

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, November 10, 2025 6:30 pm
25 Newton Road, Woodbridge, CT
Lecture Hall

1. **CALL TO ORDER**
2. **PLEDGE OF ALLEGIANCE**
3. **APPROVAL OF MINUTES** [page 4](#)
 - a. Board of Education Regular Meeting – October 27, 2025
4. **PUBLIC COMMENT**
5. **PRESENTATION OF CSDE NEXT GENERATION ACCOUNTABILITY RESULTS 2024-2025**
6. **3 A's (Academics, Arts, Athletics) AND POG (Portrait of the Graduate) FOCUS PRESENTATION**
Professional Learning Day - AI Wisdom from Students – Dr. Perry Carlson, AI Council
7. **PRESENTATION OF 2026-2027 SCHOOL CALENDAR** [page 6](#)
8. **DISCUSSION AND POSSIBLE ACTION ON SETTING 2026 GRADUATION DATE – June 11, 2026**
9. **DISCUSSION AND POSSIBLE ACTION ON 2026 BOARD OF EDUCATION REGULAR MEETING SCHEDULE** [pg7](#)
10. **CORRESPONDENCE**
11. **CHAIRMAN'S REPORT**
 - a. Committee Reports
 1. **ACES**
 2. **Ad Hoc School Start Time**
 3. **CABE**
 4. **Communications**
 5. **Curriculum**
 - a. Discussion and Possible Action on Approval of Revised Curricula
 - i. [Advanced Pastry](#) (formerly *Creative Kitchen*)
 - ii. [Introduction to Computing](#)
 - iii. [College Writing and Research](#) (formerly *Writing for College and Career*)
 - iv. [Algebra 1](#)
 6. **District Health and Safety**
 7. **District Technology** [page 8](#)
 - a. Monthly Report
 8. **Facilities** [page 9](#)
 - a. Monthly Report
 9. **Finance**
 - a. Discussion and Possible Action on Contracts over \$35,000 [page 10](#)
 - i. Transportation
 - b. October 1 Enrollment Report [page 12](#)

PLEASE POST

PLEASE POST

- c. Discussion of Monthly Financial Statements [page 14](#)
 - i. Special Education Update
- ci. Director of Finance and Administration Approved Transfers Under \$3,000 [page 45](#)
- cii. Discussion and Possible Action on Budget Transfers over \$3,000 [page 46](#)

10. **Policy**

- a. First Reads
 - i. Policy 6142.101 - Student Nutrition and Physical Activity [page 48](#)
- b. Second Reads
 - i. Policy 6161.12 - Library Material Review and Reconsideration [page 53](#)
 - ii. Policy 6161.13 - Library Collection Development and Maintenance [pg 56](#)
 - iii. Policy 6161.14 - Library Display and Program [page 58](#)
- c. Discussion and Possible Action on the removal of Policy 6161.1 - Selection of Library Media Center Materials and Resources

11. **Personnel**

- a. Personnel Report [page 59](#)

12. **NEW BUSINESS & ANNOUNCEMENTS**

13. **ITEMS FOR THE NEXT REGULAR MEETING AGENDA – Due to Chairperson by November 28, 2025**

14. **ADJOURNMENT**



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

pc: Town Clerks Bethany, Orange, Woodbridge

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

District Mission Statement

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

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



NORMS

BE RESPECTFUL

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

HONOR THE POSITION

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

REPRESENT THE BOARD WITH UNITY AND PRIDE

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

AMITY REGIONAL BOARD OF EDUCATION SPECIAL MEETING MINUTES
Monday, October 27, 2025 6:30 pm
25 Newton Road, Woodbridge, CT
Lecture Hall

BOARD MEMBERS PRESENT

Cathy Bradley* arrived at 6:38, Paul Davis, Carla Eichler, Sean Hartshorn, Andrea Hubbard, Dr. Karunakaran* arrived at 6:38, Christina Levere-D’Addio, Dana Lombardi, Michael McDonough, Patrick Reed

BOARD MEMBERS ABSENT

Dr. Oladele, Donna Schlank, and Donna Schuster

STUDENT BOARD MEMBERS PRESENT

Janet Fan and Shreya Viswanathan

STAFF MEMBERS PRESENT

Dr. Jennifer Byars, Dr. Shannan Carlson, Andrea Drewry, Victoria Hulse, Adrianna Linkstrom Marissa Nall, Sarah Sharkey, and Michelle Shoop

1. CALL TO ORDER

Chairperson Davis called the meeting to order at 6:36 p.m.

2. PLEDGE OF ALLEGIANCE

Led by Amity Board of Education Chair Paul Davis

3. APPROVAL OF MINUTES

a. Board of Education Regular Meeting – October 06, 2025

MOTION by Patrick Reed, SECOND by Christina Levere-D’Addio to approve October 06, 2025 minutes as submitted.

VOTES IN FAVOR, 4 (Eichler, Levere-D’Addio, Reed, Davis)

ABSTAIN, 4 (Hartshorn, Hubbard, Lombardi, McDonough)

MOTION CARRIES

4. STUDENT REPORT

a. Monthly Report

Presented by Board of Education student representative Janet Fan and Shreya Viswanathan

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

a. [Global Studies Project](#) - Sarah Sharkey and Marissa Nall

6. SUPERINTENDENT’S REPORT

a. Superintendent Report

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

7. CHAIRMAN’S REPORT

- a. Committee Reports
 - 1. Curriculum and Instruction
 - a. Presentation and Discussion of Revised Curricula
 - i. [Advanced Pastry](#) (formerly *Creative Kitchen*)
 - ii. [Introduction to Computing](#)
 - iii. [College Writing and Research](#) (formerly *Writing for College and Career*)
 - iv. [Algebra 1](#)
 - b. Discussion and Possible Action on Approval of Revised Curricula
 - i. [Chinese I](#)
 - ii. [Chinese II](#)
 - iii. [Chinese III](#)
 - iv. [Spanish I](#)
 - v. [Latin I](#)

MOTION by Sean Hartshorn, SECOND by Cathy Bradley to approve revised curricula for Chinese I, Chinese II, Chinese III, Spanish I and Latin I.

