberg.

REPORTING POLICY

This report is intended for the exclusive use of the client listed within the report. Content is privileged and confidential. Any dissemination or distribution is strictly prohibited. Information has been obtained from a variety of sources believed to be reliable though not independently verified. Any forecast represents median expectations and actual returns, volatilities and correlations will differ from forecasts. Please note each client has customized investment objectives and constraints and the investment strategy for each portfolio is based on a client-specific asset allocation model. Past performance does not indicate future performance and there is a possibility of a loss. Performance calculated net of investment fees. Certain portfolios presented may be gross of Fiducient Advisors' fees and actual performance would be reduced by investment advisory fees. This report does not represent a specific investment recommendation. Please consult with your advisor, attorney, and accountant, as appropriate, regarding specific advice.

Custodian reports are the reports that govern the account. There will be different account values between Fiducient Advisors' reports and the custodian reports based on whether the report utilizes trade date or settlement date to calculate value. Additionally, difference between values contained on reports may be caused by different accrued income values. Any forecasts represent future expectations and actual returns, volatilities and correlations will differ from forecasts. This report does not represent a specific investment recommendation. Please consult with your advisor, attorney, and accountant, as appropriate, regarding specific advice. Past performance does not indicate future performance and there is a possibility of a loss.

Manager performance for mutual funds and ETFs is based on NAV and provided by Lipper. Performance for non-mutual fund or ETF investments is based on the returns provided by managers, calculations based on a manager statement, or calculations based on a statement or data from the client's custodian. Unless specified otherwise, all returns are net of individual manager fees, represent total returns and are annualized for periods greater than one year. The deduction of fees produces a compounding effect that reduces the total rate of return over time. As an example, the effect of investment management fees on the total value of a client's portfolio assuming (a) quarterly fee assessment, (b) \$1,000,000 investment, (c) portfolio return of 8% a year, and (d) 0.50% annual investment advisory fee would be \$5,228 in the first year, and cumulative effects of \$30,342 over five years and \$73,826 over ten years. Additional information on advisory fees charged by Fiducient Advisors are described in Part 2 of the Form ADV.

MATERIAL RISKS & LIMITATIONS

Fixed Income securities are subject to interest rate risks, the risk of default and liquidity risk. U.S. investors exposed to non-U.S. fixed income may also be subject to currency risk and fluctuations.
-Liability Driven Investing (LDI) Assets

Cash may be subject to the loss of principal and over longer period of time may lose purchasing power due to inflation.
-Short Term Liquidity

Domestic Equity can be volatile. The rise or fall in prices take place for a number of reasons including, but not limited to changes to underlying company conditions, sector or industry factors, or other macro events. These may happen quickly and unpredictably.

International Equity can be volatile. The rise or fall in prices take place for a number of reasons including, but not limited to changes to underlying company conditions, sector or industry impacts, or other macro events. These may happen quickly and unpredictably. International equity allocations may also be impact by currency and/or country specific risks which may result in lower liquidity in some markets.

Real Assets can be volatile and may include asset segments that may have greater volatility than investment in traditional equity securities. Such volatility could be influenced by a myriad of factors including, but not limited to overall market volatility, changes in interest rates, political and regulatory developments, or other exogenous events like weather or natural disaster.

Private Equity involves higher risk and is suitable only for sophisticated investors. Along with traditional equity market risks, private equity investments are also subject to higher fees, lower liquidity and the potential for leverage that may amplify volatility and/or the potential loss of capital.

Private Credit involves higher risk and is suitable only for sophisticated investors. These assets are subject to interest rate risks, the risk of default and limited liquidity. U.S. investors exposed to non-U.S. private credit may also be subject to currency risk and fluctuations.

Private Real Estate involves higher risk and is suitable only for sophisticated investors. Real estate assets can be volatile and may include unique risks to the asset class like leverage and/or industry, sector or geographical concentration. Declines in real estate value may take place for a number of reasons including, but are not limited to economic conditions, change in condition of the underlying property or defaults by the borrow.

Marketable Alternatives involves higher risk and is suitable only for sophisticated investors. Along with traditional market risks, marketable alternatives are also subject to higher fees, lower liquidity and the potential for leverage that may amplify volatility or the potential for loss of capital. Additionally, short selling involved certain risks including, but not limited to additional costs, and the potential for unlimited loss on certain short sale positions.

OTHER

By regulation, closed-end funds utilizing debt for leverage must report their interest expense, as well as their income tax expense, as part of their total expense ratio. To make for a useful comparison between closed-end funds and both open-end funds and exchange-traded funds, adjusted expense ratios excluding interest and income tax expenses are utilized for closed-end funds within this report. See disclosure on closed-end fund fact sheets for information regarding the total expense ratio of each closed-end fund.

Please advise us of any changes in your objectives or circumstances.

CUSTODIAN STATEMENTS

Please remember to review the periodic statements you receive from your custodian. If you do not receive periodic statements from your custodian or notice issues with the activity reported in those statements, please contact FA or your custodian immediately.

AMITY REGIONAL SCHOOL DISTRICT NO. 5

Bethany Orange Woodbridge
25 Newton Road, Woodbridge, Connecticut 06525



Dr. Jennifer P. Byars
Superintendent of Schools

jennifer.byars@amityregion5.org
203.392.2106

Superintendent's Report – May 2025

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

Enhance the efficient and effective use of resources.

Foster a supportive climate for students and adults.

May 5 – May 9, 2025 was Teacher Appreciation Week. Many thanks are given to the PTSO's, students, and school administrators for their work to show the Amity teachers and staff how much they appreciate them.

Instruction

Seniors Last Day!: Friday, May 9, was the last day of class for our Seniors, and on May 12, 2025, they will begin three weeks of career exploration as part of either our off-campus Unpaid Experiential Learning Program (UELP) or here at school at the Senior Summit. This program is unique to Amity, and it is an excellent way for our soon-to-be graduates to develop more independence and explore career fields of interest prior to graduation. Best of luck with your projects, Seniors!

Graduation: The Commencement Exercises for the Class of 2025 will be held on June 10, 2025 at 4:00 p.m. at the William E. Sim Athletic Complex at Amity Regional High School.

Portrait of the Graduate: As a follow up to our April 23 presentation day, all junior students who presented received their written feedback this week. Staff who watched the presentations that day filled out written feedback which was delivered to students last week. Any remaining students who were absent or unable to present on April 23 are presenting to our POG coordinators after school. Coordinators hope to have all presentations completed before the end of the school year.

Global Issues Symposium: AMSO and AMSB 7th grade students presented their Global Issues projects to family, friends and peers on May 9, 2025. Students did an outstanding job selecting and researching an issue based on their interest. The wide variety of issues were presented including global warming, cell phone use in schools, drug use, water inequality, space debris, mental wellness, and world conflict.

ARHS Spring Concerts: ARHS held three concerts over the past two weeks, the Amity Orchestra Spring Concert on April 29, 2025, the student-produced Tri-M Music Honor Society spring concert on April 30, 2025, and the MusicFest celebration on May 8, 2025. Many thanks to our music teachers for guiding all of these performances.

AMSO Music Adjudication: The AMSO Spring Concert was held on May 7, 2025. In addition to performing in front of their families and friends, the performing groups participated in an adjudication by outside observers who are skilled in giving feedback to performers. The AMSO band received a rating of superior; the choir, chamber singers, orchestra, and jazz band all received a rating of excellent.

Chamber Singers World Tour: The AMSB Chamber Singers, an elite group of middle school musicians, will take their show on the road May 15, 2025. The group will travel to a few assisted living facilities and sing to the residents in an effort to spread positivity and provide a little musical entertainment.

National Language Exams Successes: Students in our high school World Languages classes recently took the National Language Exams, and we learned this week that Amity's French, Latin, and Spanish students earned 91 national awards and recognitions on this year's exams! This continues a trend of steady growth in our students' exam performance – we had 65 awards in 2022, 64 in 2023, 74 in 2024, and 91 in 2025. It's exciting to see such progress and rising recognition of our students' achievements.

AATSP Winners: The Connecticut Chapter of AATSP (American Association of Teachers of Spanish and Portuguese) sent us a special congratulations – not just for the incredible participation in this year's AATSP Poster Contest, but for absolutely dominating the competition! Congratulations to:

- 9–12 Digital Winners: 1st Place – Cora Doucette, 2nd Place – Amya Henthorn, and 3rd Place – Sawyer Wuerth-Stricker
- 9–12 Hand-Drawn Winners: 1st Place – Daphne Jordan, 2nd Place – Haze Khan, 3rd Place – Aroush Amir
- National Honorable Mention – Cora Doucette

Chinese Cultural Presentation: Chinese music and dance was celebrated at AMSO when the Phoenix Performing group presented a variety of Chinese music, poetry and dance. The performance was very well received by the student body.

Visit with High School Counselors: ARHS counseling staff will be visiting with our 8th graders at the middle schools in the upcoming weeks. This is the first chance for middle school students to meet their high school counselor, hear a little more about the services offered, and begin forming a relationship with an adult who will help guide them through the next four years.

Skill-Building at Lake Compounce: Students in the Spartan Academic and Independent Living Skills (SAILS) program (grades 9–12) participated in a skill-building field trip to Lake Compounce. During the trip, students practiced a variety of daily living and social skills, including waiting in lines, discussing food and ride preferences with peers, reading park maps and signs, interpreting food menus and placing orders, expressing personal likes and dislikes (e.g., "I like this ride" or "I don't like this ride"), and planning appropriate clothing and items based on the weather. This field trip serves as a culminating activity for the year-long focus on developing these essential life skills and is a much-anticipated annual event for our students.

ATA Graduation June 6th: Amity Transition Academy will be celebrating our students graduating from Amity Transition Academy. Graduation ceremonies will be held at Albertus Magnus on June 6, 2025. We are so proud of our students and wish them success as they transition to the next phase of their lives.

AMSB Art Trip: On May 29, 2025, a small group of AMSB students will be traveling to the Yale and British Art Museums for an artistic adventure. We appreciate AMSB Art Teacher Mrs. Smolinski for coordinating this meaningful trip.

