<u>PLEASE POST</u>

AMITY REGIONAL SCHOOL DISTRICT NO. 5

Bethany Orange Woodbridge 25 Newton Road, Woodbridge, Connecticut 06525

Dr. Jennifer P. Byars Superintendent of Schools

AMITY REGIONAL BOARD OF EDUCATION REGULAR MEETING AGENDA Monday, June 09, 2025 6:30 pm 25 Newton Road, Woodbridge, CT

Lecture Hall

- 1. CALL TO ORDER
- 2. PLEDGE OF ALLEGIANCE
- 3. APPROVAL OF MINUTES
 - a. Board of Education Regular Meeting May 12, 2025 page 4
- 4. RECOGNITION OF RETIREES, YEARS OF SERVICE, TEACHER OF THE YEAR AND AWARD OF EXCELLENCE
- 5. STUDENT REPORT
 - a. Monthly Report
- 6. PUBLIC COMMENT
- 7. CORRESPONDENCE
- 8. SUPERINTENDENT'S REPORT
 - a. Superintendent Report page 9
- 9. 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 14
 - 9. Facilities
 - a. Monthly Report page 15
 - 10. Finance
 - a. Discussion and Possible Action on Contracts over \$35,000 page 16
 - i. Bell, Announcement and Security Alert Systems
 - b. Discussion of Monthly Financial Statements page 17
 - c. Director of Finance and Administration Approved Transfers Under \$3,000 page 48
 - d. Discussion and Possible Action on Budget Transfers of \$3,000 or More FY25 and FY26
 page 51
 - e. Other
- i. Special Education Update
- ii. School Lunch

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- 11. **Policy**
 - a. Second Reads
 - Policy 5131.81 Cell Phones and other Personal Electronic Devices page 54
- 12. Personnel
 - a. Personnel Report page 58
- 13. Discussion of Non-Union Salary Proposals for 2025-2026 Fiscal Year (Anticipated Executive Session)
- 14. Discussion of Standard Benefits Package for 2025-2026 (Anticipated Executive Session)
- 15. Discussion of Non-Union Administrator Contracts for 2025-2028 (Anticipated Executive Session)
- 16. Possible Action on Non-Union Salary Proposals for 2025-2026 Fiscal Year
- 17. Possible Action on Standard Benefits Package for 2025-2026
- 18. Possible Action on Non-Union Administrator Contracts for 2025-2028
- 19. Updates on Amity Administrators' Group (AAG) Contract Negotiations
- 10. NEW BUSINESS & ANNOUNCEMENTS
 - a. Special Board of Education Meeting June 23, 2025
- 11. ITEMS FOR THE NEXT REGULAR MEETING AGENDA Due to Chairperson by July 30, 2025
- 12. 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 REGULAR MEETING MINUTES

Monday, May 12, 2025 6:30 pm 25 Newton Road, Woodbridge, CT Lecture Hall

BOARD MEMBERS PRESENT

Paul Davis, Sean Hartshorn, Andrea Hubbard, Christina Levere-D'Addio, Dana Lombardi, Dr. Carol Oladele, Donna Schlank and Donna Schuster* arrived at 6:36

BOARD MEMBERS ABSENT

Bradley, Eichler, Dr. Karunakaran, McDonough, Reed

STUDENT BOARD MEMBERS

Both Absent

STAFF MEMBERS PRESENT

Dr. Jennifer Byars, Theresa Lumas

1. CALL TO ORDER

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

2. PLEDGE OF ALLEGIANCE

Led by Amity Board of Education Chair Paul Davis

3. APPROVAL OF MINUTES

Board of Education Special Meeting – April 28, 2025

MOTION by Andrea Hubbard, SECOND by Sean Hartshorn to approve April 28, 2025 minutes with suggested edits.

VOTES IN FAVOR, 3 (Hubbard, Levere-D'Addio, Dr. Oladele)

ABSTAIN, 4 (Davis, Hartshorn, Lombardi, Schlank)

MOTION CARRIES

b. Region District #5 Annual Meeting – May 5, 2025

MOTION by Sean Hartshorn, SECOND by Andrea Hubbard to approve May 5, 2025 minutes with suggested edits.

VOTES IN FAVOR, 5 (Davis, Hartshorn, Hubbard, Levere-D'Addio, Lombardi)

ABSTAIN, 2 (Dr. Oladele, Schlank)

MOTION CARRIES

4. STUDENT REPORT

a. None

5. RECOGNITION OF CABE AWARD RECIPIENTS

Presented by Amity Region 5 AMSB Principal Dr. Tracy, Amity Region 5 AMSO Principal Kathy Burke and Amity Region 5 High School Mr. Andre Hauser

6. RECOGNITION OF NHSCA ALL-AMERICAN WRESTLER

Presented by Amity Region 5 Athletic Director Ernest Goodwin

Chairperson Davis called a short recess from 6:48 p.m. - 6:52 p.m. to allow parents and students to take pictures and exit.

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

Presented by Christopher Kachmar from Fiducient Advisors

8. PUBLIC COMMENT

None

9. SUPERINTENDENT'S REPORT

- a. Superintendent Report
- b. Acknowledgement of SCASA Award Recipients

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

10. CORRESPONDENCE

11. CHAIRMAN'S REPORT

- a. Committee Reports
 - 1. ACES
 - 2. Ad-Hoc School Start Times
 - CABE
 - 4. Communications
 - 5. **Curriculum**
 - 6. **District Health and Safety**
 - 7. Diversity, Equity, and Inclusion Executive Committee
 - 8. **District Technology**
 - a. Monthly Report
 - 9. **Facilities**
 - a. Monthly Report
 - 10. Finance
 - a. Discussion and Possible Action on Virtual Net Metering Program

MOTION by Sean Hartshorn SECOND by Donna Schlank to authorize the Superintendent to enter into an agreement for the Virtual Net Metering program.

VOTES IN FAVOR, 5 (Davis, Hartshorn, Hubbard, Levere-D'Addio, Schlank)

VOTES OPPOSED, 1 (Lombardi)

ABSTAIN, 2 (Oladele, Schuster)

MOTION CARRIES

b. Discussion and Possible Action on Contracts over \$35,000

i. Renewal of Food Service Management Contract

MOTION by Sean Hartshorn SECOND by Donna Schlank to 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.

VOTES IN FAVOR, 8 (UNANIMOUS)

MOTION CARRIES

ii. Workers' Compensation Insurance and Liability, Auto & Property Insurance

MOTION by Sean Hartshorn SECOND by Donna Schlank to 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.

VOTES IN FAVOR, 8 (UNANIMOUS)
MOTION CARRIES

iii. Student Accident Insurance

MOTION by Sean Hartshorn SECOND by Dr. Oladele 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.

VOTES IN FAVOR, 8 (UNANIMOUS)
MOTION CARRIES

iv. Sanding and Snow Removal

MOTION by Donna Schuster SECOND by Dana Lombardi to approve 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.

VOTES IN FAVOR, 8 (UNANIMOUS)

MOTION CARRIES

v. Groundskeeping

MOTION by Christina Levere-D'Addio SECOND by Dana Lombardi 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.

VOTES IN FAVOR, 7 (Davis, Hartshorn, Hubbard, Levere-D'Addio, Lombardi, Schlank, Schuster)

ABSATIN, 1 (Dr. Oladele)

MOTION CARRIES

c. Discussion and Possible Action on Tuition Rate for 2025-2026

MOTION by Dr. Carol Oladele SECOND by Sean Hartshorn to approve the non-resident tuition rate for 2025-2026 school year at \$22,442.00; and the non-resident Special Education base tuition rate for 2025-2026 school year at \$23,240.00 plus any additional services.

VOTES IN FAVOR, 8 (UNANIMOUS)

MOTION CARRIES

d. Discussion of Monthly Financial Statements

Presented by Amity Region 5 Director of Finance Theresa Lumas

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

Presented by Amity Region 5 Director of Finance Theresa Lumas

f. Discussion and Possible Action on Budget Transfers of \$3,000 or More

MOTION by Andrea Hubbard, SECOND by Sean Hartshorn to approve the following budget transfers:

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

For administrator laptops:

FACILITY	ORG	OBJ	ACCOUNT DESCRIPTION	FROM	ТО
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

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

VOTES IN FAVOR, 8 (UNANIMOUS) MOTION CARRIES

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

MOTION by Dana Lombardi SECOND by Donna Schlank 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.

VOTES IN FAVOR, 8 (UNANIMOUS)
MOTION CARRIES

11. Policy

- a. First Reads
 - i. Policy 5145.12 Search and Seizure
 - ii. Policy 5145.122 Use of Dogs to Search School Property
 - iii. Policy 5145.14 On Campus Recruitment
- b. Second Reads
 - i. Policy 5131.911 Connecticut School Climate Policy

MOTION by Christina Levere-D'Addio, SECOND by Donna Schuster to approve Policy 5131.911 Connecticut School Climate Policy.