VOTES IN FAVOR, 10 (UNANIMOUS)

MOTION CARRIES

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

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

10. ADJOURNMENT

Chairperson Davis adjourned the meeting, without objection, at 7:39 p.m.

Respectfully submitted,

Lisa Zaleski

Lisa Zaleski

BOE Recording Secretary

Amity Regional School District No. 5

2026-2027 District Calendar



2026-2027



Date	Event or Holiday
August 25	Prof. Dev. - Teachers Only
August 26	Prof. Dev. - Teachers Only
August 27	Prof. Dev. - Teachers Only
August 31	1st Day of School - Students <i>Early Dismissal</i>
September 1	Students <i>Early Dismissal</i>
September 7	Labor Day - No School
September 10	Back to School Night - ARHS - Grades 9&12
September 15	Back to School Night - Middle Schools
September 16	Back to School Night - ARHS - Grades 10&11
September 17	<i>Early Dismissal</i> - Professional Learning
September 21	Yom Kippur
October 12	Columbus/Indigenous Peoples - No School
October 22	<i>Early Dismissal</i> - Professional Learning
November 3	Prof. Dev. - Teachers Only
November 4	Parent Conferences - Middle Schools
November 5	Parent Conferences - High School
November 11	Parent Conferences - High School
November 12	Parent Conferences - Middle Schools
November 25	<i>Early Dismissal</i>
November 26, 27	Thanksgiving - No School
December 2	Parent Conferences - MS/HS - <i>Early Dismissal</i>
December 10	<i>Early Dismissal</i> - Professional Learning
December 23	<i>Early Dismissal</i>
December 24 - January 1	Holiday Recess - No School
January 7	<i>Early Dismissal</i> - Professional Learning
January 18	Martin Luther King, Jr. Day - No School
February 3	Parent Conferences - Middle Schools
February 4	<i>Early Dismissal</i> - Professional Learning
February 9	Parent Conferences - Middle Schools
February 10	Parent Conferences - High School
February 12 - 16	Winter Recess - No School
March 10	Eid al-Fitr - No School
March 18	<i>Early Dismissal</i> - Professional Learning
March 26	Good Friday - No School
April 12-16	Spring Recess - No School
April 22	<i>Early Dismissal</i> - Professional Learning
May 31	Memorial Day - No School
June 14	Last Day of School - Students

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25	26	27	28	29	30	31

If emergency closings extend beyond June 30, 2027, then any additional days will be taken from Spring Recess, beginning with April 12, 2027. Amity Regional High School Graduation is traditionally held on the actual last day of school for students. Total Days For Students = 181; Total Days For Teachers = 185

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

2025 BOARD OF EDUCATION REGULAR MEETING SCHEDULE
Approved by the Amity Board of Education {Insert Date}

Regular meetings of the Amity Regional School District No. 5 Board of Education will be held on the second Monday of every month, unless otherwise noted. All meetings will be held in the Lecture Hall at Amity Regional High School, 25 Newton Road, Woodbridge, CT 06525. Any meeting location changes will be listed on the meeting notices. Meetings will begin at 6:30 p.m.

Monday	January 12, 2026	
Monday	February 9, 2026	
Monday	March 9, 2026	
Monday	April 6, 2026	<i>Exception</i> First Monday of the month
Monday	May 11, 2026	
Monday	June 8, 2026	
Monday	August 17, 2026	<i>Exception</i> Third Monday of the month
Monday	September 14, 2026	
Monday	October 5, 2026	<i>Exception</i> First Monday of the month
Monday	November 9, 2026	
Monday	December 14, 2026	
Monday	January 11, 2027	

Respectfully submitted,

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

November 2025

Oct. Ticket Summary

Tickets addressed and closed: 286

Tickets open: 12

HS Student Help Desk

Students helped: 234

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:

- Student Help desk at the HS is staffed daily by 6 HS student employees
- New computers and monitors for the machine shop in the HS have been imaged and are being installed before Thanksgiving break
- Initial 2026-2027 District Technology Budget has been built

Projects in process:

- Working with vendors to assess the current status of our servers that are approaching end of warranty and expected operational life.
- Exploring options for a complete website content management system update
- Final Promethean Boards are being hung in MS World Language classrooms
- Working with Verizon to address cell network coverage issues in our buildings
- Continuing to replace security cameras in all schools
- Upgrade and replacement of Middle School Bell/Paging and Emergency Notification system under way in both Orange and Bethany



November 2025

CLEAN

SAFE

HEALTHY

SCHOOLS

FMX Report

For October
88 requests opened
66 requested closed

Amity Regional School District No. 5

Facilities Department Monthly Report

Completed Projects:

- The fire suppression system for the data room at ARHS is scheduled to be commissioned this month.
- Our in-house electrician added additional outlets in some classrooms at AMSO for the new Promethean boards
- Preventive maintenance/seasonal cleaning of the boilers and water heaters at all three schools was completed by an outside contractor.
- A heating element for the dishwasher at ARHS was replaced by an outside contractor.
- The switchover from cooling to heating was completed towards the end of October.
- A few heating valve actuators District wide were replaced by our in-house HVAC mechanic.

Projects in process:

- The bell and paging system upgrades for the Middle Schools are underway. Preliminary wiring and additional speakers are being installed this month.
- The AMSB fire pump replacement project bid is posted. Bid openings will be held on November 14th.
- Invitations to submit qualifications/fee proposals from qualified architectural firms to study the space design to upgrade the media centers and create additional classroom space at the Middle Schools went out for bid on November 5th.
- The dividing wall for the classroom at AMSB is in progress and scheduled for a December 11th installation.
- The irrigation pump at ARHS was not building adequate pressure and is being repaired by an outside contractor.
- A circulator pump for the chilled water loop at ARHS is being repaired by an outside contractor.
- The District is working with Miller Steel Buildings to purchase two storage buildings for the Middle Schools to address storage needs.
- The District is working with Blasius Chevrolet on pricing for the District pickup truck replacement.

Outstanding issues to be addressed:

The District has been collaborating with the Town of Woodbridge to address concerns regarding the fuel cell and micro-grid. UI has issued its findings for the failed tests from this past summer and are planning to try another retest on November 22nd.