Curriculum Articulation Meetings: Curriculum articulation meetings continue to occur. This month included VPA (performing and visual arts). A range of topics were covered, such as curriculum alignment and pacing, the integration of the Portrait of the Graduate into classroom lessons, and opportunities for targeted professional learning projecting to 25-26.

End of Year/Summer Curriculum Work: Various curricula are expected to be completed in the fall for BOE review. The Curriculum Council has trained 156 of our 233 certified staff to write curriculum.

Curriculum work before June 30 includes courses in the World Language, Math and Social Studies departments. Summer Curriculum Work includes courses in the World Language, Math, Social Studies, English, CTE and VPA departments.

PDEC: Our Professional Development Evaluation Committee (PDEC), comprised of teachers and administrators, continues to meet regularly to work with the developers of Frontline as we learn this new evaluation platform and prepare to roll this out to all staff in the fall.

Teacher Education & Mentor (TEAM) Program: The CT Department of Education (CSDE), in collaboration with the Regional Education Support Centers (RESCs), will be offering two virtual Training of Trainers (TOT) sessions. Participation in these sessions will grant individuals the eligibility to facilitate the Initial Support Teacher (IST) training to prospective mentors at the local level. This would allow Amity to train TEAM Mentors here in district and ultimately increase our TEAM Mentor pool. We currently have 3 Amity TEAM District Mentors who will engage in this training.

Walk & Talks: As Dr. Carlson transitions to her new role, she has spent time engaging in ongoing walk and talks with individual building administrators at all levels, department heads, and will continue this work with content leaders at the middle schools through the start of the 2025-2026 school year. This is a great way to not only build relationships with staff, but also gain a better understanding of curricular needs and classroom planning/instructional practices.

Middle School Schedule Update: We continue to look at programming for our students and how to be more responsive to their needs, voice, and choice. A survey will go out to all families, students, and staff the week of May 12 to gather input as we continue our work on revising the middle school schedule and course offerings.

One Week Down, One to Go: ARHS students have finished up one week of Advanced Placement exams, and they will continue through the end of next week. Good luck to all our students taking exams!

Reminder about Standardized Testing:

- Students in grade 8 will take the NGSS on May 12 and 13, 2025.
- SBA: Students in Grades 7 and 8 will begin SBA on May 19, 2025 and continue testing throughout that week.
- Prior administration of STAR, SBA, PSAT, School Day SAT, and NGSS data is found in PowerSchool where students and families can access this information.
- The 2025 SAT, SBA, and NGSS will be in PowerSchool in the fall.

Resources

Spring College Fair: Our annual spring College Fair took place on March 31, 2025 and it was great to see so many students and parents there getting started on their post-secondary planning. Over 80 colleges attended. Of the colleges and students that used the StriveScan app, we can see we had 158 attendees making 1191 interactions with college reps.

Aspiring Leadership Academy: We are excited to announce the launch of the Aspiring Leadership Academy for 2025-2026, a new professional learning opportunity for those who are interested in exploring leadership roles within Region 5. This academy is designed for any staff member who holds an 092 certification and aspires to move into administrative positions such as principal, assistant principal, instructional supervisor, department chair, central office administration, and more.

Climate

The Little Mermaid Receives Top Nominations: This year's *Stephen Sondheim Awards for Connecticut and Massachusetts High School Musical Theater* nominations have been announced. We are proud to share that Amity's production of *The Little Mermaid* was nominated for 9 awards, including our 16th consecutive nomination for Best Musical. Winners will be announced on May 17, 2025 at the Shubert Theater in New Haven. Congratulations to the cast, crew and orchestra! Nominations included:

- Lighting Design: Griffen Welander
- Sound Design: Merrin Holland
- Costume Design: Sophia Bernfeld, Ella Urban
- Achievement in Stage Management: Alyssa Salazar
- Direction: Rob & Andrea Kennedy
- Choreography: Andrea Kennedy
- Achievement by a Student Orchestra
- Ensemble
- Best Musical

Junior Prom: The Junior Prom took place on May 9, 2025 and we hope that everyone who attended the dance had an enjoyable and safe time celebrating.

New School Climate Legislation Update: New school climate legislation and policies have us planning to develop a revised comprehensive approach to school climate. This planning currently focuses on several key areas. First, we will examine communication strategies to ensure that all stakeholders – parents, students, and staff – are informed about the new policy. Additionally, we are planning to form or restructure dedicated school-based climate committees that will oversee the policy's implementation. These committees will ultimately create initial school climate improvement plans that outline specific goals and strategies tailored to meet the needs of their buildings. We are exploring a standardized student behavior reporting system to consistently address and document challenging behaviors – a new definition under the policy – across the schools. This system will ideally improve data collection methods, helping us monitor school climate and identify areas for improvement. We will expand our use of and incorporate restorative practices, which will require a professional development plan to equip staff with the necessary skills for the effective implementation of these practices.

Haven's Harvest Donations: The Amity Haven's Harvest team has received our donation totals for 2024. The ARHS club collected and redistributed 6640 lbs. of food last year! The agencies receiving ARHS food include: My Sisters Place (Ansonia), Abundance of Joy Learning Ctr (Ansonia), LEAP (New Haven), and Berger Apts (New Haven). Over the last three years, The Amity Haven's Harvest Club has rescued 18,250 lbs. of food!

Unified Sports Recognition: Congratulations to Amity seniors Anthony Palluzzi and Jenna Maus, who were honored at the 21st Annual Special Olympics Unified Sports Awards Banquet with the *Beau Doherty-Mike Savage Teammate Award* for their tremendous contributions to their classmates who are student-athletes in our Unified Sports program.

ODAAC Survey: The bi-annual survey conducted by Orange Youth Services, which is anonymous, will be administered to grades 7, 9, and 11 students during the week of May 19. The survey asks about student experiences with drugs, alcohol, and other various dangerous behaviors. The survey takes approximately 20 minutes to complete and students that have been opted out of the survey will be given an alternate activity during that time. An opt out letter and message was sent out to all families that this applies to. A copy of the survey can be viewed by appointment in any of the 3 buildings. Results of the survey are used to guide ODAAC programs promoting safe behavior and decision-making and provide support for the grants that fund ODAAC's work.

Unified Cornhole Tournament: Middle School Unified Sports will be competing in a cornhole tournament at Derby High School on Wednesday, May 21, 2025 from 3:30-5:00. A special thank you to our Unified Students, Partners, Adult Support, and our Coach Ms. Benton!

3rd Annual ATA/DMC Luncheon and Field Day: AMSB 8th grade digital media students are pleased to host the 3rd annual ATA/DMC Luncheon and Field Day on May 30, 2025 at the AMSB courtyard. This day brings together 8th grade digital media students from AMSB with students in our Amity Transition Academies. Students will enjoy field day games, a pizza lunch, digital media activities, and social time!

Amity Chess Club Hosts Tournament: On Saturday, April 26, 2025, the Amity Chess Club hosted a statewide tournament that featured a full day of chess competition for youth chess players from throughout Connecticut as well as some neighboring states.

Connecticut Finalist Rotary Speech Contest: Senior Jessie Zheng won the Connecticut finals for the Rotary International 4 - Way Speech Contest. This is a prestigious accomplishment for Jessie and an impressive win for Amity.

Model UN Conference: On April 27, 2025, the Amity Model UN club participated in Rocky Hill High School's Model UN conference, where our students did extremely well in competition. Congratulations to:

- ECOSOC: Project 2031 Committee: Best Delegate Emma Imanov, and Outstanding Delegate Chase Kinton
- Cabinet Crisis: Outstanding Delegate Aitan Herman
- DISEC: Protection of Press in War: Best Delegate Emma Mathew, and Outstanding Delegate Alexandra Palcic
- IAEA: Peaceful Use of Nuclear Energy: Commendation Luca DiSorbo

Holy Guacamole!: The AMSB seventh grade students on the green team were treated to a Cinco de Mayo cultural event sponsored by our PTSO. The students took time during their Spanish classes to make and taste some fresh guacamole. AMSB Spanish teacher Mrs. Blais coordinates this yearly celebration!

Stepping Up Ceremony: The 8th grade stepping up ceremonies will be held on June 11, 2025. Due to the high school graduation date this year we will have a change in our end of year middle school celebrations. We will ask that all 8th grade students come to school as usual at 7:30. Eighth grade students will have time to sign yearbooks, participate in some goodbye activities, and have a farewell breakfast with staff and students, sponsored by our PTSO. The Stepping Up Ceremony will begin at 9:00 a.m. All 7th grade students will not need come to school on June 11th.



2025

SCASA

Amity Regional High School

Tony Zhang

Claire Theiss

Amity Middle School Bethany

Julian Vanderberg

Khloe Rotheram

Amity Middle School Orange

Anthony Coppola

Abby Gesner

- **CRITERIA: THE SUPERINTENDENT -STUDENT AWARD/RECOGNITION PROGRAM AWARDS ARE BASED ON COMMUNITY SERVICE AND SERVICE TO OTHERS: ACADEMIC PROWESS (RELATIVE TO ABILITY); AND LEADERSHIP TO THE SCHOOL COMMUNITY. IT ALLOWS THE SUPERITENDENTS TO MOVE BEYOND THE ACADEMIC ACHIEVER WHO ROUTINELY RECEIVES RECOGNITION, AND TO USE THEIR DISCRETION AND UNDERSTANDING OF STUDENTS TO REACH A WIDER SPECTRUM, NOT OFTEN – OR PERHAPS NEVER CONSIDERED AS STARTS. RECIPIENTS MIGHT INCLUDE STUDENTS WITH DISABILITIES, VOCATION OR ALTERNATIVE SCHOOL STUDENTS. HOWEVER, RECIPIENTS ARE A LOCAL CHOICE.**

May 2025

April Ticket Summary

Tickets addressed and closed: 298

Tickets open: 8

HS Student Help Desk

Students helped: 320

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 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.
- Website redesign and major updates have been completed.

Projects in process:

- Preparing for student device collection at all three schools.
- Preparing plans for summer updates and refresh projects.
- Identifying student device models for purchase for next year.
 - using demo devices to test durability
 - comparing warranties
- Identifying new teacher devices.
- 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.