VOTES IN FAVOR, 8 (UNANIMOUS)

MOTION CARRIES

ii. Policy 5131.81 Cell Phones and other Personal Electronic Devices Policy 5131.911 Connecticut School Climate Policy will return to the Policy Committee for further discussion.

12. Personnel

a. Personnel Report

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

- 12. NEW BUSINESS & ANNOUNCEMENTS
- 13. ITEMS FOR THE NEXT REGULAR MEETING AGENDA Due to Chairperson by May 30, 2025
- 14. ADJOURNMENT

Chairperson Davis adjourned the meeting, without objection, at 8:31 p.m.

Respectfully submitted,

Lisa Zaleski

Lisa Zaleski

BOE Recording Secretary

AMITY REGIONAL SCHOOL DISTRICT NO. 5

Bethany Orange Woodbridge 25 Newton Road, Woodbridge, Connecticut 06525



Dr. Jennifer P. Byars Superintendent of Schools

jennifer.byars@amityregion5.org 203.392.2106

Superintendent's Report – June 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.

CONGRATULATIONS TO THE CLASS OF 2025!

Instruction

Graduation: The Commencement Ceremony for the 319 members of the Class of 2025 will take place on Tuesday, June 10, 2025 at 4:00 p.m.

Stepping Up: AMSO and AMSB will hold their Stepping-Up Ceremonies on Wednesday, June 11, 2025 at 9:00 a.m. These annual events celebrate the 8th grade transition to 9th grade and feature guest speakers, student speakers and performances, photographs, videos, awards, and the presentation of certificates to each student.

AP Testing Completed: Advanced Placement Course testing took place throughout the first two weeks of May. Throughout the two weeks of exams, ARHS had 377 different students take a total of 798 AP exams across 32 subjects.

Finals Week: Final Exams for all students in Grades 9 - 11 will take place from June 5, 2025 through June 11, 2025.

PTSO Teacher of the Year: Mandarin Teacher and World Language Department Chair Xia Feng was honored as the Amity Regional High School 2025 PTSO Teacher of the Year at the Senior Awards Night ceremony on May 29, 2025.

Gold Pen Award Ceremony: The district held its annual Gold Pen Award Ceremony on May 22, 2025. Teachers selected for the Gold Pen Award are chosen by their colleagues for their significant contributions to the Amity school community. Families of the winners and teachers from each of the schools were invited to the high school to join in the celebration of the award winners. This year's winners were Tom Ward from AMSB, John Simone from AMSO, and LeeAnn Browett from ARHS.

Alternative Energy Vehicle Race: In just their second year of competition, the ARHS CTE Department entered two cars in the 29th Alternative Energy Vehicle Race competition on May 23, 2025, placing 1st and 3rd in the competition against much more seasoned teams from other Connecticut high schools.

Curriculum Writing: As the school year comes to a close, many departments have begun the process of curriculum writing, which will continue throughout the summer. Teams from World Language, Math, Social Studies, Science, English, Career and Technical Education (CTE), and Visual and Performing Arts

(VPA) will be engaged in this work. Curriculum writing will take place for more than 24 courses over the summer. The Board of Education can expect a group of these revised or newly developed courses to be presented for approval in the fall.

Portrait of the Graduate: There will be focused work over the summer in preparation for the continued implementation of the Portrait of the Graduate (POG) in our schools. We will continue to support teachers and students in bringing the POG to life in our classrooms. Our work with teachers is centered on how to embed the POG characteristics into instructional planning and practice.

National English Honor Society Induction: Thirty-four new members were inducted into Amity's chapter of the National English Honor Society on May 21, 2025. This charter carries with it a commitment to the mission of the founders of the Society: to promote mastery of written expression, encourage worthwhile reading, and foster fellowship among students who excel in English studies.

Seal of Biliteracy: The Seal of Biliteracy has been submitted for the 14 students who achieved a passing score on the appropriate test.

Perfect Score: Congratulations to 10th grade student Carys Campos, who earned a perfect score on the recent National Spanish Exam! This is an almost unheard-of accomplishment, and Carys is the first Amity student to earn a perfect score on this exam in as long as we have been keeping records of it.

Middle School Schedule Redesign: As part of our continued work on a potential redesign of the middle school schedule, we administered short surveys to students, staff, and families in May and early June. The student surveys were conducted in both middle schools this week. We are now in the process of analyzing feedback to identify common themes and key insights. This input from all stakeholder groups will be instrumental in shaping a schedule that enhances educational opportunities and better supports the needs of our students.

ATA Graduation: Amity Transition Academy celebrated 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.

SBA Wraps Up End of Standardized Testing: The month of May held several sessions of standardized testing with the middle schools closing it with the Smarter Balanced Assessment (SBA) in English and Math. We thank the teachers for proctoring and adjusting to different testing schedules and the PTSOs who supported the students with snacks.

AMSB 8th Grade New Haven Trip: The 8th grade students from AMSB spent the day in New Haven, visiting the Yale Museum of British Art, taking a walking tour of downtown, and dining at a New Haven restaurant.

Successful Growing Season!: The AMSO Farm and Garden Club ended a very successful growing season. Students did an outstanding job planting bulbs, pruning shrubs and adding a decorative border to the courtyard garden. In addition, the club sold a variety of home-grown vegetables and flower plants to community members and staff.

Salsa Workshops at AMSO: AMSO 7th grade students participated in vibrant salsa dancing workshops sponsored by the Jamie Hulley Arts Foundation. Students worked with Willie Rios, an experienced salsa dance teacher learning dance steps that got the entire group moving. William Mendoza, Director of The Latin Heartbeat Orchestra and Abreu Latin Jazz, provided the soundtrack for an exciting dance performance by several students and staff.

Visit with High School Counselors: ARHS counseling staff will visit 8th grade students at both middle schools during the month of June. This is the first chance for our 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 4 years.

Data Team Analysis: The District Data Team conducted an initial analysis of the Grade 11 SAT results and preliminary NGSS scores. Additionally, the team reviewed early SBA and NGSS data from the middle schools. This review highlighted both areas of strength and opportunities for growth. Based on these findings, the team identified key next steps to guide our continued improvement efforts in the 2025–2026 school year.

Scheduling Update: Limited high school schedules—showing only the courses (not teacher or period assignments)—will be released today or tomorrow. These preliminary schedules allow students to review their course selections and report any potential errors. At the middle school level, scheduling work is progressing steadily. Master schedules have been built, and teams are in the process of reviewing student schedules. Some minor delays have occurred due to routine transitions and data updates, but overall progress remains on track for release of schedules this summer!

Resources

Conservationist of the Year!: Congratulations to ARHS Science teacher Ai Beres-Nork, who was named Bethany's Conservationist of the Year at their annual town meeting on May 19, 2025.

STEAM Day: 375 5th Grade students from Bethany, Orange, and Woodbridge were invited to the high school on May 29, 2025 for the annual STEAM Day event. Over 100 ARHS Students and 30 staff from the high and middle schools held demonstrations in various locations to showcase the interesting and exciting opportunities in STEAM elementary students will have in the future at Amity High School. Feedback from the BOW schools was extremely positive. High school teachers, Angelo Amato and Jessica Zamachaj, were responsible for organizing this wonderful event.

Middle School Marching Bands: Congratulations to the **AMSO Marching Band** for their outstanding performance at the Orange Memorial Day Parade. Over 30 students marched in the parade and were proud to showcase their talent for the community. Congratulations to the **AMSB Marching Band** for their outstanding performance at the Bethany Memorial Day Parade.

Extended School Year Preparations: Amity staff have been working with our colleagues in the BOW to prepare for Extended School Year (ESY) services for special education students. ESY begins July 7, 2025 and runs until August 1, 2025. This year, ESY services will take place at either Amity Middle School Orange or at ARHS, depending on the recommended services.

CHDI Institute Training: Bibi John, School Psychologist at ARHS, attended the 16th Annual Evidence-Based Practice Conference hosted by the Connecticut Health and Development Institute (CHDI). This year's conference, themed "Cultivating Connections and Equity in Connecticut's Behavioral Health System," brought together over 460 behavioral health providers, school professionals, state agency staff, and others working with CHDI and the State of Connecticut to strengthen children's behavioral health evidenced based practices.