The house lighting dimmer rack in the Brady Center at ARHS had a main control module fail, rendering the lights inoperable. A temporary module is in place while the failed one is being rebuilt by an outside vendor. There are no replacement parts for this due to age, and replacement options for the rack and controls are being explored.



Amity Regional School
District No. 5

25 Newton Road

Woodbridge, CT 06525

Phone: 203-397-4817

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 Contract of \$35,000 or More
 Date: October 9, 2025

CONTRACT RENEWALS:

A. Transportation:

The Board of Education approved a 5-year contract for daily transportation runs in May of 2022. The Bethany and Woodbridge Boards of Education worked with Amity to reach a contract with our owner operators and stabilize rates across the districts. The owner/operators have requested a contract extension of 3 years. The 3-year extension combined with the 2 remaining years of the contract assists contractors in maintaining and attracting drivers with competitive compensation, training and benefits; maintaining and insuring the vehicle(s). The Bethany, Woodbridge, and Amity Administrators reviewed rates of other bus contracts and negotiated the extension rates below. These rates will still be just below the mid-range of rates for transportation.

Negotiated Terms:

Price for up to 185 days of school.

FULL RUN				
Year	Annual Rate	Per Diem	Per Mile over 13,000	Percentage
2027-2028	\$81,047	\$438.09	\$3.11	9.25%
2028-2029	\$88,139	\$476.73	\$3.38	8.75%
2029-2030	\$95,631	\$516.92	\$3.67	8.50%

HALF RUN			
Year	Rate	Per Diem	Percentage
2027-2028	\$44,575	\$240.95	14.0%
2028-2029	\$49,924	\$269.86	12.0%
2029-2030	\$55,915	\$302.24	12.0%

SPECIAL RUN, ATHLETIC & FIELD TRIPS		
Year	Hourly Rate	Percentage
2027-2028	\$86.47	19.0%
2028-2029	\$94.17	8.9%
2029-2030	\$102.65	9.0%

LATE RUNS (Amity Only)		
Year	Hourly Rate	Percentage
2027-2028	\$3.43 per mile; flat rate of \$14.05 per day	19.0%
2028-2029	\$3.74 per mile; flat rate of \$15.30 per day	8.9%
2029-2030	\$4.08 per mile; flat rate of \$16.68 per day	9.0%

Adjustment to Paragraph IV:

The term of this contract shall be for a period of five (5) years beginning on July 1, 2025 and terminating on June 30, 2030 (the term).

All other terms and conditions of the current agreement will apply

If approved, the daily rate is still lower than the majority of other area rates. There is no change in current owner/operators as we negotiated with existing contractors. This is a joint contract with Bethany and Woodbridge. Woodbridge and Bethany have approved the contract.

Recommended Motions:

Amity Finance Committee:
Recommend the Amity Board of Education...

Amity Board of Education

Waive the bid process and extend the transportation contracts through June 30, 2030 to the current owner/operators per the prices listed above.

ENROLLMENT REPORT OCTOBER 1, 2025

TOWN	Elementary - BOW (Pre K - 6)								Amity District #5 (7-12)						Outside Placements	V0-AG / Magnet / Charter	ADM*	Open Choice by School	Tuition by School	Exchange or State Placed Students	Total
	Pre-K	K	1	2	3	4	5	6	7	8	9	10	11	12							
Bethany	18	49	58	60	46	64	61	76	68	61	46	51	47	67	Gr 7: 0 Gr 8: 0 Gr 9: 0 Gr 10: 1 Gr 11: 0 Gr 12: 2 Total: 3	Gr 7: 0 Gr 8: 0 Gr 9: 3 Gr 10: 1 Gr 11: 2 Gr 12: 2 Total: 8	351	7	0	0	358
Orange	61	166	139	161	194	181	173	196	167	185	174	148	165	150	Gr 7: 1 Gr 8: 0 Gr 9: 1 Gr 10: 1 Gr 11: 0 Gr 12: 6 Total: 9	Gr 7: 0 Gr 8: 1 Gr 9: 7 Gr 10: 9 Gr 11: 2 Gr 12: 7 Total: 26	1,024	9	0	0	1,033
Woodbridge	24	85	106	133	122	140	128	127	124	135	116	130	126	116	Gr 7: 0 Gr 8: 1 Gr 9: 1 Gr 10: 1 Gr 11: 0 Gr 12: 5 Total: 8	Gr 7: 0 Gr 8: 0 Gr 9: 1 Gr 10: 2 Gr 11: 3 Gr 12: 3 Total: 9	764	29	8	2	803
Category Totals	103	300	303	354	362	385	362	399	359	381	336	329	338	333	20	43	2,139	45	8	2	2,194

Bethany Elementary:	432
Orange Elementary:	1271
Woodbridge Elementary:	865
TOTAL	2568

Bethany Middle*:	395
Orange Middle:	361
<i>*Bethany & Woodbridge residents</i>	

GRAND TOTAL FOR GRADES 7-12:	2,131
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* Subtotal - To be used for A.D.M. calculation for budget process	2139
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11/6/2025

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: October 1, 2025 Enrollment Report
Date: October 23, 2025

Attached to this memorandum is the October 1, 2025 enrollment report. There is a current net decrease in Average Daily Membership (ADM) of 14 students. Total enrollment decreased by 7 students compared to the anticipated increase of 10 students. This ADM is used to determine the member town allocations for the 2026-2027 budget. If there were no changes in the budget, the Towns of Woodbridge and Bethany will have increases in their share of the budget, while the Town of Orange will have a decrease in their allocation.