May 2025

CLEAN

SAFE

HEALTHY

SCHOOLS

Amity Regional School
District No. 5

25 Newton Road

Woodbridge, CT 06525

Phone: 203-397-4817

Fax: 203-397-4864



Amity Regional School District No. 5

Facilities Department Monthly Report

Completed Projects:

- The condenser and evaporator for the walk in freezer at ARHS was replaced by an outside contractor. Our in house electrician completed the electrical portion of the job.
- Repairs to the chiller at AMSO were done by an outside contractor. Our in house HVAC mechanic recharged the system and prepared it for the cooling season.
- Preventative maintenance work on the chillers District-wide were completed by our in house HVAC mechanic. Seasonal switchover from heating to cooling is done.
- The annual back flow device inspections were completed at AMSO by the Regional Water Authority, no deficiencies were found.
- Repairs to various areas in the driveway as well as a section of heaved sidewalk was repaired at ARHS.
- An electric motor for an exhaust fan in the CTE lab was replaced by our in house HVAC mechanic.
- Safety & Security Inspections were completed at AMSO and AMSB using Department of Homeland Security and PREPaRE Protocols.

Projects in Process

- The District is working with the Town of Woodbridge to address concerns with the fuel cell and micro-grid. UI, Fuel Cell, Amity and the Town have also been reviewing operating procedures and equipment maintenance schedules items connected to the fuel cell and micro-grid. Another meeting with all parties to discuss the plan and future operations is scheduled for June 2nd.
- Titan Energy has submitted the paperwork to the State for approval for the solar canopy project. We anticipate hearing a decision soon.
- 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 it's work order and building scheduling needs. Everything is on track for a July 1st kickoff.

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



To: Jennifer P. Byars, Superintendent of Schools

From: Theresa Lumas, Director of Finance & Administration

Date: May 5, 2025

Re: Electricity Net Metering Recommendation

Titan Energy presented an additional opportunity to save on electricity costs. There is an array in Ansonia that is already constructed and operational. The credits would be available in 1 to 2 billing cycles to a municipality serviced by United Illuminating. The Town of Woodbridge and the District were approached to utilize the available credits from this Virtual Net Metering Program. The proposal discussed at our May 5, 2025 meeting is attached. There is approximately \$1,000,000 in credits available over a 20-year period. The District can allocate credits to both Amity High School and Amity Middle School in Orange. Bethany is in Eversource territory so it is ineligible to participate.

Participating in the Net Metering Program will not affect the solar canopy project. Adam Teff explained that the Amity carport solar project is a behind-the-meter system in which the solar array will create power to reduce the number of kilowatt-hours purchased by UI, and thus, reduce energy expenses. The virtual net metering program is a financial transaction in the sense that the Ansonia array will generate dollar-credits that will be applied to the district's UI bills. The carport and VNM projects are meant to be complementary. This would be particularly helpful since the public benefit charges are currently anticipated to be more than budgeted for next year.

The Town and the District will have to decide on participation within 2 weeks.

Suggested motion:

For the AFC:

1. *The Amity Finance Committee recommends the Board authorize the Superintendent to enter into an agreement for the Virtual Net Metering program.*

For the BOE:

2. *The Board of Education authorizes the Superintendent to enter into an agreement for the Virtual Net Metering program.*



Solar Procurement Services

Virtual Net Metering Program for UI

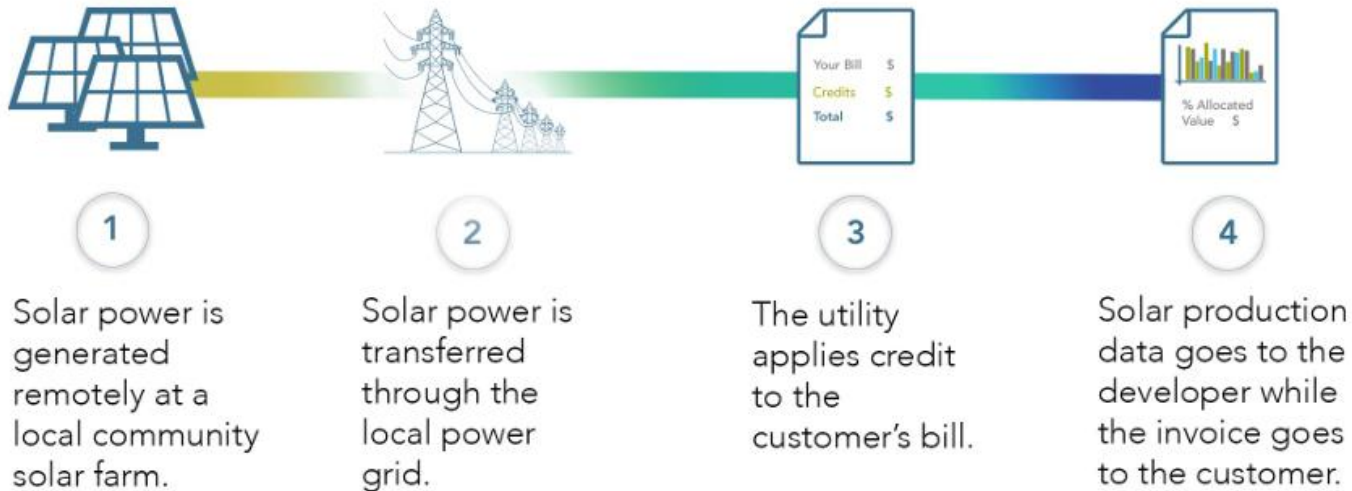
Regional School District #5



CCM Renewable Energy Procurement

- The Connecticut Conference of Municipalities and Titan Energy have collaborated to help CCM members procure and management renewable energy projects. In addition to traditional solar project management, CCM/Titan has created a program for municipalities to take advantage of the public policy measures enacted within the Virtual Net Metering program, which allows private developers to build large-scale solar projects that connect directly to UI's local grid, but only when they have a municipal partner.
- The municipal partner is entitled to utility bill credits associated with energy production of the array.
- As the system generates electricity, the output is metered by UI and converted to its equivalent dollar amount. Those credits are then distributed to the municipality's UI bills in the form of a line-item credit. These credits help pay your balances owed each month.
- There is zero cost to participate in the VNM program. The municipality's only responsibility is to pay for the credits at a set discount to their value (15%) over a 20-year period.
- **This particular opportunity is unique because the array is already constructed and operational – there is no prolonged wait to receive your credits. This is an immediate cost reduction opportunity.**

HOW VIRTUAL NET METERING WORKS



- ▲ \$0 upfront cost
- ▲ No equipment installed at property
- ▲ 100% renewable power
- ▲ Support the local economy
- ▲ Budgetary certainty, huge energy cost savings

HOW TO CALCULATE SAVINGS IN A VNM AGREEMENT

$$\text{CREDIT VALUE} * \text{DISCOUNT RATE} = \text{SAVINGS}$$

Total Year-1 Credit \$	Discount Rate	Year-1 Total Savings	Lifetime Savings
\$335,000.00	15.00%	\$50,250.00	\$1,005,000.00

Benz Street Solar Array; Ansonia CT



AMITY REGIONAL SCHOOL DISTRICT NO. 5

Bethany Orange Woodbridge
25 Newton Road, Woodbridge Connecticut 06525



Kathleen Kovalik
Assistant Director of Finance and Administration

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

To: Dr. Jennifer P. Byars, Superintendent of Schools
From: Kathleen Kovalik, Assistant Director of Finance and Administration
cc: Theresa Lumas, Director of Finance and Administration
Re: Food Service Management Contract Amendment
Date: May 5, 2025

I am recommending that the Board of Education extend its contract to operate the food service program for the year 2025-2026 with Compass Group, USA, Inc. (Chartwells). The District is entering the fourth year of an original five-year contract with Chartwells. The State Department of Child Nutrition reviews and approves food service bid documents, contract language and amendments. The amendment was approved at the State level and must be fully executed prior to July 1. The amendment proposes a negotiated 3.2% increase which is less than the maximum allowed based on the consumer price index (CPI) as outlined in the original agreement. The increase applies to the Management Fee rate and the Administrative Fee rate.

“Section 12.11(C) is being amended to reflect that Chartwells Management Fee shall be a flat rate of Two Thousand Seven Hundred and Ninety-Eight Dollars and Seventy-Four Cents (\$2,798.74) per month for 10 months (September through June).

This increase is based on Section 12.11(G) of the Agreement permitting the CPI adjustment of 3.2%, or \$86.78 added to the existing Management Fee of \$2,711.96.

Section 12.11(D) is being amended to reflect that Chartwells Administrative Fee shall be a flat rate of Ten Thousand Two Hundred and Fifty-One Dollars and Sixty-Two Cents (\$10,251.62) per month for 10 months (September through June).

This increase is based on Section 12.11(G) of the Agreement permitting the CPI adjustment of 3.2%, or \$317.88 added to the existing Administrative Fee of \$9,933.74.”

For Amity Finance Committee:

Move to recommend that the Amity Board of Education award a one-year contract extension for 2025-2026 to Compass Group, USA, Inc. (Chartwells) per the proposed Amendment and the Director of Finance and Administration is authorized to sign the Amendment.

For Amity Board of Education:

Move to award a one-year contract extension for food service operations for 2025-2026 to Compass Group, USA, Inc. (Chartwells) per the proposed Amendment and the Director of Finance and Administration is authorized to sign the Amendment.

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



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

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

To: Dr. Jennifer Byars, Superintendent of Schools

From: Theresa Lumas, Director of Finance and Administration

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

Date: April 30, 2025

Finance:

I recommend the following contracts over \$35,000 be awarded by the Amity Board of Education and waive the formal bid process in the Board's Policy on purchasing procedures:

1. Workers' Compensation Insurance and Liability, Automobile, Property Insurance:

Our current contract for workers' compensation (WC) and liability, automobile, property (LAP) insurance expires June 30, 2024. CIRMA (Connecticut Interlocal Risk Management Agency) has provided this coverage. I recently met with CIRMA representatives and our insurance consultant to discuss our claim history.