Climate

Healthy Safety and Wellness Committee Meeting: The Health, Safety, and Wellness Committee convened to review updates from district departments and to discuss the district's progress in key areas impacting student and staff well-being. The committee also reviewed the **Wellness Triennial**

Assessment, a requirement every three years. Amity's scores showed measurable improvement since the last review in 2022:

- Comprehensive Score increased from 85% (2022) to 93% (2025) (+8 points)
- Strength Score increased from 66% (2022) to 79% (2025) (+13 points)

These gains reflect enhanced clarity and strength in the wellness policy language and implementation.

Saying Goodbye to the Class of 2025: Senior Events worth noting in the past month included:

- Seniors took part in either off-campus UELP internships, on-campus Student Interest Projects, or the Senior Summit program from May 12, 2025 through May 29, 2025. Seniors presented their independent projects to 9th, 10th, and 11th grade students through a special Spartan Seminar on June 3, 2025.
- Congratulations to the 170 Seniors who were honored with awards and scholarships at the Senior Awards Night ceremony on May 29, 2025!
- The Senior Prom took place on May 30, 2025.
- Senior yearbooks, the class gift, and caps and gowns were all distributed at a ceremony following the internship presentations on June 3, 2025.
- The Senior Class Picnic to Lake Compounce was June 6, 2025.
- Senior Sunset will be celebrated on June 8, 2025
- The ARHS PTSO hosts their annual Senior breakfast for the class prior to Graduation rehearsal on June 9, 2025.

Adult Education Graduation: One Amity student was awarded their high school diplomas through the Adult Education Program at Hamden High School. A graduation ceremony was held on the evening of May 22, 2025, at Hamden High School. A reception was held immediately afterwards for friends and family members to celebrate the student's accomplishments.

Underclass Awards Night: ARHS celebrated our annual Underclass Awards Ceremony on May 22, 2025 during which we honored several students in Grades 9 - 11 for excellence and achievement in all aspects of school life. Congratulations to all our award winners!

Girls' SCC Lacrosse Champions: Congratulations to the Girls Lacrosse team for their 2025 SCC conference championship title!

Athletics Senior Days: Congratulations to all our Senior student-athletes and thank you for the good sportsmanship and leadership you have all provided for our many sports teams this season! Senior Day events were held for spring sports on the following dates:

- Boys Volleyball: May 12, 2025
- Boys & Girls Track & Field: May 13, 2025
- Girls Tennis: May 14, 2025
- Baseball: May 15, 2025
- Softball: May 16, 2025
- Girls Lacrosse: May 19, 2025
- Boys Tennis: May 21, 2025
- Boys Golf: May 21, 2025
- Boys Lacrosse: May 23, 2025

SADD Talent Show: Students Against Destructive Decisions (SADD) hosted their annual Amity's Got Talent show on May 15, 2025.

AMSB 6th **Grade Field Day:** On May 27, 2025, future Spartans visited AMSB and held their annual field day. After a brief presentation from the administration and reading staff, the students spent the day getting acquainted with their soon-to-be classmates and had wonderful weather for the day.

Welcoming New 7th Grade Students: On May 30, 2025, AMSO students and staff welcomed the incoming 7th grade from the Orange elementary schools. AMSO students gave the incoming class a tour of the building and shared important information regarding the transition to middle school. Following the tour, a panel of 7th grade students met with the incoming 7th grade students to answer questions and give advice regarding how to succeed in middle school.

AMSB 8th Grade Holiday Hill: Also on May 27, 2025, the 8th grade from AMSB attended the annual trip to Holiday Hill. The students enjoyed a day of sports, hiking, swimming, canoeing, and had more food and treats than they could consume. This was a great way to celebrate the end of middle school.

AMSB 7th **Grade Field Day:** On May 30, 2025 AMSB held the annual 7th grade field day. The students all participated in friendly competition supported by the ARHS Link Crew students, their high school advisors, our amazing 7th grade teachers, and many parent volunteers. Thanks to the PTSO for the snacks.

ATA Gathering: Mrs. Benton and her group of 8th grade helpers held the 3rd Annual Amity Transition Academy friendship gathering at AMSB. The students from ATA joined students at AMSB for some fun games, a digital media lesson, and a wonderful lunch. The day was full of smiles and gratitude as we celebrated the ATA graduates and our kinship.

Calliope: The 2025 edition of *Calliope*, the Amity art and literary magazine, has been published and it is full of student short fiction, poetry, photography, and illustration. You can access an online copy of *Calliope* here: https://tinyurl.com/AmityCalliope25.

May Ticket Summary

Tickets addressed and closed: 276

Tickets open: 12

HS Student Help Desk

Students helped: 294

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:

- Senior devices have been collected
- Student and teacher devices for next year have been selected and ordered
- Student helpers have been identified for summer work, they will begin working as summer helpers the Monday following graduation
- Website redesign and major updates have been completed

Projects in process:

- Preparing for student device collection at all three schools, excluding the senior class, starting Tuesday June 10, 2025
- Preparing plans for summer updates and refresh projects
- Preparing for technology inventory this summer
- Identifying locations for Promethean board replacements that will be installed over the summer
- 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
- Continue 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.



June 2025

CLEAN

SAFE

HEALTHY

SCHOOLS

Amity Regional School District No. 5

Facilities Department Monthly Report

Completed Projects:

- A mop sink was replaced and the drain was repaired by our in house building maintainer.
- A toilet flush handle was repired at AMSO by our in house building maintainer.
- Various condensation leaks were repaired by our in house HVAC maintainer.
- An outdoor temperature sensor at AMSB was replaced by an outside contractor.
- A second convection oven in the kitchen at AMSB was repaired by an outside vendor.
- A faucet for a sink in the boys bathroom at AMSO was replaced by our in house maintainer at AMSO.
- An exhaust fan on the roof at ARHS was replaced by our in house HVAC maintainer.

Projects in Process:

- The District is working with the Town of Woodbridge to address concerns with the fuel cell and micro-grid. A meeting with all parties to discuss the plan and future operations occurred on June 2, 2025.
- Titan Energy has informed the district that we have been approved for the solar canopy project. The project is scheduled for the summer of 2026.
- 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. Preliminary drawings were sent over for review, final drawings will be ready early June
- 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 the July 1st kickoff.

Outstanding issues to be addressed:

Amity Regional School District No. 5

25 Newton Road

Woodbridge, CT 06525 Phone: 203-397-4817

Fax: 203-397-4864



AMITY REGIONAL SCHOOL DISTRICT NO. 5

Bethany Orange Woodbridge 25 Newton Road, Woodbridge Connecticut 06525



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

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

To: Dr. Jennifer Byars, Superintendent of Schools

From: Theresa Lumas, Director of Finance and Administration

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

Date: June 2, 2025, 2025

Facilities:

1. School Intercom, Bell and Security System:

Mr. Martoni and Mr. DeRosa are recommending awarding the contract for equipment including installation of a bell, paging, and lockdown system at each middle school. Eastern Datacomm is a vendor from the PEPPM technology cooperative purchasing program. References were checked and a site visit conducted at another school which installed this system from Eastern Datacomm. The contract price for both middle schools is \$199,777. The budgeted price was \$100,000 for each school. There is a transfer requested this month to move \$13,406 from AMSB to AMSO. The configuration at AMSO is higher to address the lack of visibility of the school building from the field and to install a remote notification system.

Amity Finance Committee

Move to recommend the Board award ...

Amity Board of Education

Move to award...

.... the bell, paging, and lockdown equipment and notification to Eastern Datacomm for \$199,777 total for both middle school systems.

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2023-2024	2024-2025	APR 25	CHANGE	MAY 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	12,955	306,400	58,855	FAV
3	OTHER STATE GRANTS	839,037	922,082	822,233	168,904	991,137	69,055	FAV
4	MISCELLANEOUS INCOME	15,385	15,000	20,000	0	20,000	5,000	FAV
5	TOTAL REVENUES	54,612,413	56,456,652	56,407,703	181,859	56,589,562	132,910	FAV
6	SALARIES	29,108,667	31,251,456	30,904,509	(28,357)	30,876,152	(375,304)	FAV
7	BENEFITS	5,796,459	6,828,489	6,806,931	(42,611)	6,764,320	(64,169)	FAV
8	PURCHASED SERVICES	9,433,792	10,242,333	9,961,625	(136,814)	9,824,811	(417,522)	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	3,588,857	7,000	3,595,857	136,473	UNF
11	EQUIPMENT	169,506	200,101	226,512	7,500	234,012	33,911	UNF
12	IMPROVEMENTS / CONTINGENCY	272,756	392,500	232,500	(14,500)	218,000	(174,500)	FAV
13	DUES AND FEES	169,465	224,178	200,178	0	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	55,779,323	(207,782)	55,571,541	(885,111)	FAV
16	SUBTOTAL	991,268	0	628,380	389,641	1,018,021	1,018,021	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	628,380	389,641	1,018,021	1,018,021	FAV