Average Daily Membership				
	Bethany	Orange	Woodbridge	Total
October 2025	351	1,024	764	2,139
October 2024	347	1,043	763	2,153
Net Change	4	(19)	1	(14)
Fiscal Year 2026-2027	16.410%	47.873%	35.717%	100.000%
Fiscal Year 2025-2026	16.117%	48.444%	35.439%	100.000%
Net Change	0.293%	-0.571%	0.278%	
Change in Member Town Allocations with a 0% Budget Increase for 2026-2027				
	Bethany	Orange	Woodbridge	Total
Enrollment Shift	\$ 166,529	\$ (324,533)	\$ 158,004	\$ (0.00)

**AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES AND EXPENDITURES
FY 2025-2026**

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2024-2025	2025-2026	SEPT 25	CHANGE	OCT 25	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
1	MEMBER TOWN ALLOCATIONS	55,272,025	56,835,803	56,835,803	0	56,835,803	0	FAV
2	OTHER REVENUE	323,394	221,597	254,596	0	254,596	32,999	FAV
3	OTHER STATE GRANTS	991,294	1,036,599	1,032,699	7,278	1,039,977	3,378	FAV
4	MISCELLANEOUS INCOME	20,139	15,000	15,000	0	15,000	0	FAV
5	TOTAL REVENUES	56,606,852	58,108,999	58,138,098	7,278	58,145,376	36,377	FAV
6	SALARIES	30,600,178	32,683,157	32,616,294	(33,962)	32,582,332	(100,825)	FAV
7	BENEFITS	6,740,038	7,156,139	7,156,139	(19,372)	7,136,767	(19,372)	FAV
8	PURCHASED SERVICES	9,450,226	10,909,628	10,627,217	172,743	10,799,960	(109,668)	FAV
9	DEBT SERVICE	3,858,211	2,552,296	2,552,296	0	2,552,296	0	FAV
10	SUPPLIES (INCLUDING UTILITIES)	3,417,128	3,554,998	3,558,801	0	3,558,801	3,803	UNF
11	EQUIPMENT	245,196	274,400	274,400	0	274,400	0	FAV
12	IMPROVEMENTS / CONTINGENCY	137,685	749,000	749,000	0	749,000	0	FAV
13	DUES AND FEES	214,307	229,381	229,381	0	229,381	0	FAV
14	TRANSFER ACCOUNT	1,129,132	0	0	0	0	0	FAV
15	TOTAL EXPENDITURES	55,792,102	58,108,999	57,763,528	119,409	57,882,937	(226,062)	FAV
16	SUBTOTAL	814,751	0	374,570	(112,131)	262,439	262,439	FAV
17	PLUS: CANCELLATION OF PRIOR YEAR'S ENCUMBRANCES	83,853	0	0	0	0	0	FAV
18	DESIGNATED FOR SUBSEQUENT YEAR'S BUDGET:	0	0	0	0	0	0	FAV
19	NET BALANCE / (DEFICIT)	898,604	0	374,570	(112,131)	262,439	262,439	FAV

Column 7: FAV=Favorable Variance

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

**AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES AND EXPENDITURES
FY 2025-2026**

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2024-2025	2025-2026	SEPT 25	CHANGE	OCT 25	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
1	BETHANY ALLOCATION	8,828,986	9,160,226	9,160,226	(147,479)	9,012,747	(147,479)	UNF
1a	PRIOR YEAR CREDIT BETHANY	183,118	0	0		147,479	147,479	
2	ORANGE ALLOCATION	26,964,444	27,533,537	27,533,537	(446,061)	27,087,476	(446,061)	UNF
2a	PRIOR YEAR CREDIT ORANGE	514,596	0	0		446,061	446,061	
3	WOODBIDGE ALLOCATION	18,427,914	20,142,040	20,142,040	(305,064)	19,836,976	(305,064)	UNF
3a	PRIOR YEAR CREDIT WOODBRIDGE	352,967	0	0		305,064	305,064	
4	MEMBER TOWN ALLOCATIONS	55,272,025	56,835,803	56,835,803	0	56,835,803	0	FAV
5	ATHLETICS	26,234	27,000	27,000	0	27,000	0	FAV
6	INVESTMENT INCOME	138,452	60,000	60,000	0	60,000	0	FAV
7	PARKING INCOME	30,967	32,000	32,000	0	32,000	0	FAV
8	RENTAL INCOME	17,181	18,000	18,000	0	18,000	0	FAV
9	TUITION REVENUE	110,560	84,597	117,596	0	117,596	32,999	FAV
10	TRANSPORTATION BOWA AGREEMENT	0	0	0	0	0	0	FAV
11	OTHER REVENUE	323,394	221,597	254,596	0	254,596	32,999	FAV
12	ADULT EDUCATION	5,178	4,900	4,900	278	5,178	278	FAV
13	OPEN CHOICE	0	125,000	125,000	7,000	132,000	7,000	FAV
14	SPECIAL EDUCATION GRANTS	964,016	884,599	884,599	0	884,599	0	FAV
15	TRANSPORTATION INCOME-MAGNET	22,100	22,100	18,200	0	18,200	(3,900)	UNF
16	OTHER STATE GRANTS	991,294	1,036,599	1,032,699	7,278	1,039,977	3,378	FAV
17	INTERGOVERNMENTAL REVENUE	0	0	0	0	0	0	FAV
18	OTHER REVENUE	20,139	15,000	15,000	0	15,000	0	FAV
19	TRANSFER IN	0	0	0	0	0	0	FAV
20	MISCELLANEOUS INCOME	20,139	15,000	15,000	0	15,000	0	FAV
21	TOTAL REVENUES	56,606,852	58,108,999	58,138,098	7,278	58,145,376	36,377	FAV