CIRMA has offered a 0.00% increase on Workers' Compensation for year 1. Years 2 and 3 would be adjusted for payroll increases and claims experience. LAP insurance is a 1.5% cap rate increase in year 1 and 3% in years 2 and 3. These are maximum increases possible; actual increases may be less. Positive claim experience going forward could lower the actual LAP increase. Negative claim experience would be capped at the stated rate caps each year.

The Workers' Compensation and the LAP insurance is a total package offer and cannot be split. It is a three-year contract.

Our insurance consultant reviewed the offer and commented "This is a very competitive offer from CIRMA, as most of the rate stabilization agreements I have seen are capped at 5%." The District also has a \$2,500 property deductible which it is unlikely other carriers will provide due to our proximity to the coast, and it is likely that CIRMA will increase in the next proposal.

We currently use CIRMA and we have excellent service. There has been a member equity distribution in each of the last three years. Member Equity Distributions are not guaranteed but have saved the District \$30,19 over the past three years. The premium quote is \$166,483 for Workers' Compensation

insurance and \$199,890 for the LAP insurance for the 2025-2026 fiscal year. The budgeted amounts are \$169,575 for WC and \$ 208,750 for LAP.

Recommended Motions:

Amity Finance Committee

Recommend the Amity Board of Education award the workers' compensation insurance for July 1, 2025 to June 30, 2028, to Connecticut Interlock Risk Management Agency (CIRMA) of New Haven, Connecticut at the price of \$166,483. Price increases for years two and three will be based on payroll increases and claims; and award the liability, automobile, property insurance to Connecticut Interlock Risk Management Agency (CIRMA) of New Haven, Connecticut for the price of \$199,890 for July 1, 2025 to June 30, 2026, with a maximum of a three-percent increase in the second and third years of the contract. This will be a three-year contract for workers' compensation and liability, automobile and property insurance. Recommend the Amity Board of Education waive the bid requirement.

Amity Board of Education

Award the workers' compensation insurance for July 1, 2025 to June 30, 2028, to Connecticut Interlock Risk Management Agency (CIRMA) of New Haven, Connecticut at the price of \$166,483. Price increases for years two and three will be based on payroll increases and claims; and award the liability, automobile, property insurance to Connecticut Interlock Risk Management Agency (CIRMA) of New Haven, Connecticut for the price of \$199,980 for July 1, 2025 to June 30, 2026, with a maximum of a three-percent increase in the second and third years of the contract. This will be a three-year contract for workers' compensation and liability, automobile and property insurance. Further, the Amity Board of Education waives the bid requirement.

2. Student Accident Insurance:

The District's insurance consultant marketed our account for Student Accident Insurance Coverage and received eight quotes. The prices ranged from \$60,165 to \$114,777 for the base policy. Our current premium is \$45,612 for the base and \$2,910 for catastrophic. The District experienced high losses for the year, including one claim of over \$30,000. Our current carrier, Bob McCloseky/Wellfleet, was the lowest bidder and further dropped the quote to \$57,500 for the base policy. We had good experience Bob McCloseky/Wellfleet. We submit payments through our insurance broker, H.D. Segur. The budgeted amount is \$51,053.

Amity Finance Committee:

Move to recommend the Amity Board of Education...

Amity Board of Education:

Move to ...

award the Student Accident Insurance bid to H.D. Segur Insurance of Wallingford, CT at the bid price of \$57,500 for Interscholastic Sports, including Student Activities and \$2,910 for Catastrophic Accident Coverage.

Facilities:

3. Snow Removal, Salting & Sanding Services:

The District received 7 bids for snow removal, salting and sanding. One bid was rejected (not meeting bid specifications); 4 vendors bid on all 3 campuses, 1 vendor bid on ARHS only and 1 vendor bid on AMSB only. The 3 campuses have different vendors with expiring 3-year contract. The 2 middle school vendors did not submit bids. Vendors are required to quote pricing on a variety of services:

1" - 6" Snow
6" - 9" Snow
9" and up Snow
Sand/Salt only
Heavy equipment hourly rate
Non-Winter weather event

No one vendor was the lowest on all services. The most common events, 1-6" Snow and Sand/Salt only were among deciding factors, fleet size and experience were other main factors.

Year 1 pricing:

AMSB: Jim's Landscaping bid \$925 for 1"-6", which was \$615 lower than the closest bidder.

AMSO: J&M Landscaping's bid for 1"-6" at AMSO was the lowest at \$1,397, others ranged from \$1,895-\$2,500. J&M Landscaping salting was lowest at \$375; the range is \$475-\$750.

ARHS: J&M Landscaping's bid for 1"-6" was the 2nd lowest at \$4,295, others ranged from \$3,700-\$5,395. J&M Landscaping salting was 2nd lowest at \$975, the range is \$895-\$1,250. The lowest bidder had a significantly smaller fleet size than the next lower bidder, J&M.

Mr. Martoni is recommending awarding the contract for snow removal to J&M Landscaping, 85 Norman Street, Orange, CT., for Amity High School and Amity Middle School Orange; and to Jim's Landscaping, 15 Atwater Road, Bethany, CT., for Amity Middle School Bethany.

I agree with Mr. Martoni's recommendation. The budgeted amount is \$82,000.

Amity Finance Committee:

Move to recommend the Amity Board of Education approve –

Amity Board of Education:

Move to award –

...the snow removal, salting and sanding services to J&M Landscaping, 85 Norman Street, Orange, CT., for Amity High School and Amity Middle School Orange; and to Jim's Landscaping, 15 Atwater Road, Bethany, CT., for Amity Middle School Bethany. The Board reserves the right to cancel either contract if the awarded vendor fails to perform in a satisfactory manner.

4. Site-Based Grounds Maintenance Program:

Three bids were submitted for Site-Based Grounds Maintenance for all 3 campuses. The vendors are Prestige Landscaping, Greenway Property Services, and Sports Turf Management. Of the three bids, the total bid price ranged from \$209,250 to \$349,750, with Prestige Landscaping coming in lowest at \$209,250 for year 1 pricing. Sports Turf landed in the middle at \$229,500.

Mr. Martoni is recommending Sports Turf Management for the site-based grounds management services for the a 3-year contract, renewable each year. Mr. Kevin Capecelatro has a proven track record managing the grounds and athletic complex at Amity for over 20 years and winning an award for best high school athletic complex in Connecticut. Kevin continues to go above and beyond for Amity, doing jobs not within his scope of work and volunteering his time and services to Amity. He engages with the students, teaching them about his trade, is always available, and takes the time to listen to what the coaches need for events. With his experience, he knows what fields need and can take a non-playable field and get it ready for play.

Over a span of seventeen years, Mr. Capecelatro has been consistent with pricing, holding pricing flat for some years, including a five-year stretch. Over the past seventeen years, he has increased his contract price by just \$15,000.00. Sports Turf of Connecticut of Orange, CT has provided outstanding service and many extra services above the contract requirements.

I agree with Mr. Martoni's recommendation to award the contract for a three-year period, beginning July 1, 2025, at the current price of \$229,500, year 2 a price of \$234,000 and year 3 price of \$238,500. The budget is \$230,000.

Amity Finance Committee

Move to recommend the Board award ...

Amity Board of Education

Move to award...

.... the site-based grounds maintenance program for July 1, 2025, to June 30, 2028, to Sports Turf Management of Orange, Connecticut, at the price of \$229,500 for year one of a three-year contract period. The Board reserves the right to cancel the contract if Sports Turf Management of Orange, Connecticut, fails to perform in a satisfactory manner.

AMITY REGIONAL SCHOOL DISTRICT NO. 5

Bethany Orange Woodbridge
25 Newton Road, Woodbridge Connecticut 06525



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

To: Dr. Jennifer P Byars, Superintendent of Schools
From: Kathleen Kovalik, Assistant Director of Finance and Administration
cc: Theresa Lumas, Director of Finance and Administration
Re: Tuition Rate 2025-2026
Date: May 5, 2025

I am recommending the tuition rate for the 2025-2026 school year be set at \$22,442.00 for non-resident students. This tuition increase represents a 3.724% increase or \$806.00 above the current tuition rate of \$21,636.00. In the current school year there were seven non-resident students enrolled, including three children of staff members. One student will graduate in June 2025. The 2025-2026 budget includes revenue from six tuition students, three discounted. The non-resident tuition rate is calculated using the State Department of Education Net Current Expenditure per Pupil formula indexed for 2025-2026.

I am also proposing the following rate for non-resident tuition students identified as special education and placed at Amity Regional School District by another public school district through an IEP. The base rate is \$23,240.00. This is derived from the Net Current Expenditure Per Pupil indexed for the 2025-2026 school year. Additional services required by a student's Individual Education Plan (IEP) will be added to the base tuition rate. These services are billed based on the actual costs the District incurs.

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

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

Behaviorist (BCBA) - \$155/hr.
Speech/Language - \$76/hr.
Assistive Technology - \$155/hr.
Occupational/Physical Therapy - \$104/hr.
Hearing direct services - \$265/hr.
Hearing Consults - \$295/hr.
Counseling (SW/Psych) - \$71/hr.

Behavioral Therapist - \$60/hr.
Tutor - \$35.00/hr.

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

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

Amity Finance Committee:

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

Board of Education:

Move to approve...