Column 7: FAV=Favorable Variance

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2023-2024	2024-2025	APR 25	CHANGE	MAY 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	WOODBRIDGE 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	(1,766)	26,234	(1,766)	UNF
6	INVESTMENT INCOME	151,963	60,000	110,000	15,000	125,000	65,000	FAV
7	PARKING INCOME	32,019	31,150	31,150	(279)	30,871	(279)	UNF
		00.007	0.5.000	40.705		40 707	(44.005)	
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	12,955	306,400	58,855	FAV
12	ADULT EDUCATION	4,521	4,754	5,178	0	5,178	424	FAV
14	SPECIAL EDUCATION GRANTS	812,416	893,928	794,955	168,904	963,859	69,931	FAV
15	TRANSPORTATION INCOME-MAGNET	22,100	23,400	22,100	0	22,100	(1,300)	UNF
16	OTHER STATE GRANTS	839,037	922,082	822,233	168,904	991,137	69,055	FAV
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	56,407,703	181,859	56,589,562	132,910	FAV

Column 7: FAV=Favorable Variance

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2023-2024	2024-2025	APR 25	CHANGE	MAY 25	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
1	5111-CERTIFIED SALARIES	23,917,065	25,596,300	25,424,281	(30,510)	25,393,771	(202,529)	FAV
2	5112-CLASSIFIED SALARIES	5,191,602	5,655,156	5,480,228	2,153	5,482,381	(172,775)	FAV
3	SALARIES	29,108,667	31,251,456	30,904,509	(28,357)	30,876,152	(375,304)	FAV
4	5200-MEDICARE - ER	407,317	455,244	455,244	(15,000)	440,244	(15,000)	FAV
5	5210-FICA - ER	337,860	360,217	360,217	(12,000)	348,217	(12,000)	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	(15,000)	49,396	(15,000)	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	18,000	215,327	18,000	UNF
13	5282-RETIREMENT SICK LEAVE - CERT	0	0	0	0	0	0	FAV
14	5283-RETIREMENT SICK LEAVE - CLASS	0	0	0	0	0	0	FAV
15	5284-SEVERANCE PAY - CERTIFIED	0	0	0	0	0	0	FAV
16	5290-UNEMPLOYMENT COMPENSATION	36,600	7,590	18,760	(6,011)	12,749	5,159	UNF
17	5291-CLOTHING ALLOWANCE	1,891	2,200	2,200	(600)	1,600	(600)	FAV
18	5292-TUITION REIMBURSEMENT	0	27,000	27,000	(12,000)	15,000	(12,000)	FAV
19	BENEFITS	5,796,459	6,828,489	6,806,931	(42,611)	6,764,320	(64,169)	FAV
20	5322-INSTRUCTIONAL PROG IMPROVEMENT	61,690	64,200	79,580	6,300	85,880	21,680	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	2,306,124	0	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	3,964,411	2,542	3,966,953	(53,553)	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	101,390	0	101,390	(13,686)	FAV
27	5560-TUITION EXPENSE	2,712,997	3,093,272	2,854,142	(145,656)	2,708,486	(384,786)	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	9,961,625	(136,814)	9,824,811	(417,522)	FAV

Column 7: FAV=Favorable Variance

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2023-2024	2024-2025	APR 25	CHANGE	MAY 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
	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	7,000	828,590	26,285	UNF
35	5611-INSTRUCTIONAL SUPPLIES	371,596	444,802	392,422	0	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	73,930	0	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	149,281	0	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	246,516	0	246,516	(10,780)	FAV
43	5695-OTHER SUPPLIES-TECHNOLOGY	434,917	456,945	437,594	0	437,594	(19,351)	FAV
44	SUPPLIES (INCLUDING UTILITIES)	3,161,505	3,459,384	3,588,857	7,000	3,595,857	136,473	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	172,211	7,500	179,711	33,911	UNF
49	EQUIPMENT	169,506	200,101	226,512	7,500	234,012	33,911	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)	(14,500)	(74,500)	(74,500)	FAV
54	IMPROVEMENTS / CONTINGENCY	272,756	392,500	232,500	(14,500)	218,000	(174,500)	FAV

Column 7: FAV=Favorable Variance

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2023-2024	2024-2025	APR 25	CHANGE	MAY 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	76,855	0	76,855	(10,000)	FAV
57	5810-DUES & FEES	90,504	111,435	97,435	0	97,435	(14,000)	FAV
58	DUES AND FEES	169,465	224,178	200,178	0	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	55,779,323	(207,782)	55,571,541	(885,111)	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



May 2025

2024-2025 FORECAST

OVERVIEW

The projected unspent fund balance for this fiscal year is \$1,018,021 FAV, previously \$628,380 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 will be requested at the September 2025 meeting.

REVENUES BY CATEGORY

The projected yearend balance of revenues is \$132,910 FAV, previously \$48,949, 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* \$1,766 UNF, previously neutral.

LINE 6 on Page 2: INVESTMENT INCOME:

The forecast is based on the budget developed. *The forecast is \$65,000 FAV, previously \$50,000 FAV.*

		State Treasurer's
Month	M&T Bank	Investment Fund
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%
May	.40%	4.39%

LINE 7 on Page 2: PARKING INCOME:

The forecast is based on the budget developed on actual payments. *The forecast is \$279 UNF*, *previously 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 \$69,931 FAV, previously \$98,973 UNF with the latest State reimbursement estimates projected based on the latest expenditure data report to the State and the historical low reimbursement rate of 60% plus a one-time appropriation expected in late June. The one-time appropriation is \$168,904. Our regular payments this year were reimbursed at 59.96%.

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 \$885,111 FAV, previously \$677,329 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* \$202,529 FAV, previously \$172,019 UNF. The estimate for substitute cost 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 is \$13,000 FAV less spent on curriculum writing and a transfer was approved in May. Some salaries were covered by the Title grant instead of professional development. Another transfer is requested this month for professional development services not covered by the grant.

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 \$172,775 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 estimated to be \$27,000 FAV, previously neutral. This is due to staff vacancies, unpaid leaves and turnover in positions resulting in less taxes due.

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 101.7% 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

	2	2024-2025	2024-2025			2	023-2024	2	2022-2023
MONTH	A	ACTUAL	BUDGET	VA	ARIANCE	A	ACTUAL	A	ACTUAL
JUL*	\$\$	347,337	\$ 370,320	\$	(22,983)	\$	364,829	\$	34,837
AUG	\$ \$	488,825	\$ 517,730	\$	(28,905)	\$	641,037	\$	798,616
SEP	\$\$	404,062	\$ 475,645	\$	(71,583)	\$	412,377	\$	551,212
OCT	\$	549,988	\$ 390,384	\$	159,604	\$	508,930	\$	297,594
NOV	\$\$	458,288	\$ 457,220	\$	1,068	\$	541,882	\$	306,068
DEC	\$	477,519	\$ 607,753	\$	(130,234)	\$	363,042	\$	435,108
JAN	\$	328,754	\$ 391,200	\$	(62,446)	\$	220,714	\$	311,328
FEB	\$	382,582	\$ 283,638	\$	98,944	\$	183,906	\$	190,062
MAR	\$	303,213	\$ 368,489	\$	(65,276)	\$	261,829	\$	313,582
APR	\$	401,225	\$ 332,509	\$	68,716	\$	266,018	\$	222,547
MA Y	\$	486,801	\$ 348,408	\$	138,393	\$	456,890	\$	486,004
JUN	\$	348,237	\$ 348,237	\$	-	\$	369,321	\$	302,891
TOTALS	\$	4,976,831	\$ 4,891,532	\$	85,299	\$	4,590,775	\$	4,249,849

ACTUAL/FORECAST CLAIMS AS A PERCENTAGE OF EXPECTED CLAIMS

2020-2021	2021-2022	2022-2023	2023-2024	2024-2025
ACTUAL	ACTUAL	ACTUAL	ACTUAL	FORECAST
75.8%	97.3%	93.6%	99.5%	101.7%

^{*}Incomplete billing cycle in July 2023

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

	20	2024-2025		2024-2025			2023-2024		2022-2023	
MONTH	A	CTUAL	В	BUDGET		ARIANCE	\boldsymbol{A}	CTUAL	\boldsymbol{A}	CTUAL
JUL	\$	50,798	\$	37,888	\$	12,910	\$	44,555	\$	30
AUG	\$	54,969	\$	63,533	\$	(8,564)	\$	54,176	\$	83,030
SEP	\$	14,743	\$	52,368	\$	(37,625)	\$	53,028	\$	61,858
OCT	\$	53,552	\$	54,324	\$	(772)	\$	52,666	\$	47,063
NOV	\$	53,061	\$	53,324	\$	(263)	\$	53,732	\$	50,445
DEC	\$	51,875	\$	56,241	\$	(4,366)	\$	53,218	\$	52,888
JAN	\$	(6,882)	\$	45,676	\$	(52,558)	\$	48,165	\$	25,978
FEB	\$	82,020	\$	66,557	\$	15,463	\$	57,785	\$	46,388
MAR	\$	(10,286)	\$	55,147	\$	(65,433)	\$	(8,744)	\$	74,389
APR	\$	55,644	\$	50,345	\$	5,299	\$	46,575	\$	43,145
MA Y	\$	55,040	\$	54,104	\$	936	\$	41,342	\$	47,499
JUN	\$	44,360	\$	44,360	\$	-	\$	(6,272)	\$	18,816
TOTALS	\$	498,894	\$	633,867	\$	(134,973)	\$	490,226	\$	551,529

LINE 9 on Page 3: 5260-LIFE INSURANCE:

The forecast is estimated to be \$15,000 FAV, previously neutral. There is a budget reduction in this account next year.