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

**AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES AND EXPENDITURES
FY 2025-2026**

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2024-2025	2025-2026	SEPT 25	CHANGE	OCT 25	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
1	5111-CERTIFIED SALARIES	25,246,947	26,913,147	26,863,692	(20,650)	26,843,042	(70,105)	FAV
2	5112-CLASSIFIED SALARIES	5,353,231	5,770,010	5,752,602	(13,312)	5,739,290	(30,720)	FAV
3	SALARIES	30,600,178	32,683,157	32,616,294	(33,962)	32,582,332	(100,825)	FAV
4	5200-MEDICARE - ER	428,639	474,989	474,989	0	474,989	0	FAV
5	5210-FICA - ER	343,760	378,210	378,210	0	378,210	0	FAV
6	5220-WORKERS' COMPENSATION	158,586	169,575	169,575	(19,372)	150,203	(19,372)	FAV
7	5255-MEDICAL & DENTAL INSURANCE	4,548,772	4,837,753	4,837,753	0	4,837,753	0	FAV
8	5860-OPEB TRUST	291,313	312,673	312,673	0	312,673	0	FAV
9	5260-LIFE INSURANCE	49,789	56,461	56,461	0	56,461	0	FAV
10	5275-DISABILITY INSURANCE	11,372	15,016	15,016	0	15,016	0	FAV
11	5280-PENSION PLAN - CLASSIFIED	670,604	681,191	681,191	0	681,191	0	FAV
12	5281-DEFINED CONTRIBUTION RETIREMENT PLAN	213,386	183,171	183,171	0	183,171	0	FAV
13	5282-RETIREMENT SICK LEAVE - CERT	0	0	0	0	0	0	FAV
14	5283-RETIREMENT SICK LEAVE - CLASS	0	0	0	0	0	0	FAV
15	5284-SEVERANCE PAY - CERTIFIED	0	0	0	0	0	0	FAV
16	5290-UNEMPLOYMENT COMPENSATION	17,352	15,500	15,500	0	15,500	0	FAV
17	5291-CLOTHING ALLOWANCE	1,912	4,600	4,600	0	4,600	0	FAV
18	5292-TUITION REIMBURSEMENT	4,554	27,000	27,000	0	27,000	0	FAV
19	BENEFITS	6,740,038	7,156,139	7,156,139	(19,372)	7,136,767	(19,372)	FAV
20	5322-INSTRUCTIONAL PROG IMPROVEMENT	81,812	64,200	64,200	0	64,200	0	FAV
21	5327-DATA PROCESSING	130,705	157,949	157,949	0	157,949	0	FAV
22	5330-PROFESSIONAL & TECHNICAL SRVC	2,247,009	2,602,472	2,632,697	0	2,632,697	30,225	UNF
23	5440-RENTALS - LAND, BLDG, EQUIPMENT	104,661	123,327	123,327	0	123,327	0	FAV
24	5510-PUPIL TRANSPORTATION	3,727,958	4,184,788	4,168,327	129,513	4,297,840	113,052	UNF
25	5521-GENERAL LIABILITY INSURANCE	301,337	324,428	322,015	0	322,015	(2,413)	FAV
26	5550-COMMUNICATIONS: TEL, POST, ETC.	91,860	133,134	133,134	0	133,134	0	FAV
27	5560-TUITION EXPENSE	2,694,569	3,198,805	2,905,043	43,230	2,948,273	(250,532)	FAV
28	5590-OTHER PURCHASED SERVICES	70,316	120,525	120,525	0	120,525	0	FAV
29	PURCHASED SERVICES	9,450,226	10,909,628	10,627,217	172,743	10,799,960	(109,668)	FAV

Column 7: FAV=Favorable Variance

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

AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES AND EXPENDITURES
FY 2025-2026

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2024-2025	2025-2026	SEPT 25	CHANGE	OCT 25	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
30	5830-INTEREST	368,978	235,850	235,850	0	235,850	0	FAV
31	5910-REDEMPTION OF PRINCIPAL	3,489,233	2,316,446	2,316,446	0	2,316,446	0	FAV
32	DEBT SERVICE	3,858,211	2,552,296	2,552,296	0	2,552,296	0	FAV
33	5410-UTILITIES, EXCLUDING HEAT	936,901	718,420	722,223	0	722,223	3,803	UNF
34	5420-REPAIRS, MAINTENANCE & CLEANING	798,707	857,352	857,352	0	857,352	0	FAV
35	5611-INSTRUCTIONAL SUPPLIES	322,271	436,097	436,097	0	436,097	0	FAV
36	5613-MAINTENANCE/CUSTODIAL SUPPLIES	178,557	220,450	220,450	0	220,450	0	FAV
37	5620-OIL USED FOR HEATING	67,017	55,260	55,260	0	55,260	0	FAV
38	5621-NATURAL GAS	77,407	99,100	99,100	0	99,100	0	FAV
39	5627-TRANSPORTATION SUPPLIES	171,394	209,500	209,500	0	209,500	0	FAV
40	5641-TEXTS & DIGITAL RESOURCES	156,903	173,164	173,164	0	173,164	0	FAV
41	5642-LIBRARY BOOKS & PERIODICALS	18,632	20,550	20,550	0	20,550	0	FAV
42	5690-OTHER SUPPLIES	246,191	269,241	269,241	0	269,241	0	FAV
43	5695-OTHER SUPPLIES-TECHNOLOGY	443,149	495,864	495,864	0	495,864	0	FAV
44	SUPPLIES (INCLUDING UTILITIES)	3,417,128	3,554,998	3,558,801	0	3,558,801	3,803	UNF
45	5730-EQUIPMENT - NEW	8,199	4,500	4,500	0	4,500	0	FAV
46	5731-EQUIPMENT - REPLACEMENT	66,263	105,617	105,617	0	105,617	0	FAV
47	5732-EQUIPMENT - TECH - NEW	600	26,580	26,580	0	26,580	0	FAV
48	5733-EQUIPMENT - TECH - REPLACEMENT	170,134	137,703	137,703	0	137,703	0	FAV
49	EQUIPMENT	245,196	274,400	274,400	0	274,400	0	FAV
50	5715-IMPROVEMENTS TO BUILDING	67,309	326,000	326,000	0	326,000	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	0	0	0	0	FAV
52	5720-IMPROVEMENTS TO SITES	70,376	173,000	173,000	0	173,000	0	FAV
53	5850-DISTRICT CONTINGENCY	74,500	150,000	150,000	0	150,000	0	FAV
53a	TRSF. FROM CONTINGENCY TO OTHER ACCTS.	-74,500	0	0	0	0	0	FAV
54	IMPROVEMENTS / CONTINGENCY	137,685	749,000	749,000	0	749,000	0	FAV