... the non-resident tuition rate for 2025-2026 school year at \$22,442.00; and the the non-resident Special Education base tuition rate for 2025-2026 school year at \$23,240.00 plus any additional services

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	MAR 25	CHANGE	APR 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	47,865	822,233	(99,849)	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	47,865	56,407,703	(48,949)	UNF
6	SALARIES	29,108,667	31,251,456	31,155,007	(250,498)	30,904,509	(346,947)	FAV
7	BENEFITS	5,796,459	6,828,489	6,813,607	(6,676)	6,806,931	(21,558)	FAV
8	PURCHASED SERVICES	9,433,792	10,242,333	10,034,651	(73,026)	9,961,625	(280,708)	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	3,661,268	(72,411)	3,588,857	129,473	UNF
11	EQUIPMENT	169,506	200,101	216,261	10,251	226,512	26,411	UNF
12	IMPROVEMENTS / CONTINGENCY	272,756	392,500	232,500	0	232,500	(160,000)	FAV
13	DUES AND FEES	169,465	224,178	229,178	(29,000)	200,178	(24,000)	FAV
14	TRANSFER ACCOUNT	1,091,054	0	0	0	0	0	FAV
15	TOTAL EXPENDITURES	53,621,146	56,456,652	56,200,683	(421,360)	55,779,323	(677,329)	FAV
16	SUBTOTAL	991,268	0	159,155	469,225	628,380	628,380	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	159,155	469,225	628,380	628,380	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	MAR 25	CHANGE	APR 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	47,865	794,955	(98,973)	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	47,865	822,233	(99,849)	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	47,865	56,407,703	(48,949)	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	MAR 25	CHANGE	APR 25	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
1	5111-CERTIFIED SALARIES	23,917,065	25,596,300	25,674,779	(250,498)	25,424,281	(172,019)	FAV
2	5112-CLASSIFIED SALARIES	5,191,602	5,655,156	5,480,228	0	5,480,228	(174,928)	FAV
3	SALARIES	29,108,667	31,251,456	31,155,007	(250,498)	30,904,509	(346,947)	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	(6,676)	18,760	11,170	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	(6,676)	6,806,931	(21,558)	FAV
20	5322-INSTRUCTIONAL PROG IMPROVEMENT	61,690	64,200	64,200	15,380	79,580	15,380	UNF
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	(50,000)	2,306,124	7,992	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	3,975,540	(11,129)	3,964,411	(56,095)	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	(13,686)	101,390	(13,686)	FAV
27	5560-TUITION EXPENSE	2,712,997	3,093,272	2,867,733	(13,591)	2,854,142	(239,130)	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	10,034,651	(73,026)	9,961,625	(280,708)	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	MAR 25	CHANGE	APR 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	920,511	0	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	(22,380)	392,422	(52,380)	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	72,930	1,000	73,930	13,000	UNF
38	5621-NATURAL GAS	84,228	104,180	89,180	0	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	(20,000)	149,281	(29,000)	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	267,296	(20,780)	246,516	(10,780)	FAV
43	5695-OTHER SUPPLIES-TECHNOLOGY	434,917	456,945	447,845	(10,251)	437,594	(19,351)	FAV
44	SUPPLIES (INCLUDING UTILITIES)	3,161,505	3,459,384	3,661,268	(72,411)	3,588,857	129,473	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	10,251	172,211	26,411	UNF
49	EQUIPMENT	169,506	200,101	216,261	10,251	226,512	26,411	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	(100,000)	0	(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	(60,000)	0	(60,000)	(60,000)	FAV
54	IMPROVEMENTS / CONTINGENCY	272,756	392,500	232,500	0	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	MAR 25	CHANGE	APR 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	(15,000)	76,855	(10,000)	FAV
57	5810-DUES & FEES	90,504	111,435	111,435	(14,000)	97,435	(14,000)	FAV
58	DUES AND FEES	169,465	224,178	229,178	(29,000)	200,178	(24,000)	FAV
59	5856-TRANSFER ACCOUNT	1,091,054	0	0	0		0	FAV
60	TOTAL EXPENDITURES	53,621,146	56,456,652	56,200,683	(421,360)	55,779,323	(677,329)	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**



April 2025

2024-2025 FORECAST

OVERVIEW

The projected unspent fund balance for this fiscal year is \$628,380 FAV, previously \$159,155 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 **\$48,949 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%
April	.40%	4.42%

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 \$98,973 UNF, previously \$146,838 UNF due to the 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 on the excess cost report.*

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 *\$677,329 FAV, previously \$255,969 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 \$172,019 FAV, previously \$78,479 UNF.* The need for substitutes has increased significantly year-over-year partially due to paid FMLA and increased school

business days, but not as high as anticipated in the third quarter of FY25. The account may be on budget now, previously \$67,000 UNF. However, 6th period coverages are down year over year, \$110,000 FAV and degree changes are under budget \$24,420 FAV. There will be \$13,000 FAV less spent on curriculum writing and a transfer is requested this month for professional development services.

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 \$174,928 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 98.9% 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>	\$ 401,225	\$ 332,509	\$ 68,716	\$ 266,018	\$ 222,547
MAY	\$ 348,408	\$ 348,408	\$ -	\$ 456,890	\$ 486,004
JUN	\$ 348,237	\$ 348,237	\$ -	\$ 369,321	\$ 302,891
TOTALS	\$ 4,838,438	\$ 4,891,532	\$ (53,094)	\$ 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%	98.9%

***Incomplete billing cycle in July 2023**

**FEEES 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>	\$ 55,644	\$ 50,345	\$ 5,299	\$ 46,575	\$ 43,145
MAY	\$ 54,104	\$ 54,104	\$ -	\$ 41,342	\$ 47,499
JUN	\$ 44,360	\$ 44,360	\$ -	\$ (6,272)	\$ 18,816
TOTALS	\$ 497,959	\$ 633,867	\$ (135,908)	\$ 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 2 quarters billing, \$11,170 UNF, previously \$17,846 UNF.

LINE 20 on Page 3: 5322-INSTRUCTIONAL PROGRAM IMPROVEMENT:

The forecast is projected to be over budget due to additional training providing in curriculum writing and cognitive coaching. There is a transfer requested this month for \$15,380. *The account will be \$15,380 UNF, previously neutral.*

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, \$7,992 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 \$56,095 FAV, previously \$44,966 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 \$239,130 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	FY21-22	FY22-23	FY23-24	FY24-25	FY24-25
	ACTUAL	ACTUAL	ACTUAL	ACTUAL	BUDGET	FORECAST

Sound	5	3	3	3	5	<i>4</i>
Trumbull	3	1	3	4	4	<i>3</i>
Nonnewaug	7	9	7	8	8	<i>4</i>
Emmett O'Brien	0	0	2	2	2	<i>2</i>
Common Ground Charter HS	1	1	3	2	1	<i>0</i>
Fairchild Wheeler	0	0	0	0	0	<i>1(1)</i>
NH Coop Arts	0	0	0	0	0	<i>1</i>
Wintergreen Magnet	0	1	0	0	0	<i>0</i>
Marine Science Magnet HS	0	0	1	0	0	<i>0</i>
Engineering Science Magnet	0	0	0	0	0	<i>1</i>
Lyman Hall-Vo- AG School	0	0	0	0	0	<i>1</i>
Totals	16	15	20	17	18	<i>17(17)</i>

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	<i>19</i>

Public (ACES) and private out-of-district placements are \$79,308 FAV, previously \$65,717 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	<i>9</i>
Private SPED	27	20	16	19	16	<i>15</i>
Totals	33	30	25	27	27	<i>24(24)</i>

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 \$208,109 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 4,962 degree days to date as opposed to 3,746 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 35 on Page 4: 5611-INSTRUCTIONAL SUPPLIES: *The forecast is projected to be \$52,380 FAV, previously \$22,380 FAV.*

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 \$2,000 FAV, previously \$3,000 FAV. There is a transfer requested this month for oil for \$13,000.*

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 40 on Page 4: 5641-TEXTBOOKS:

The forecast is projected to be \$29,000 FAV, previously neutral. Mr. Purcaro negotiated better pricing on the social studies orders.

LINE 42 on Page 4: 5690-OTHER SUPPLIES:

The forecast is projected to be \$10,780 FAV, previously neutral.

LINE 43 on Page 4: 5695-OTHER SUPPLIES-TECHNOLOGY:

The forecast is projected to be \$19,351 FAV, previously \$9,100 FAV. A transfer is requested this month to move funds to equipment replacement.

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 \$26,411 UNF, previously \$16,160 UNF. A transfer was approved in October to cover the purchase of an additional 20 teacher devices (40 in total). A transfer is requested this month to consolidate the remaining funds in technology and purchase replacement laptops for the administrators.

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 was a transfer approved in April to cover increased electricity charges. The facilities contingency balance is zero, previously zero.*

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 was a transfer in April to*

cover increased electricity charges. The contingency balance is \$90,000, previously \$90,000.

LINE 56 on Page 4: 5581-TRAVEL AND CONFERENCES:

The forecast projects there will be \$10,000 FAV, previously neutral.

LINE 57 on Page 4: 5810-DUES & FEES:

The forecast projects there will be \$14,000 FAV, previously neutral.

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: \$150,245

\$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.

\$28,000 Facilities: Our in-house HVAC Technician saved the District approximately \$5,000 by recharging the chiller at AMSO with refrigerant after Trane conducted the leak check. This was based on Trane's quote to do the same work. Our in-house HVAC Technician also saved the District approximately \$18,000 by completing the needed preventative maintenance work on the two chillers at ARHS. Again, this is based on a quote received from Trane to do the work.

In working with another supplier of custodial supplies (paper goods, liners, chemicals, etc.) Mr. Martoni was able to save the District approximately \$5,000 since February 2025.

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).

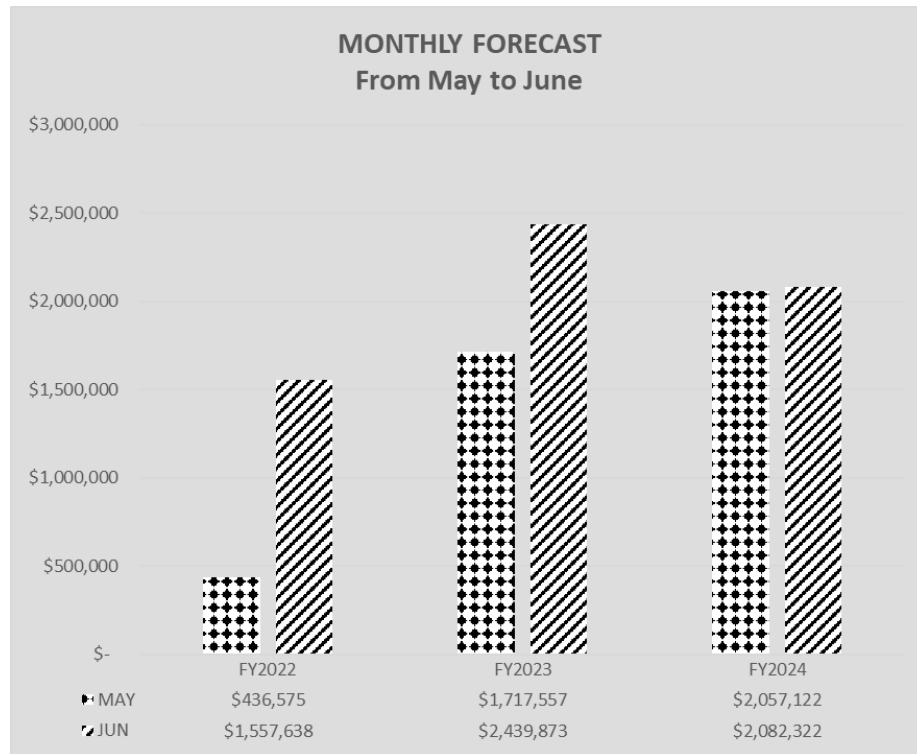
Revenues can be most impacted by decisions made at the State level for Special Education and Transportation grants. We have seen the reimbursement rate change in mid-year.