LINE 10 on Page 3: 5275-DISABILITY INSURANCE:

The forecast is based on budget.

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

The forecast is based on actual costs and estimated to be \$18,000 UNF, previously neutral.

LINE 16 on Page 3: 5290-UNEMPLOYMENT:

The forecast is based on the first 3 quarters billing, \$5,159 UNF, previously \$11,170 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 \$21,680 UNF, previously \$15,380 UNF. A transfer is requested this month for professional learning.

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 \$7,992 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 \$53,553 FAV, previously \$56,095 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 \$13,686 FAV with e-rate credits for the CEN, previously neutral.

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 \$384,786 FAV, previously \$239,130 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	4
Trumbull	3	1	3	4	4	3
Nonnewaug	7	9	7	8	8	4
Emmett						
O'Brien	0	0	2	2	2	(0)2
Common						
Ground						
Charter HS	1	1	3	2	1	0
Fairchild						
Wheeler	0	0	0	0	0	1
NH Coop						
Arts	0	0	0	0	0	1
Wintergreen						
Magnet						
	0	1	0	0	0	0
Marine						
Science						
Magnet HS	0	0	1	0	0	0
Engineering						
Science	_	_	_	_	_	_
Magnet	0	0	0	0	0	1
Lyman						_
Hall-Vo-	0	0	0	0	0	1
AG School						
Totals	16	15	20	17	18	<i>15(17)</i>

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

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

Public (ACES) and private out-of-district placements are \$167,088 FAV, previously \$79,308 FAV.

FY20-21	FY21-22	FY22-23	FY23-24	FY24-25	FY24-25
ACTUAL	ACTUAL	ACTUAL	ACTUAL	BUDGET	FORECAST

Public SPED	6	10	9	8	11	9
Private						
SPED	27	20	16	19	16	15
Totals	33	30	25	27	27	24(24)

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

The 2024-2025 budget for electricity assumes the use of 3,377,000 kilowatt hours at an average price of 0.07988 or a cost of \$620,567 with delivery charges. Forecast is \$208,109 UNF due to higher demand, delivery and public benefit charges, previously \$208,109 UNF. It is difficult to estimate the supplemental charges and current rates project a \$167,000 UNF effect on the account. A budget transfer was approved in May 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
JUL	352,636	307,438	45,198	275,363	325,263
AUG	341,068	339,080	1,988	339,333	350,459
SEP	315,393	304,849	10,544	295,827	294,292
OCT	302,667	278,181	24,486	250,944	252,949
NOV	264,619	261,922	2,697	251,734	252,160
DEC	259,154	259,642	(488)	233,988	245,784
J AN	292,535	275,541	16,994	271,629	262,051
FEB	268,168	270,438	(2,270)	255,916	259,362
MAR	263,087	255,558	7,529	242,795	249,254
APR	290,631	264,677	25,954	262,074	250,112
MAY	257,500	257,500	-	288,966	264,292
JUN	302,174	302,174	-	320,107	287,285
Totals	3,509,632	3,377,000	132,632	3,288,676	3,293,263

DEGREE DAYS

There are 5,084 degree days to date as opposed to 3,904 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. A transfer is requested this month from contingency for a curb replacement which has disintegrated, \$7,000 UNF.

<u>LINE 35 on Page 4: 5611-INSTRUCTIONAL SUPPLIES:</u> The forecast is projected to be \$52,380 FAV, previously \$52,380 FAV.

<u>LINE 36 on Page 4: 5613-MAINTENANCE SUPPLIES:</u> 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 \$2,000 FAV.* A transfer was approved in May 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 \$29,000 FAV. 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 \$10,780 FAV.

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

The forecast is projected to be \$19,351 FAV, previously \$19,351 FAV. A transfer was approved in May 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-EOUIPMENT -TECHNOLOGY-REPLACEMENT:

The forecast is projected to be \$26,411 UNF, previously \$26,411 UNF. A transfer was approved in October to cover the purchase of an additional 20 teacher devices (40 in total). A transfer was approved in May 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. There are two transfers requested this month emergency repairs to a curb \$7,000 UNF and replacement of kiln, \$7,500 UNF.

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

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

<u>\$21,138 E-Rate Credits</u>: 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.

<u>\$73,618 Electricity Rates:</u> 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 Tranes 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. <u>It is only as good as the data available and the assumptions used.</u> 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).

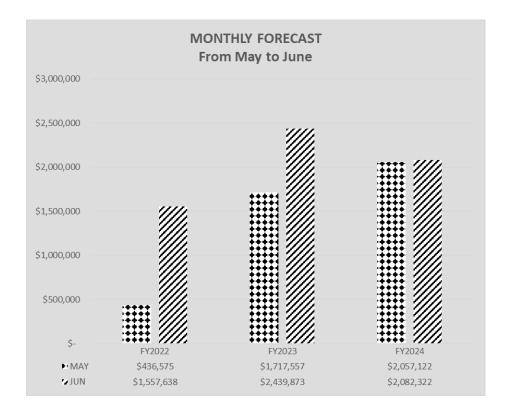
Revenues can be most impacted by decisions made at the State level for Special Education and Transportation grants. We have seen the reimbursement rate change in mid-year.

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 extracurriculuar activites. We hired more in-house substitutes to offset outside agency costs and it proved to be effective.

- \$33,278: Medical insurance claims and associated costs were \$27,846 lower than expected. Since we are self-insured, actual claims are not known until the end of the fiscal year. Payroll taxes, life insurance and defined contribution payments were less based on vacant positions.
- \$344,647 Purchased services were lower than forecasted. This included \$57,363 lower transportation and rental costs for athletics. Transportation needs are partially determined by a team's advancement in tournament play during the year and are difficult to gage. Athletics rentals of all weather fields at other location for teams' practice experience was not needed and other facility rentals were lower than anticipated. Special education transportation and tuition were also \$259,748 lower due to unexpected changes in outplacements, fewer unanticipated services than budgeted and unfilled positions in the department.
- \$83,850: Electrical and water consumption was lower thant 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 higer 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.

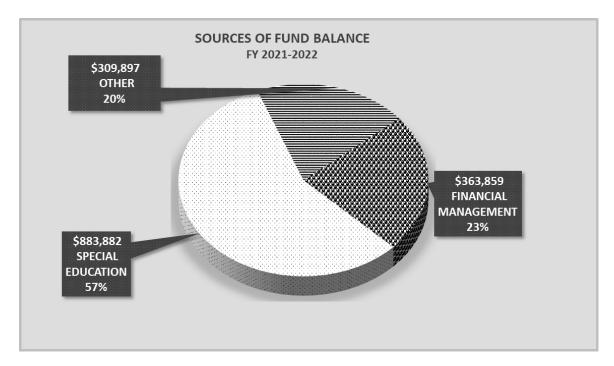
\$18,429 PURCHASED SERVICES (OTHER): Other purchased services accounts were under budget collectively by \$8,666 due to less printed materials and catered events. Data processing was under budget by \$9,763 as the administration consolidated onboarding software options at a reduced cost.

\$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..

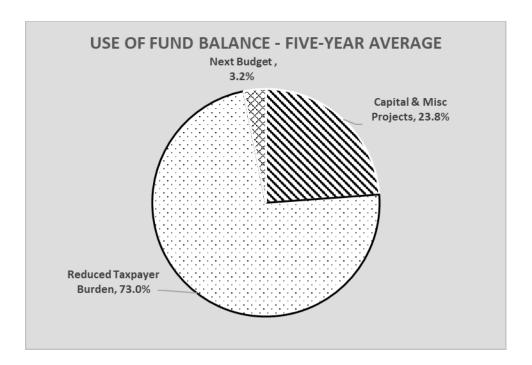
The primary sources of the fund balance are shown graphically below:



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 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 <u>audited</u> 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 maintance 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.