Column 7: FAV=Favorable Variance

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

**AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES AND EXPENDITURES
FY 2025-2026**

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2024-2025	2025-2026	SEPT 25	CHANGE	OCT 25	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
55	5580-STAFF TRAVEL	28,311	27,377	27,377	0	27,377	0	FAV
56	5581-TRAVEL - CONFERENCES	83,228	85,718	85,718	0	85,718	0	FAV
57	5810-DUES & FEES	102,769	116,286	116,286	0	116,286	0	FAV
58	DUES AND FEES	214,307	229,381	229,381	0	229,381	0	FAV
59	5856-TRANSFER ACCOUNT	1,129,132	0	0	0		0	FAV
60	TOTAL EXPENDITURES	55,792,102	58,108,999	57,763,528	119,409	57,882,937	(226,062)	FAV
61								
Note:	RESTRICTED - RETURN TO TOWNS	898,604						

**AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES & EXPENDITURES BY CATEGORY
FINANCIAL ANALYSIS
FOR THE FISCAL YEAR 2025-2026**



October 2025

2025-2026 FORECAST

OVERVIEW

The projected unspent fund balance for this fiscal year is \$262,439 FAV, previously \$168,327 FAV, which appears on page 1, column 6, and line 19. The unspent funds from fiscal year 2025, \$898,604 will be deducted from the town allocations in March 2026. This is comprised of \$814,751 of FY25 unspent funds and \$83,853 in FY24 unspent encumbrances. The Board may approved 2% of the unspent funds as an end-of-year transfer. The appropriation request to the educational expenditure account will be shown on line 59 of the Excel file if funds are available. The District is legally allowed to transfer with Board approval up to 2% or \$1,162,179 of the current budget if funds become available. The item will be requested at the August 2026 meeting.

REVENUES BY CATEGORY

The projected balance of revenues is **\$36,377 FAV**, previously \$29,099 FAV which appears on page 2, column 6, line 21.

LINE 5 on Page 2: ATHLETICS:

The forecast is based on historical data of State payments. *The forecast is neutral.*

LINE 6 on Page 2: INVESTMENT INCOME:

The forecast is based on historical data of State payments. *The forecast is neutral.*

<u>Month</u>	<u>M&T Bank</u>	<u>State Treasurer's Investment Fund</u>
July 2025	.40%	5.43%
August 2025	.40%	4.49%
Sept 2025	.40%	4.35%
Oct 2025	.40%	4.23%

LINE 7 on Page 2: PARKING INCOME:

The forecast is based on historical data of State payments. *The forecast is neutral.*

LINE 8 on Page 2: RENTAL INCOME:

The forecast is based on historical data of State payments. *The forecast is neutral.*

LINE 9 on Page 2: TUITION REVENUE:

The budget is based on six tuition students, three at reduced employee rates. **Full tuition rate is \$22,442.** The actual tuition charged is higher (\$806 per full rate student than budgeted). Currently, eight tuition students are enrolled, including four at reduced employee rates. *The forecast is \$32,999 FAV including \$3,151 FAV, from the rate change.*

LINE 12 on Page 2: ADULT EDUCATION:

The forecast is based on historical data of State payments. *The forecast is neutral.*

LINE 13 on Page 2: OPEN CHOICE:

The forecast is based on historical data of State payments. *The forecast is \$7,000 FAV, previously neutral. This is based on October 1 enrollment data and expected payments from the State.*

LINE 14 on Page 2: SPECIAL EDUCATION GRANTS:

The current projection is based on budgeted costs for placements and transportation. The budget is based on a 60% reimbursement rate.

LINE 15 on Page 2: TRANSPORTATION INCOME:

The forecast is based on projected State payments and enrollment for magnet school transportation budgeted. 4 less students are attending ECA than budgeted, reducing our reimbursement. *The forecast is \$3,900 UNF, previously \$3,900 UNF.*

LINE 18 on Page 2: OTHER REVENUE:

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

EXPENDITURES BY CATEGORY

The projected yearend balance of expenditures is *\$226,062 FAV, previously \$345,471 FAV* which appears on page 5, column 6, line 60.

LINE 1 on Page 3: 5111-CERTIFIED SALARIES:

The forecast is based on current data. There is still a vacant position. The vacancy is supported by contracting with an outside agency. There were several staff members on unpaid leaves of absences through October. *The forecast is \$70,105 FAV, previously \$49,455 FAV.*

LINE 2 on Page 3: 5112-CLASSIFIED SALARIES:

The forecast is \$30,720 FAV, previously \$17,408 FAV. This is due to staff turnover in technology technicians, nurse, paraeducators and custodians.

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

The forecast is based on budget.

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

The workers' compensation account is forecasted to be budget neutral. *The District received a rebate from the CIRMA's members equity program of \$19,372 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 103.0%, previously 102.5% of budget. No change in the forecast is noted currently since fees are mostly offsetting this overage.***

The forecast projects actual claims and fees of current employees and retirees will be neutral with the budget, however claims are more than the month-to-month forecast. The projected monthly budget is based on an average of five years of claims.

CLAIMS OF CURRENT EMPLOYEES AND RETIREES

MONTH	2025-2026 ACTUAL	2024-2025 BUDGET	VARIANCE	2024-2025 ACTUAL	2023-2024 ACTUAL
<i>JUL</i>	\$ 847,639	\$ 368,077	\$ 479,562	\$ 347,337	\$ 364,829
<i>AUG</i>	\$ 398,153	\$ 608,013	\$ (209,860)	\$ 488,825	\$ 641,037
<i>SEP</i>	\$ 344,933	\$ 485,660	\$ (140,727)	\$ 404,062	\$ 412,377
<i>OCT</i>	\$ 503,432	\$ 477,606	\$ 25,826	\$ 549,988	\$ 508,930
NOV	\$ 489,383	\$ 489,383	\$ -	\$ 458,288	\$ 541,882
DEC	\$ 607,751	\$ 607,751	\$ -	\$ 477,519	\$ 363,042
JAN	\$ 344,031	\$ 344,031	\$ -	\$ 328,754	\$ 220,714
FEB	\$ 286,051	\$ 286,051	\$ -	\$ 382,582	\$ 183,906
MAR	\$ 335,443	\$ 335,443	\$ -	\$ 303,213	\$ 261,829
APR	\$ 365,182	\$ 365,182	\$ -	\$ 401,225	\$ 266,018
MAY	\$ 443,521	\$ 443,521	\$ -	\$ 486,801	\$ 456,890
JUN	\$ 432,806	\$ 432,806	\$ -	\$ 486,018	\$ 369,321
TOTALS	\$ 5,398,326	\$ 5,243,525	\$ 154,801	\$ 5,114,612	\$ 4,590,775