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

FY2023:

The audited fund balance is \$1,346,323 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.

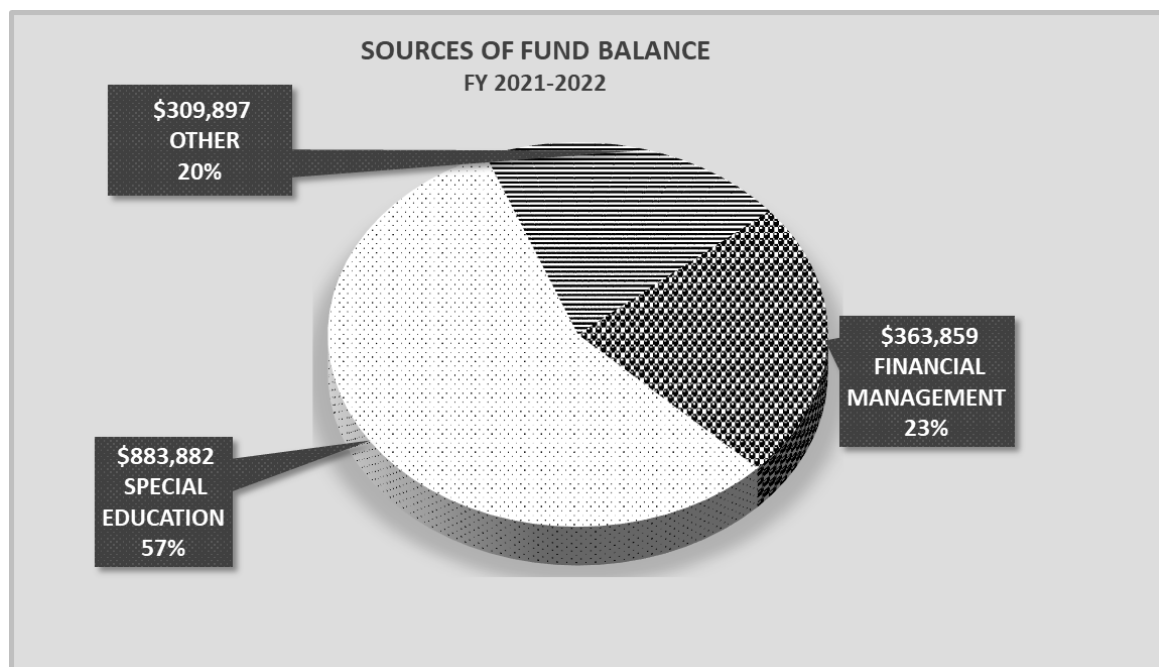
\$18,429 PURCHASED SERVICES (OTHER): Other purchased services accounts were under budget collectively by \$8,666 due to less printed materials and catered events. Data processing was under budget by \$9,763 as the administration consolidated onboarding software options at a reduced cost.

\$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..

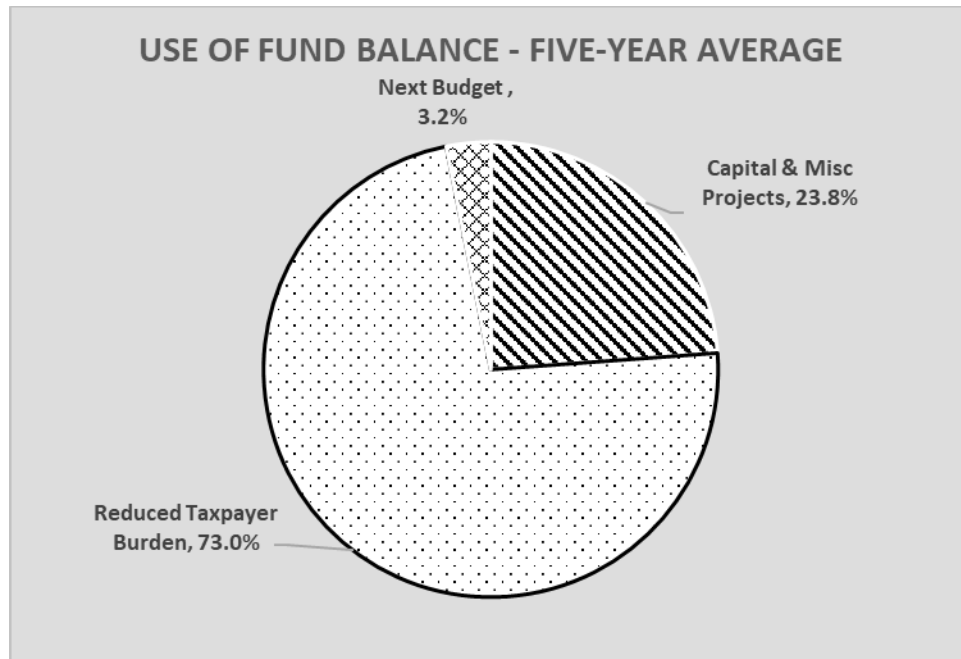
The primary sources of the fund balance are shown graphically below:



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.

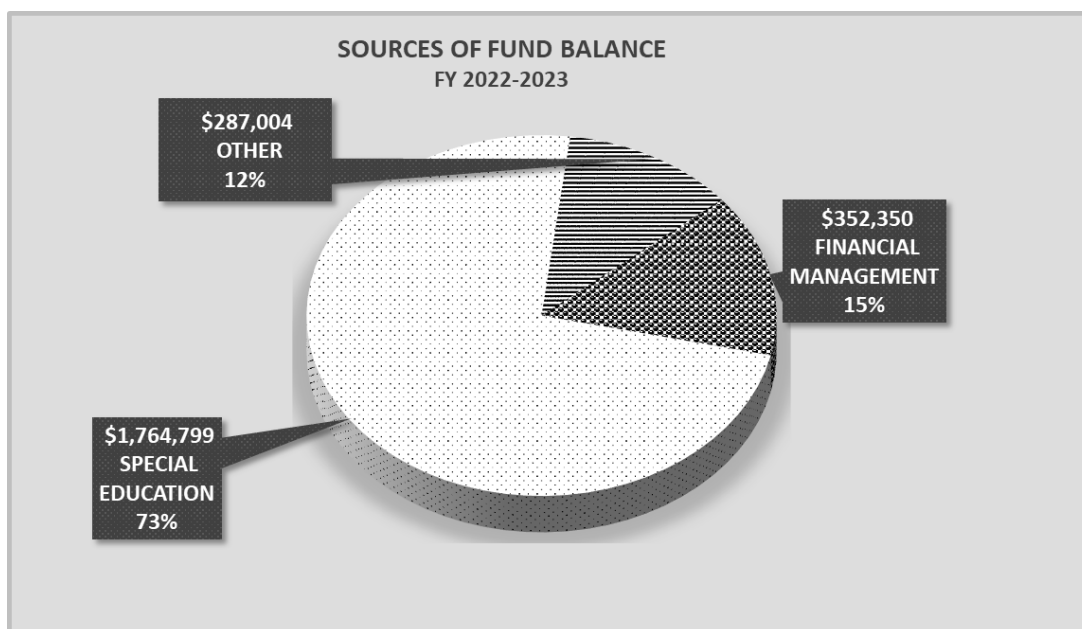
\$103,184 MEDICAL: The medical account was under budget \$103,184 due to the high staff turnover.

\$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.

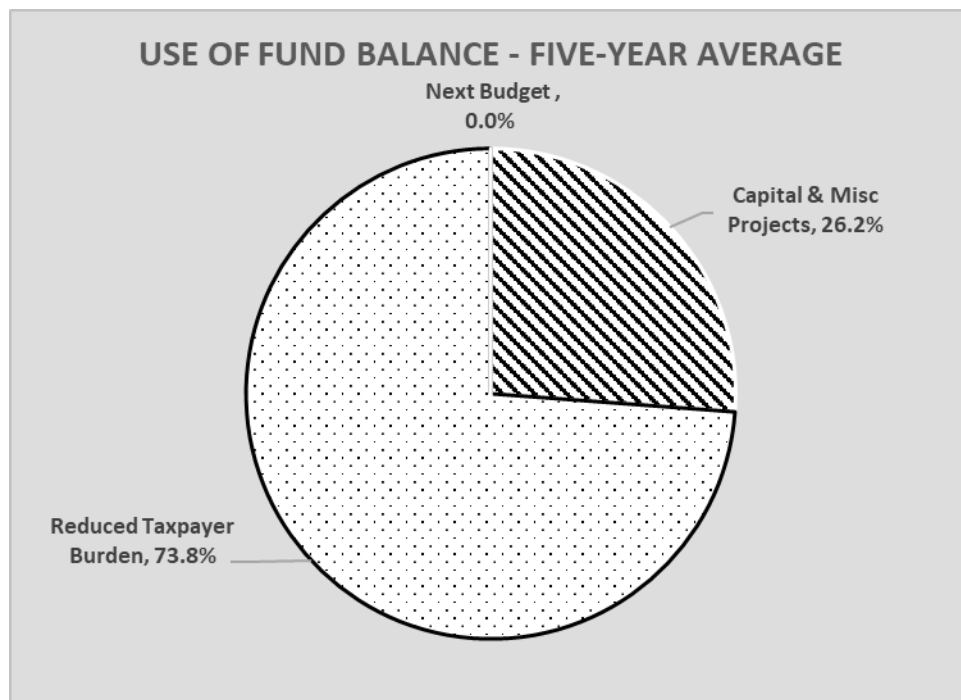
The primary sources of the fund balance are shown graphically below:



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.