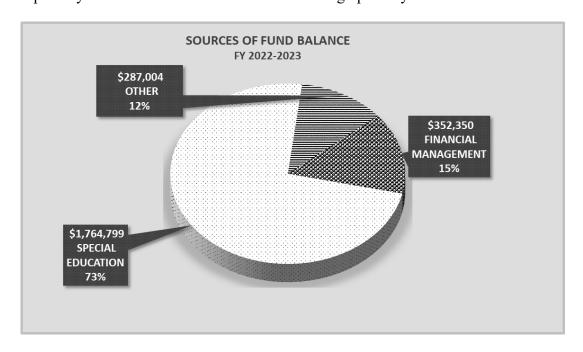
\$103,184 MEDICAL: The medical account was under budget \$103,184 due to the high staff turnover.

\$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.

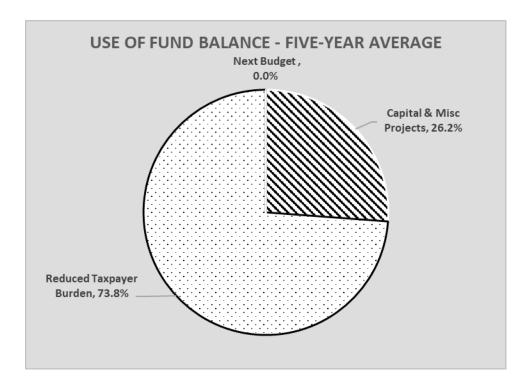
The primary sources of the fund balance are shown graphically below:



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 <u>audited</u> 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.

<u>OTHER:</u> \$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.

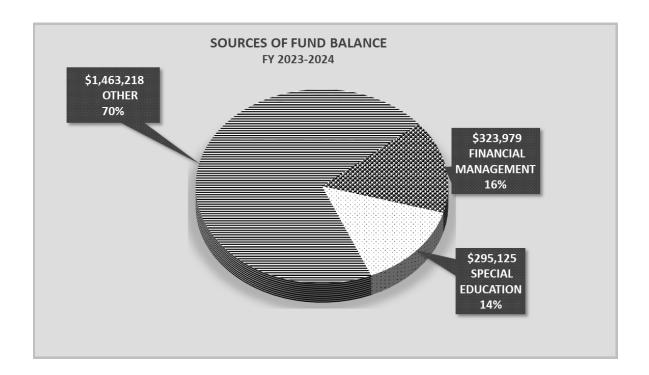
\$63,947 UTILIITES: Electricity, natural gas and oil were all under budget due to a mild winter and cooler spring.

\$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.

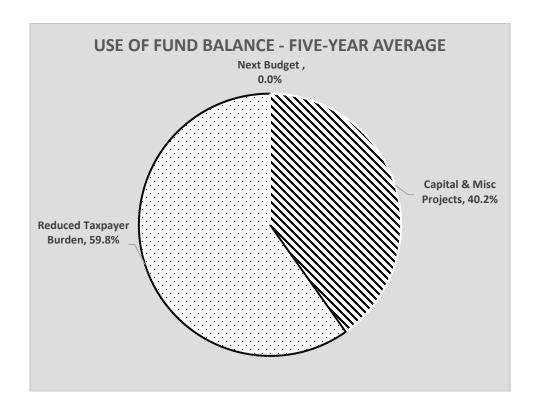
The primary sources of the fund balance are shown graphically below:



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:



<u>Unspent Funds:</u>
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 Regiona MONTH/YR JUL		District No. 5 - Budget Transfers 2024-2025 CCOUNT NUMBER & DESCRIPTION	AM	<u>IOUNT</u>	DESCRIPTION
no entries					
AUG '2024	7 1	-01-11-1014-5611 INSTRUCTIONAL SUPPLIES	\$	(10.00)	Hist. Membership To Ncss
AUG '2024		-01-11-1014-5810 DUES & FEES	\$		Hist. Membership To Ncss
AUG '2024		-02-11-1009-5611 INSTRUCTIONAL SUPPLIES	\$, ,	Textbook Purchase
AUG '2024	51 1	-02-11-1009-5641 TEXTBOOKS	\$	1.00	Textbook Purchase
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	\$		Replace Broken Laminator
SEPT '2024		-01-11-1009-5611 INSTRUCTIONAL SUPPLIES	\$		Mathcounts Registration Increa
SEPT '2024		-01-11-1009-5810 DUES & FEES	\$		Mathcounts Registration Increa
SEPT '2024 SEPT '2024		-02-14-2219-5611 INSTRUCTIONAL SUPPLIES -02-14-2350-5695 TECHNOLOGY SUPPLIES	\$ \$		To Purchase License For Class To Purchase License For Class
SEPT '2024		-01-14-2350-5695 TECHNOLOGY SUPPLIES	\$		Soundtrap-Added Enrollment
SEPT '2024		-01-11-1010-5330 OTHER PROFESSIONAL & TECH SRVC	\$		Soundtrap-Added Enrollment
SEPT '2024		-04-13-2190-5810 DUES & FEES	\$		Registration For Nyasp Conncas
SEPT '2024	182 1	-04-13-2190-5581 TRAVEL - CONFERENCES	\$	75.00	Registration For Nyasp Conncas
OCT '2024	15.1	-02-14-2350-5695 TECHNOLOGY SUPPLIES	\$	119 00	Add. Subscrib.Flangoo-Wl
OCT '2024		-02-11-1006-5611 INSTRUCTIONAL SUPPLIES	\$		Add. Subscrib.Flangoo-Wl
OCT '2024		-04-12-1200-5611 INSTRUCTIONAL SUPPLIES	\$		Resource Supplies
OCT '2024		-04-12-1200-5690 OTHER SUPPLIES	\$		Resource Supplies
OCT '2024		-01-13-2400-5810 DUES & FEES	\$		Regis. To Sci. & Eng. Fair
OCT '2024 NOV	155 1	-01-11-1013-5810 DUES & FEES	\$	50.00	Regis. To Sci. & Eng. Fair
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	\$		For Virtual Author Visit
NOV '2024		-01-13-2400-5330 PROFESSIONAL & TECH SRVC	\$		Desk For Principal
NOV '2024		-01-13-2400-5730 EQUIPMENT - NEW	\$		Desk For Principal
NOV '2024 NOV '2024		-05-14-2350-5695 TECHNOLOGY SUPPLIES -04-12-2151-5330 PROFESSIONAL & TECH SRVC	\$ \$		Raptor Safeschool Module Raptor Safeschool Module
NOV 2024 NOV '2024		-05-14-2350-5695 TECHNOLOGY SUPPLIES	\$		Addition Subcript Piano Marvel
NOV '2024		-02-14-2350-5695 TECHNOLOGY SUPPLIES	\$		Addition Subcript Piano Marvel
NOV '2024		-03-11-1010-5611 INSTRUCTIONAL SUPPLIES	\$		Transfer For Soundboard Replac
NOV '2024	124 1	-03-11-1010-5731 EQUIPMENT - REPLACEMENT	\$	1,070.00	Old Soundboard Beyond Repair
DEC '2024	14 1	-03-11-1018-5611 INSTRUCTIONAL SUPPLIES	\$	(600,00)	El Teacher Laptop
DEC '2024		-03-11-1018-5732 EQUIPMENT-TECHNOLOGY-NEW	\$		El Teacher Laptop
DEC '2024	17 1	-03-11-1001-5733 EQUIPMENT-TECHNOLOGY-REPLACE	\$		Sweetwater Software
DEC '2024		-03-11-1010-5695 TECHNOLOGY SUPPLIES	\$		Sweetwater Software
DEC '2024		-03-11-1009-5690 OTHER SUPPLIES	\$		Math Team Supplies
DEC '2024 DEC '2024		-03-11-1009-5641 TEXTBOOKS -02-13-2220-5330 PROFESSIONAL & TECH SRVC	Ф \$		Math Team Supplies American Library Association
DEC '2024		-02-13-2220-5810 DUES & FEES	\$		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	22.1	-05-13-2213-5322 INSTRUCTIONAL PROG IMPROVEMENT	\$	(2 475 00)	Building Thinking Classrooms
JAN '2025		-05-13-2212-5581 TRAVEL - CONFERENCES	\$		Building Thinking Classrooms
JAN '2025		-05-13-2212-5322 INSTRUCTIONAL PROG IMPROVEMENT	\$		Bard Institute - Ela
JAN '2025		-05-13-2212-5581 TRAVEL - CONFERENCES	\$		Bard Institute - Ela
JAN '2025		-01-13-2220-5611 INSTRUCTIONAL SUPPLIES	\$		Media Center Supplies
JAN '2025 JAN '2025		-01-13-2220-5690 OTHER SUPPLIES -04-12-6130-5560 TUITION EXPENSE	\$		Media Center Supplies
JAN '2025 JAN '2025		-04-12-0130-3500 TOTTION EXPENSE -04-12-1200-5581 TRAVEL - CONFERENCES	φ \$		Prnt Reimb Priv Plced Student Prnt Reimb Priv Plced Student
JAN '2025		-04-12-1200-5330 PROFESSIONAL & TECH SRVC	\$		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		-05-13-2213-5322 INSTRUCTIONAL PROG IMPROVEMENT	\$		Syst.Instr.Impr.Prg Membership
JAN '2025 FEB' 2025	227 1	-05-13-2213-5810 DUES & FEES	\$	1,489.00	Syst.Instr.Impr.Prg Membership
FEB' 2025	43 1	-01-13-2400-5330 PROFESSIONAL & TECH SRVC	\$	(1,235,00)	Phys Ed. Speaker System
FEB' 2025		-01-13-2400-5730 EQUIPMENT - NEW	\$		Phys Ed. Speaker System
FEB' 2025	49 1	-01-14-2350-5695 TECHNOLOGY SUPPLIES	\$		Infobase Database For Amsb Ss