ACTUAL/FORECAST CLAIMS AS A PERCENTAGE OF EXPECTED CLAIMS

2021-2022 ACTUAL	2022-2023 ACTUAL	2023-2024 ACTUAL	2024-2025 FORECAST	2025-2026 FORECAST
97.3%	93.6%	99.5%	104.6%	103.0%

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

MONTH	2024-2025 ACTUAL	2024-2025 BUDGET	VARIANCE	2024-2025 ACTUAL	2023-2024 ACTUAL
<i>JUL</i>	\$ 45,277	\$ 38,265	\$ 7,012	\$ 50,798	\$ 44,555
<i>AUG</i>	\$ 58,223	\$ 74,412	\$ (16,189)	\$ 54,969	\$ 54,176
<i>SEP</i>	\$ 58,040	\$ 54,073	\$ 3,967	\$ 14,743	\$ 53,028
<i>OCT</i>	\$ (26,312)	\$ 59,959	\$ (86,271)	\$ 53,552	\$ 52,666
NOV	\$ 59,397	\$ 59,397	\$ -	\$ 53,061	\$ 53,732
DEC	\$ 62,289	\$ 62,289	\$ -	\$ 51,875	\$ 53,218
JAN	\$ 29,815	\$ 29,815	\$ -	\$ (6,882)	\$ 48,165
FEB	\$ 85,092	\$ 85,092	\$ -	\$ 82,020	\$ 57,785
MAR	\$ 39,994	\$ 39,994	\$ -	\$ (10,286)	\$ (8,744)
APR	\$ 55,700	\$ 55,700	\$ -	\$ 55,644	\$ 46,575
MAY	\$ 58,335	\$ 58,335	\$ -	\$ 55,040	\$ 41,342
JUN	\$ 16,538	\$ 16,538	\$ -	\$ (36,549)	\$ (6,272)
TOTALS	\$ 542,387	\$ 633,867	\$ (91,480)	\$ 417,985	\$ 490,226

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

The forecast is \$19,372 FAV, previously neutral. The District received a member's equity rebate.

LINE 9 on Page 3: 5260-LIFE INSURANCE:

The forecast is neutral.

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 budget..

LINE 16 on Page 3: 5290-UNEMPLOYMENT:

The forecast is based on budget.

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

The forecast is based on budget.

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

The forecast is \$30,225 UNF, previously \$30,225 UNF. A transfer was requested in September for professional services to cover a staffing shortage.

LINE 23 on Page 3: 5440-RENTALS:

The forecast is based on budget.

LINE 24 on Page 3: 5510-PUPIL TRANSPORTATION:

Special Education Transportation will 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 current forecast is \$113,052 UNF, previously \$16,908 UNF.*

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 \$8,860 FAV and Student Accident is \$6,447 UNF. *Account is \$2,413 FAV, previously \$2,413 FAV.*

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

The forecast is based on budget.

LINE 27 on Page 3: 5560-TUITION EXPENSE:

Special Education tuition is under review as student enrollment and needs are not finalized for the start of the year. *The forecast for these accounts is \$250,167 FAV previously \$293,762 FAV. Data changes based on actual student placements and services.*

Tuition for the Vo-Ag schools is \$17,638 UNF, previously \$10,781 UNF.

	FY21-22 ACTUAL	FY21-22 ACTUAL	FY22-23 ACTUAL	FY23-24 ACTUAL	FY24-25 ACTUAL	FY25-26 BUDGET	FY25-26 FORECAST
Sound	3	3	3	3	4	4	<i>5</i>
Trumbull	1	1	3	4	3	3	<i>3</i>
Nonnewaug	9	9	7	8	4	7	<i>5</i>
Emmett O'Brien	0	0	2	2	0	1	<i>4</i>
Common Ground Charter HS	1	1	3	2	0	0	<i>1</i>
Fairchild Wheeler	0	0	0	0	1	0	<i>0</i>
NH Coop Arts	0	0	0	0	1	1	<i>1</i>
Wintergreen Magnet	1	1	0	0	0	0	<i>0</i>
Marine Science Magnet HS	0	0	1	0	0	0	<i>0</i>
Engineering Science Magnet	0	0	0	0	1	0	<i>1</i>

Center for Global Studies	0	0	0	0	0	0	1
Lyman Hall-Vo-AG School	0	0	0	0	1	1	1
Totals	15	15	20	17	15	17	22(22)

ECA is on under budget \$18,002 FAV.

	FY21-22 ACTUAL	FY22-23 ACTUAL	FY23-24 ACTUAL	FY24-25 ACTUAL	FY25-26 BUDGET	FY25-26 FORECAST
ECA	18	19	19	19	19	14(14)

Public (ACES) and private out-of-district placements are \$250,167 FAV, previously \$103,326 FAV, though several placements are not finalized.

	FY21-22 ACTUAL	FY22-23 ACTUAL	FY23-24 ACTUAL	FY24-25 ACTUAL	FY25-26 BUDGET	FY25-26 FORECAST
Public SPED	10	9	8	9	10	10(9)
Private SPED	20	16	19	15	21	16(15)
Totals	30	25	27	24	31	26(24)

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

The 2025-2026 budget for electricity assumes the use of 3,377,000 kilowatt hours at an average price of 0.07988 or a cost of \$622,736 with delivery charges. Forecast is neutral at this time. However, if higher delivery and public benefit charges continue this fiscal year as was incurred in the previous fiscal year, the account will be overbudget. The net metering program credits are now being posted to accounts and should help offset some of the public benefit charges. Year to date public benefit charges are \$45,940 and VNM credits from April 2025 to date are \$31,234.