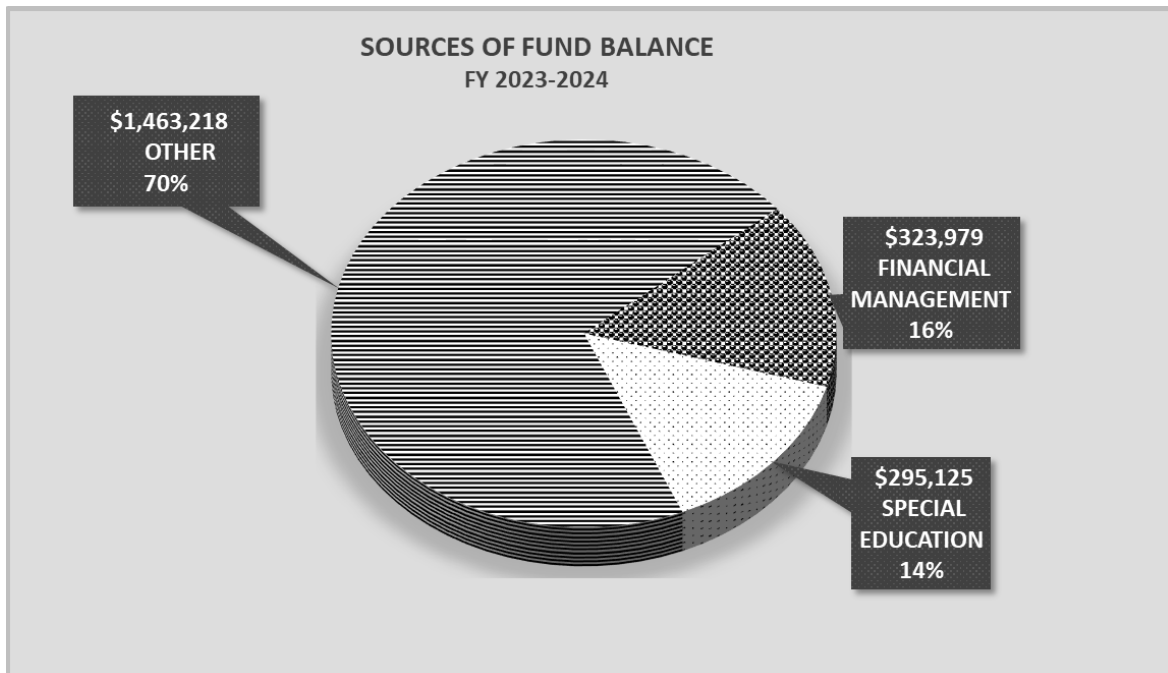
\$63,947 UTILITIES: Electricity, natural gas and oil were all under budget due to a mild winter and cooler spring.

\$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.

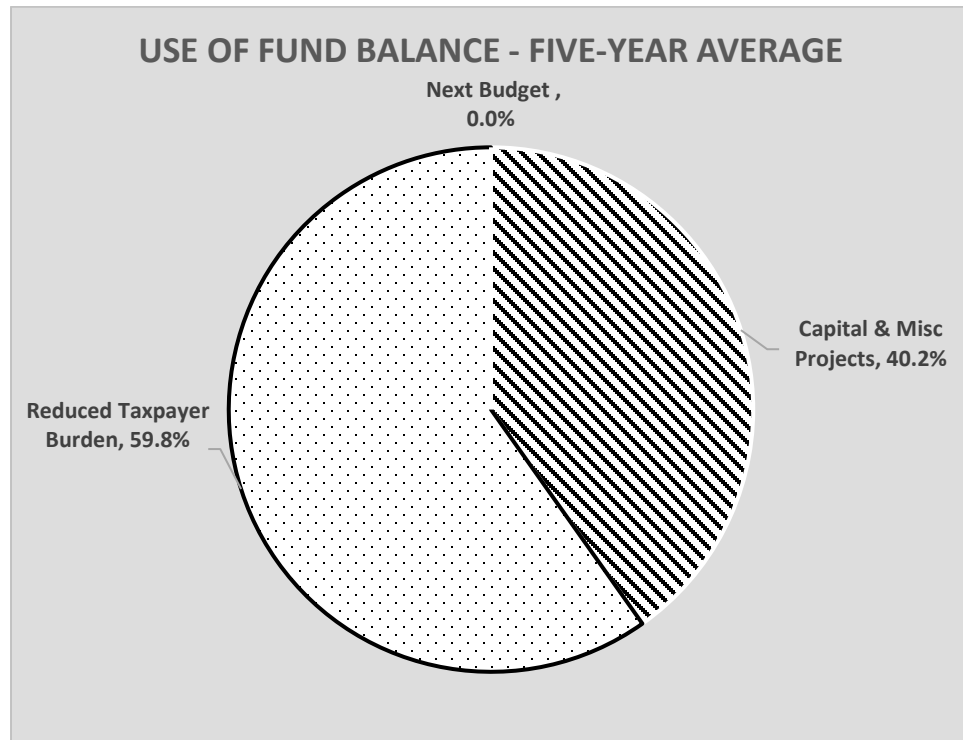
The primary sources of the fund balance are shown graphically below:



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 Subscript Piano Marvel
NOV '2024	89 1	-02-14-2350-5695 TECHNOLOGY SUPPLIES	\$ 700.00	Addition Subscript 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
MAR '2025	264 1	-03-11-1010-5420 REPAIRS,MAINTENANCE & CLEANING	\$ (1,240.00)	Cello Unrepairable-Replacement
MAR '2025	264 1	-03-11-1010-5731 EQUIPMENT - REPLACEMENT	\$ 1,240.00	Cello Unrepairable-Replacement
APR '2025				
APR '2025	19 1	-03-11-1014-5810 DUES & FEES	\$ 1,000.00	Ap Us History Workshop
APR '2025	19 1	-03-11-1014-5690 OTHER SUPPLIES	\$ (1,000.00)	Ap Us History Workshop
APR '2025	90 1	-05-14-2660-5330 PROFESSIONAL & TECH SRVC	\$ (602.00)	Security Window Film
APR '2025	90 1	-05-14-2660-5715 IMPROVEMENTS TO BUILDINGS	\$ 602.00	Security Window Film
APR '2025	91 1	-05-14-2660-5690 OTHER SUPPLIES	\$ (207.00)	Security Window Film
APR '2025	91 1	-05-14-2660-5715 IMPROVEMENTS TO BUILDINGS	\$ 207.00	Security Window Film
APR '2025	155 1	-03-14-2600-5613 MAINTENANCE/CUSTODIAL SUPPLIES	\$ (500.00)	Rent Uhaul Truck-Referendum
APR '2025	155 1	-05-14-2600-5440 RENTALS-LAND,BLDG,EQUIPMENT	\$ 500.00	Rent Uhaul Truck-Referendum
APR '2025	158 1	-03-11-3202-5330 PROFESSIONAL & TECH SRVC	\$ (1,928.00)	Ice Hockey Rentals
APR '2025	158 1	-03-11-3202-5440 RENTALS-LAND,BLDG,EQUIPMENT	\$ 1,928.00	Ice Hockey Rentals
APR '2025	174 1	-04-12-6130-5560 TUITION EXPENSE	\$ (2,000.00)	Tutoring For Homebound Student
APR '2025	174 1	-04-15-1204-5330 PROFESSIONAL & TECH SRVC	\$ 2,000.00	Tutoring For Homebound Student
APR '2025	196 1	-03-14-2600-5613 MAINTENANCE/CUSTODIAL SUPPLIES	\$ (500.00)	Uhaul Truck - Referendum Signs
APR '2025	196 1	-05-14-2600-5440 RENTALS-LAND,BLDG,EQUIPMENT	\$ 500.00	Uhaul Truck - Referendum Signs

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 oil purchases for Amity Middle School-Bethany. The purchase order amount needs to be increased to cover the final deliveries.

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
01-14-2600-5613	Custodial - Supplies	\$13,500	
01-14-2600-5620	Heat/Oil		\$13,500

Technology:

This budget transfer request is to consolidate all the technology account into the district wide account to prioritize purchases for the rest of the year. The planned purchase is to replace administrator laptops that are more than 5 years old and starting to fail.

Motions:

For the Amity Finance Committee:

Recommend the Amity Board of Education approve...

For the Amity Board of Education:

Move to approve...

...the following budget transfer for administrator laptops

FACILITY	ORG	OBJ	ACCOUNT DESCRIPTION	FROM	TO
01	01142350	5695	TECH SUPPL	3,555	
02	02142350	5695	TECH SUPPL	1,580	
03	03111001	5733	EQ-TECH-R	503	
03	03111005	5695	TECH SUPPL	6	
03	03111006	5695	TECH SUPPL	926	
03	03111006	5733	EQ-TECH-R	600	
03	03111008	5695	TECH SUPPL	1,110	
03	03111008	5733	EQ-TECH-R	3,528	
03	03111009	5695	TECH SUPPL	2,728	
03	03111013	5733	EQ-TECH-R	1,000	
03	03132400	5695	TECH SUPPL	346	
05	05142350	5733	EQ-TECH-R		15,882

Staff Development:

Dr. Perry-Carlson is requesting a transfer to cover professional development services for curriculum writing and cognitive coaching sessions.

For the Amity Finance Committee:

Recommend the Amity Board of Education approve...

For the Amity Board of Education:

Move to approve this transfer for professional development services.

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
05-13-2213-5111	Salaries-Curriculum	\$13,000	
05-13-2213-5611	Supplies-Curriculum	\$2,380	
05-13-2212-5322	Professional-Tech Services		\$15,380

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 of \$3,000 or More **2024-2025**

Date: May 1, 2025

I recommend the Amity Finance Committee and Board of Education approve the following budget transfer(s) of over \$3,000:

Standard year end budget transfers:

During the end of year processing, we will need to make a number of budget transfers to salary and benefit accounts and to pay other standard charges (e.g., special education expenditures; utilities; etc.). The exact amount of these budget transfers will depend on the final invoices. These budget transfers are part of the normal closing process.