Amity Regional MONTH/YR FEB' 2025	JNL# A49 1 64 1 64 1 87 1 87 1 91 1 94 1 189 1 189 1 192 1	District No. 5 - Budget Transfers 2024-2025 CCOUNT NUMBER & DESCRIPTION -01-13-2220-5642 LIBRARY BOOKS & PERIODICALS -05-13-2212-5590 OTHER PURCHASED SERVICES -05-13-2213-5590 OTHER PURCHASED SERVICES -02-13-2220-5330 PROFESSIONAL & TECH SRVC -02-13-2220-5810 DUES & FEES -05-11-1005-5611 INSTRUCTIONAL SUPPLIES -05-11-1005-5641 TEXTBOOKS -03-14-2600-5613 MAINTENANCE/CUSTODIAL SUPPLIES -03-14-2600-5731 EQUIPMENT - REPLACEMENT -02-13-2220-5642 LIBRARY BOOKS & PERIODICALS -02-13-2220-5690 OTHER SUPPLIES -01-13-2400-5330 PROFESSIONAL & TECH SRVC -01-13-2400-5730 EQUIPMENT - NEW	<u>AN</u> \$\$\$\$\$\$\$\$\$\$\$\$\$\$\$	(148.00) 148.00 (125.00) 125.00 (2,600.00) 2,600.00 (440.00) 440.00 (253.00) 253.00 (111.00)	DESCRIPTION Infobase Database For Amsb Ss Gold Pen Award Ceremony Gold Pen Award Ceremony American Library Assoc. Dues American Library Assoc. Dues Books Amsb Amso Reading Books Amsb Amso Reading Transfer For Office Chair Transfer For Office Chair Advisory Group Book Party Advisory Group Book Party Phys Ed Equipment/Microphones 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	\$		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	\$		Move To Instructional Supplies
MAR '2025	85 1	-03-11-1001-5611 INSTRUCTIONAL SUPPLIES	\$		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		-01-11-1011-5420 REPAIRS, MAINTENANCE & CLEANING	\$	(1,000.00)	
MAR '2025		-01-11-1011-5611 INSTRUCTIONAL SUPPLIES	\$		Gaga Pit
MAR '2025		-01-11-1011-5730 EQUIPMENT - NEW	\$		Gaga Pit
MAR '2025		-01-13-2220-5330 PROFESSIONAL & TECH SRVC	\$		Teacher Appreciation
MAR '2025	97 1	-01-14-2219-5690 OTHER SUPPLIES	\$		Teacher Appreciation
MAR '2025		-03-11-1006-5611 INSTRUCTIONAL SUPPLIES	\$		Wireless Mouse Replacements
MAR '2025		-03-11-1006-5733 EQUIPMENT-TECHNOLOGY-REPLACE	\$		Wireless Mouse Replacements
MAR '2025		-03-13-2220-5690 OTHER SUPPLIES -03-13-2220-5642 LIBRARY BOOKS & PERIODICALS	\$		Transfer To Purchase Books Transfer To Purchase Books
MAR '2025 MAR '2025		-03-13-12220-3042 LIBRARY BOOKS & PERIODICALS -03-11-1014-5690 OTHER SUPPLIES	\$		New Britain Museum Of Art Wksh
MAR '2025		-03-11-1014-5810 DUES & FEES	\$ \$,	New Britain Museum Of Art Wksh
MAR '2025	140 1	-04-12-1206-5330 PROFESSIONAL & TECH SRVC	\$		Virtual Education Delivery
MAR '2025	140 1		\$		Virtual Education Delivery
MAR '2025	153 1	-03-11-1009-5695 PROFESSIONAL & TECH SRVC	\$		Fees And Cords
MAR '2025	153 1	-03-11-1009-5810 DUES & FEES	\$, ,	Fees And Cords
MAR '2025		-03-11-1010-5810 DUES & FEES	\$		Transfer For Music Fest Tech
MAR '2025	154 1	-03-11-1010-5330 PROFESSIONAL & TECH SRVC	\$		Transfer For Music Fest Tech
MAR '2025		-03-11-1010-5440 RENTALS-LAND,BLDG,EQUIPMENT	\$		For Tech Service Rentals Eoy
MAR '2025		-03-11-1010-5330 PROFESSIONAL & TECH SRVC	\$		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	\$		Need Journals And Certificates
MAR '2025	181 1	-03-11-1005-5611 INSTRUCTIONAL SUPPLIES	\$		Need Journals And Certificates
MAR '2025		-05-11-1005-5611 INSTRUCTIONAL SUPPLIES	\$		Books For Middle Schools Ela
MAR '2025		-05-11-1005-5641 TEXTBOOKS	\$	•	Books For Middle Schools Ela
MAR '2025	184 1		\$		Replace Broken Vacuum
MAR '2025	184 1	-03-14-2600-5731 EQUIPMENT - REPLACEMENT	\$		Replace Broken Vacuum
MAR '2025		-03-11-1010-5420 REPAIRS, MAINTENANCE & CLEANING	\$ \$		Cello Unrepairable-Replacement Cello Unrepairable-Replacement
MAR '2025 APR '2025	264 1	-03-11-1010-5731 EQUIPMENT - REPLACEMENT	ф	1,240.00	Cello Unrepairable-Replacement
APR '2025	10 1	-03-11-1014-5810 DUES & FEES	Ф	1 000 00	Ap Us History Workshop
APR '2025		-03-11-1014-3610 DOES & LES -03-11-1014-5690 OTHER SUPPLIES	\$ \$		Ap Us History Workshop
APR '2025		-05-14-2660-5330 PROFESSIONAL & TECH SRVC	\$		Security Window Film
APR '2025		-05-14-2660-5715 IMPROVEMENTS TO BUILDINGS	\$		Security Window Film
APR '2025		-05-14-2660-5690 OTHER SUPPLIES	\$		Security Window Film
APR '2025	91 1	-05-14-2660-5715 IMPROVEMENTS TO BUILDINGS	\$		Security Window Film
APR '2025	155 1	-03-14-2600-5613 MAINTENANCE/CUSTODIAL SUPPLIES	\$		Rent Uhaul Truck-Referendum
APR '2025		-05-14-2600-5440 RENTALS-LAND,BLDG,EQUIPMENT	\$		Rent Uhaul Truck-Referendum
APR '2025		-03-11-3202-5330 PROFESSIONAL & TECH SRVC	\$		Ice Hockey Rentals
APR '2025		-03-11-3202-5440 RENTALS-LAND,BLDG,EQUIPMENT	\$		Ice Hockey Rentals
APR '2025		-04-12-6130-5560 TUITION EXPENSE	\$		Tutoring For Homebound Student
APR '2025	174 1	-04-15-1204-5330 PROFESSIONAL & TECH SRVC	\$		Tutoring For Homebound Student
APR '2025	196 1	-03-14-2600-5613 MAINTENANCE/CUSTODIAL SUPPLIES	\$,	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 D	istrict No. 5 - Budget Transfers 2024-2025			
MONTH/YR	JNL# AC	CCOUNT NUMBER & DESCRIPTION	AMO	TNUC	<u>DESCRIPTION</u>
APR '2025	200 1	-02-13-2220-5810 DUES & FEES	\$	(43.00)	TuneFab Audible Converter
APR '2025	200 1	-02-13-2220-5611 INSTRUCTIONAL SUPPLIES	\$	43.00	TuneFab Audible Converter
APR '2025	230 1	-02-11-3202-5330 PROFESSIONAL & TECH SRVC	\$	(2,511.82)	Riddell Quote
APR '2025	230 1	-03-11-3202-5690 OTHER SUPPLIES	\$	2,511.82	Riddell Quote
MAY '2025					
MAY '2025	19 1	-02-13-2220-5330 PROFESSIONAL & TECH SRVC	\$	(900.00)	Supplies Needed For Year End
MAY '2025	19 1	-02-13-2220-5690 SUPPLIES	\$	900.00	Supplies Needed For Year End
MAY '2025	52 1	-03-11-1013-5611 INSTRUCTIONAL SUPPLIES	\$	(195.00)	Transfer To Cover Nmea Conf
MAY '2025	52 1	-03-11-1013-5581 TRAVEL - CONFERENCES	\$	195.00	Transfer To Cover Nmea Conf
MAY '2025	83 1	-03-14-2600-5613 MAINTENANCE/CUSTODIAL SUPPLIES	\$	(2,800.00)	Frontier Invoices Increased
MAY '2025	83 1	-05-14-2320-5550 COMMUNICATIONS: TEL,POST,ETC.	\$	2,800.00	Frontier Invoices Increased
MAY '2025	84 1	-04-12-2151-5330 PROFESSIONAL & TECH SRVC	\$	(2,500.00)	Btservices Beacon
MAY '2025	84 1	-04-13-2190-5330 PROFESSIONAL & TECH SRVC	\$	2,500.00	Btservices Beacon
MAY '2025	120 1	-01-11-3202-5510 PUPIL TRANSPORTATION	\$	(1,500.00)	Hs Athletic Transportation
MAY '2025	120 1	-03-11-3202-5510 PUPIL TRANSPORTATION	\$	1,500.00	Hs Athletic Transportation
MAY '2025	236 1	-04-13-2130-5330 PROFESSIONAL & TECH SRVC	\$	(2,900.00)	Medical Equip For Sails Stu
MAY '2025	236 1	-04-12-1206-5730 EQUIPMENT - NEW	\$	2,900.00	Medical Equip For Sails Stu

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: June 2, 2025

Staff Development:

Dr. Perry Carlson is requesting a transfer to cover the professional learning for administrators. The transfer is covered within the department.

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 learning.

ACCOUNT			
NUMBER	ACCOUNT NAME	FROM	TO
05-13-2212-5111	Salaries	\$6,300	
05-13-2213-5322	Professional Services		\$6,300

ARHS Art Department:

Mr. Hauser is requesting a transfer to cover a new kiln in the art department. The current kiln has had many repairs over the last several years, most recently in December. The kiln is more than 15 years old. The department chair notified the administration last week the kiln is down again. The transfer requested is for \$7,500 from contingency to replacement equipment.

For the Amity Finance Committee:

Recommend the Amity Board of Education approve...

For the Amity Board of Education:

Move to approve this transfer for kiln replacement.

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
05-15-0000-5850	Contingency	\$7,500	
03-11-1001-5731	Equipment-Replacement		\$7,500

Facilities:

Mr. Martoni is requesting a transfer from contingency for an emergency repair of a curb that has disintegrated. The repair is \$7,000 UNF.

For the Amity Finance Committee:

Recommend the Amity Board of Education approve...

For the Amity Board of Education:

Move to approve this transfer for curb repair.

ACCOUNT			
NUMBER	ACCOUNT NAME	FROM	TO
05-15-0000-5850	Contingency	\$7,000	
03-14-2600-5420	Repairs & Maintenance		\$7,000

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 2025-2026

Date: June 3, 2025

Facilities:

Mr. Martoni is requesting a transfer to cover the new bell, public address and lockdown systems at each middle school. The request is to transfer \$13,406 from the AMSB line to the AMSO line. The implementation at AMSO is more expensive due to the lack of visibility of AMSO building from the field, requiring a remote notification system. This remote system consists of a wireless receiver, outdoor strobes, horns among other additional components. The project at AMSB is less than budgeted, so between the two schools we are under budget by \$33. However, a transfer is requested to fund each account accordingly. Mr. Martoni and Mr. DeRosa researched systems. Eastern Datacomm is a vendor on the PEPPM technology cooperative purchasing program which meets our bid policy requirements. References were checked as well as a site visit to another school who recently had the system installed from Eastern Datacomm.

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 covers the cost of equipment and installation for bell, PA, and lockdown systems at both middle schools and waive the bid requirement.

ACCOUNT			
NUMBER	ACCOUNT NAME	FROM	TO
01-14-2600-5715	Improvements to Sites	\$13,406	
02-14-2600-5715	Improvements to Sites		\$13,406

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 or silenced 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

Use of Cell Phones and Other Personal Electronic Devices

where use of the device would cause any disruption unless there is a bona fide health or safety emergency.

High School - Cellular telephones shall be powered off or silenced 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 – High School Only

High school 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 regulations for the use of cell phones or personal electronic devices aimed at promoting an optimal learning environment. The teacher shall review the conduct regulations with the student(s) prior to permitting student use of a cell phone for explicit educational purposes.

High school students may use cell phones and other personal electronic devices during lunch, transitions between classes, and other times when 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 used with headphones provided the device is not used during class. Care for headphones is the student's responsibility. Any inappropriate use will result in confiscation.

Use of Personal Electronic Devices – Students with Disabilities

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.

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

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

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.

An administrator may search a student's cell phone/smartwatch or other personal electronic device if the administrator has reasonable suspicion that a law or Board policy 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 or solicitation for such nude 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.

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.

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

Use of Cell Phones and Other Personal Electronic Devices

District strongly encourages parents/guardian to set expectations for their student(s) to take precautions to safeguard their personal property.

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 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. 5145.12 – Search and Seizure)

(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

June 9, 2025

To: Members of the Board of Education

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

Re: Personnel Report

NEW HIRES-CERTIFIED:

• District:

Katherine Beezer – F/T TESOL (Teaching English to Speakers of Other Languages) Teacher – Katie brings to Amity several years of experience teaching and supporting MLL (Multilingual Learners), most recently at Achievement First Amistad High School where she served as the MLL Coordinator. She is dual certified in TESOL and Social Studies and earned her Bachelor's Degree in History and her Master's in Education, both from University of Rochester.

• Amity Regional High School:

Anthony Pereiro – F/T Chemistry Teacher – Anthony brings a wide array of teaching experience to Amity. His experience includes teaching Science and English in numerous cities in Japan for 6 years before returning to Connecticut where he most recently served as a Science Teacher in the Canton Public School District. Anthony earned his Bachelor's Degree in Biology from Southern CT. State University and his Master's Degree in Education from Sacred Heart University.

Yi-Pei Miller – P/T Math Teacher – Yi-Pei, also known as Betty, returns to Amity with 10 years of experience teaching math at the secondary level. Originally, Betty served as a Math Interventionist for Amity during the 2023-2024 school year. Betty earned her Bachelor's Degree in Mathematics from George Mason University and her Master's Degree also in Mathematics from Columbia University.

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

Kyle Tobin – F/T Special Education Teacher – Kyle completed his student teaching at LEARN Ocean Avenue Learning Academy in New London. While pursuing his graduate studies, Connor served as an Intervention Specialist, also at LEARN. Connor earned a Bachelor's Degree in Communications from Southern New Hampshire University and his Master's Degree in Educational Psychology from University of Connecticut.

- **♣** New Hires-Bench/Long Term Substitutes/Tutors: None
- **♣** New Hires-Non-Certified: None
- **♣** NEW HIRES-COACHES: NONE

TRANSFERS:

Shannon Flynn – Full Time Paraprofessional in 7-8 SAILS Program at Amity Middle School Orange to Special Education Tutor in the 9-12 SAILS Program at Amity Regional High School, effective 08/19/2025.

RESIGNATIONS:

Michael Marchitto – Varsity Boys Soccer Head Coach – Amity Reg. High School, eff. 5/19/2025

Pasquale Romano – Assistant Boys Soccer Head Coach – Amity Reg. High School, eff. 5/27/2025

Michael Zaffino – In School Suspension Tutor – District Offices, eff. 6/11/2025

Jennifer Vazquez – Paraprofessional – Amity Transition Academy, eff 6/11/2025

RETIREMENTS:

Catherine Covino – FT Paraprofessional ~ Amity Middle School-Bethany, eff. 6/30/2025 *Joseph Robinson* – FT Information Technology Specialist ~ Amity Middle School-Bethany, eff. 7/25/2025