Amity Finance Committee:

Move to recommend the Amity Board of Education authorize –

Amity Board of Education:

Move to authorize –

... the Director of Finance and Administration to make the necessary budget transfers to salary and benefit accounts and to pay other standard charges. These budget transfers may exceed \$3,000. The Director of Finance and Administration will report all budget transfers made to the Amity Finance Committee and Amity Board of Education.

Students

Search and Seizure

The Amity Regional School District No. 5 (District) Board of Education (Board) seeks to ensure a learning environment which protects the health, safety and welfare of students and staff. To assist the Board in attaining these goals, District officials may, subject to the requirements below, search a student's person and property, including property assigned by the District for the student's use. Such searches may be conducted at any time on District property or when the student is under the jurisdiction of the District at school-sponsored activities.

All searches for evidence of a violation by the District shall be subject to the following requirements:

1. The District official shall have individualized, "*reasonable suspicion*" to believe evidence of a violation of law, Board policy, administrative regulation or school rule is present in a particular place.
2. The search shall be "*reasonable in scope*." That is the measures used are reasonably related to the objectives of the search and not excessively intrusive in light of the age, sex, maturity of the student, and nature of the infraction.
3. District officials may also search when they have reasonable information that emergency/dangerous circumstances exist.

Desks and School Lockers

Desks and school lockers are the property of the schools. The right to inspect desks and lockers assigned to students may be exercised by school officials to safeguard students, their property and school property with reasonable care for the Fourth Amendment rights of students.

The exercise of the right to inspect also requires protection of each student's personal privacy and protection from coercion. An authorized school administrator may search a student's locker or desk under three (3) conditions:

1. There is reason to believe that the student's desk or locker contains the probable presence of contraband material.
2. The probable presence of contraband material poses a serious threat to the maintenance of discipline, order, safety and health in the school.
3. The student(s) have been informed in advance that school Board policy allows desks and lockers to be inspected if the administration has reason to believe that materials injurious to the best interests of students and the school are contained therein.

Use of drug-detection dogs and metal detectors, or similar detective devices may be used only on the express authorization of the Superintendent in accordance with Board policy.

District officials may seize any item which is evidence of a violation of law, Board policy, administrative regulation or school rule, or which the possession or use of is prohibited by such law, policy, regulation or rule.

Student Search

Students

Search and Seizure

A student may be searched if there are reasonable grounds for suspecting that the search will turn up evidence that the student has violated or is violating either the law or the rules of the school the scope of the search must be reasonably related to the objectives of the search and the nature of the infraction.

Students may be searched by law enforcement officials on school property or when the student is under the jurisdiction of the district upon the request of the law enforcement official. Such requests, ordinarily, shall be based on warrant. The school Principal or designee will attempt to notify the student's parents in advance and will be present for all such searches.

Strip searches shall not be conducted by school authorities. All searches by the Principal or his/her designee shall be carried out in the presence of another adult witness.

Legal Reference: Connecticut General Statutes

10-221 Boards of Education to prescribe rules

New Jersey v. T.L.O., 469 US 325; 105 S.CT. 733

Safford Unified School District #1 v. Redding (U.S. Sup. CT 08-479)

Students

Use of Dogs to Search School Property

The Amity Board of Education believes its schools provide a safe and orderly environment in which to learn. The Board is confident that the administration acts diligently to implement Board of Education policies geared to bar illegal substances from school and to respond to situations in which illegal substances are detected. Given the prevalence of illegal substances among the youth population in our society, the Board wants to convey a strong message to the community, faculty, staff, and student body concerning the use or possession of illegal substances within the Amity Regional School District.

When the Superintendent determines that the existence of illegal substances is creating a disruption of the educational environment, the Superintendent may invite the appropriate police authority to search school property with dogs trained for the purpose of detecting the presence of illegal substances. The purpose of such a search shall be to protect the health and safety of students, employees or property and to detect the presence of illegal substances. The use of trained drug sniffing dogs is subject to the following:

1. The Superintendent shall contact the appropriate police authority who will conduct the search using a properly trained drug-sniffing dog (not a general police K9) handled by a specially trained officer. The Principal or his/her designee shall be present while the search is taking place.
2. Parents and students shall be notified of this policy through its inclusion in the student and/or parent handbook.
3. All school property such as lockers, classrooms, parking areas and storage areas may be searched.
 - a. Dogs shall not be used in rooms occupied by persons except for demonstration purposes with the handler present.
 - b. When used for demonstration purposes, the dog may not sniff the person or any individual.
4. Individual(s) shall not be subject to a search by dogs. **To avoid the potential of allergic reactions, dogs shall be kept away from the students.**
5. Once notification has been given to parents and students, through the inclusion of the policies in the student and/or parent handbook, the school district will have met its obligation to advertise the searches. Additional notices need not be given and actual times or dates of planned searches need not be released in advance.
6. Only the dog's official handler will determine what constitutes an alert by the dog. If the dog alerts on a particular item or place, the student having the use of the item or place or responsibility for it shall be called to witness the search. If a dog alerts on a locked vehicle, the driver shall be asked to unlock it for inspection.

Students

Use of Dogs to Search School Property

7. Law enforcement agencies will be given full authorization to investigate and prosecute any person(s) found to be responsible for illegal substance(s) on school property.

(c.f.5145.12 Search and Seizure)

Legal Reference: Connecticut General Statutes

10-221 Boards of education to prescribe rules.

New Jersey v. T.L.O., 53 U.S.L.W. 4083 (1985)

PA 94-115 An Act Concerning School Searches

Students

On-Campus Recruitment

Subject to the provisions of Subdivision (11) of Subsection (b) of Section 1-210 of the Connecticut General Statutes, the high schools of the school district shall provide the same directory information and on campus recruiting opportunities to representatives of the armed forces of the United States of America and State Armed Services as are offered to nonmilitary recruiters, recruiters for commercial concerns and recruiters representing institutions of higher education.

The Board of Education (Board) will inform, at the middle and high school level, students and parents/guardians of the availability of (1) vocational, technical and technological education and training at state technical high schools, and (2) agricultural sciences and technology education at public regional agricultural science and technology education centers.

The Board shall also provide full access for the recruitment of students by technical high schools, regional agricultural science and technology education centers, inter-district magnet schools, charter schools and inter-district student attendance programs, **provided such recruitment is not for the purpose of interscholastic athletic competition. The Board shall also post information about these school options on its website.**

Directory information or class lists of student names and/or addresses shall not be distributed without the consent of the parent or legal guardian of the student or by the student who has attained majority status.

Military recruiters or institutions of higher learning shall have access to secondary school students' names, addresses, and telephone listings unless the parent/guardian of such student submits a written request that such information not be released without their prior written consent. **A student, eighteen years of age or older, rather than his/her parent/guardian, may request in writing that such information not be released without his/her prior written permission.** The Board of Education shall notify parents/guardians and students of the option to make such request and shall comply with any request received.

The Every Student Succeeds Act (ESSA) requires the release of the student's name, address and telephone listing unless, after giving appropriate notice to parents/guardians and students 18 years of age or older, of their right to opt-out and to require, after such opt-out, written permission to release the information.

The school administrator may make the determination of when the recruitment meetings are to take place and reserves the right to deny such meeting where the holding of such meeting will materially and substantially interfere with the proper and orderly operation of the school.

Any person or organization denied the rights accorded under this policy shall have the right to request a review of the decision by the Board of Education by filing a written request with the Superintendent of Schools.

(cf. 5125 – Student Records; Confidentiality)

Legal Reference: Connecticut General Statutes

Policy Revised:

Amity Regional School District No. 5
Woodbridge, Connecticut

Students

On-Campus Recruitment

1-210 (11) Access to public records. Exempt records.

10-220d Student recruitment by a regional and interdistrict specialized schools and programs. Recruitment of athletes prohibited (as amended by P.A. 12-116, An Act Concerning Educational Reform)

10-221b Boards of education to establish written uniform policy re treatment of recruiters.(as amended by PA 98-252)

P.L. 106-398, 2000 H.R. 4205: The National Defense Authorization Act for Fiscal Year 2001

Section 8025 of Public Law 114-95, "The Every Student Succeeds Act of 2015"

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.

Students

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 engages all members of the school community and involves such members in a series of overlapping

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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 superintendent, shall serve

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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 school community.

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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
 - d. develop and sustain a restorative infrastructure that builds capacity, accountability, 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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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.

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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.*

Policy Approved:

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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 permit student use of personal electronic devices, including cell phones, for 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

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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

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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

jennifer.byars@amityregion5.org
203.392.2106

May 12, 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:
Connor Derry – F/T Social Studies Teacher – Connor completed his student teaching in the Groton Public School District where he also served as a building substitute. While pursuing his graduate studies, Connor served as an Instructional Paraprofessional providing individualized assistance to Special Education students. Connor earned a Bachelor's Degree from UConn majoring in Sports Management with a minor in Political Science and is also currently completing his coursework earning a Master's Degree in Curriculum and Instruction, also from University of Connecticut.
- Amity Regional Middle School – Bethany: **NONE**
- Amity Regional Middle School – Orange: **NONE**

+ NEW HIRES-BENCH/LONG TERM SUBSTITUTES/TUTORS: **NONE**

+ NEW HIRES-NON-CERTIFIED:

Chelsea Bereski – Category I Administrative Assistant – Amity Regional High School

+ NEW HIRES-COACHES: **NONE**

+ TRANSFERS:

Shaymaa Hassan – Full Time Paraprofessional in SAILS at Amity Middle School Orange to Part Time Paraprofessional in SAILS at Amity Middle School Orange, effective 04/21/2025

+ RESIGNATIONS:

Pamela Brownell – FT Chemistry Teacher ~ Amity Regional High School, eff. 6/12/2025
Robert Burns – Asst. Football Coach – 2025 Fall Season – Amity Reg. High School, eff 5/1/2025

+ RETIREMENTS: **NONE**