The budget for propane is \$4,575. *The forecast is neutral.*

The budget for water is \$60,000. *The forecast is neutral.*

Sewer costs are budgeted at \$31,109. At the end of June 2025 we received the new rate structure from the Regional Water Authority. *We expect to be over budget by approximately \$3,803 UNF.*

ELECTRICITY (KILOWATT HOURS)

MONTH	2025-2026 FORECAST	2025-2026 BUDGET	VARIANCE	2024-2025 ACTUAL	2023-2024 ACTUAL
<i>JUL</i>	391,045	305,906	85,139	352,636	275,363
<i>AUG</i>	397,458	335,816	61,642	341,068	339,333
<i>SEP</i>	353,839	306,316	47,523	315,393	295,827
<i>OCT</i>	375,487	269,943	105,544	302,667	250,944
NOV	256,908	256,908	-	264,619	251,734
DEC	252,134	252,134	-	259,154	233,988
JAN	271,152	271,152	-	292,535	271,629
FEB	264,207	264,207	-	268,168	255,916
MAR	255,758	255,758	-	263,087	242,795
APR	267,046	267,046	-	290,631	262,074
MAY	279,618	279,618	-	299,083	288,966
JUN	312,196	312,196	-	340,831	320,107
Totals	3,676,848	3,377,000	299,848	3,589,872	3,288,676

DEGREE DAYS

There are 1221 degree days to date as opposed to 1201 last year.

LINE 34 on Page 4: 5420-REPAIRS & MAINTENANCE: *The forecast is neutral.*

The electronic and science waste disposal is overbudget by \$11,858 UNF. There was a deeper cleanout of custodial, technology and science storage areas this summer. Bethany was over budget by \$6559.45, largely due to the amount of computers and science waste, plus the expired hand sanitizer left over from Covid; Orange was over budget by \$208.50; the high school was over budget by \$5091.00, largely due to the science lab cleanout. No transfer or variance is reported since it is early in the year but a transfer may be needed in this account later in the year.

LINE 35 on Page 4: 5611-INSTRUCTIONAL SUPPLIES: *The forecast is neutral.*

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

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

The budget for natural gas is \$99,100 and the budget for oil is \$2.409 per gallon, and \$52,089 annually or 21,000 gallons. *The forecast is projected neutral.*

LINE 39 on Page 4: 5627-TRANSPORTATION SUPPLIES: *The forecast is neutral.*

LINE 40 on Page 4: 5641-TEXTBOOKS:

The forecast is neutral.

LINE 42 on Page 4: 5690-OTHER SUPPLIES:

The forecast is neutral.

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

The forecast is neutral.

LINE 45 on Page 4: 5730-EQUIPMENT -NEW:

The forecast is projected to be neutral.

LINE 46 on Page 4: 5731-EQUIPMENT -REPLACEMENT:

The forecast is projected to be neutral.

LINE 48 on Page 4: 5733-EQUIPMENT –TECHNOLOGY-REPLACEMENT:

The forecast is neutral.

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.

LINE 52 on Page 4: 5720-FACILITIES SITE IMPROVEMENTS:

The forecast is neutral, however there was sinkhole repair by the cafeteria loading dock for \$6,500 that was not budgeted. This account may need a transfer later in the year.

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.

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

The forecast is neutral.

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

The forecast is 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 \$1,162,179 of the current budget. The item will be presented after the final balance for the FY26 is confirmed at the August/September 2026 meeting.

LINE 61 on Page 5: RESTRICTED: RETURN TO TOWNS:

This line is for the unspent funds from FY25. The *unaudited* amount of unspent funds is \$898,604 FAV and will be credited to the member towns' March allocations. This is comprised of \$814,751 of unspent funds in FY25 and unliquidated encumbrances from FY24 of \$83,853. *The town allocations will be reduced in March 2026.*

APPENDIX A

COST SAVINGS AND EFFICIENCIES FOR FISCAL YEAR 2025-2026

TOTAL ANNUAL SAVINGS TO-DATE OF: \$76,909

\$13,646 Medicaid Claims: The District's reimbursements increased from \$7,400 in 2023 to \$21,046 in 2025. The reimbursement will increase once the funds for annual reports are received (they are received 2 fiscal years later). This is due to efforts of the administrative assistant in the Special Education Department to reach more families and process more data for the District increasing our reimbursement. The Board supported increasing this position from part-time to full-time and this has allowed the time needed to recoup these funds. The funds are used to support the special education program which offsets the general fund budget.

\$10,000 Cable Advisory Grant: Funds will be used to enhance public broadcasting capabilities. The primary focus for both the CAC Grant and the PEGPETIA Grant this year will be to increase the digital signs present at the High School and to begin implementation at the middle schools. The combined grant funds will allow us to offer a new technology through our DEVOS video server called "Learning Path" while also renewing the maintenance plan on it to keep it up to date. Additionally, the grants will allow for some minor improvements to the equipment needed for the TV studio's productions both inside the studio and out in the field.

\$21,138 E-Rate Credits: The District's application for E-Rate credits is submitted. The amount will reflect discounted invoices for the CEN – state provided internet connection.

Electricity: The District entered into a net metering contract. Credits have started to be applied to the account. Credits applied from April 2025 through October are \$31,234.75.

Telephones: The Director of Facilities negotiated a new phone plan for district cell phones and saved \$74 monthly, \$890 annually. Our Network Specialist, along with the Director of Facilities are researching different fax methods and the standard telephone account for alternate solutions that may save additional funds.

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:

- District recognized CQIA Innovation Prize for Fostering a District Culture of Maximizing Cost Savings and Efficiencies
 - [Microsoft Word - EXPENDITURES & REVENUES BY CATEGORY - FINANCIAL ANALYSIS-APRIL 2016 REPORT](#)
- Fiscal Year 2024-2025 - \$168,245
- 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
 - [Finance - Amity Regional School District #5](#)

APPENDIX B

MONTHLY FORECASTS: PURPOSE, METHODOLOGY, HISTORICAL

PURPOSE & METHODOLOGY:

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

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

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. The reimbursement rate can change in mid-year as it did in 2024-2025. The State then added a special appropriation in June, the final month of the fiscal year.

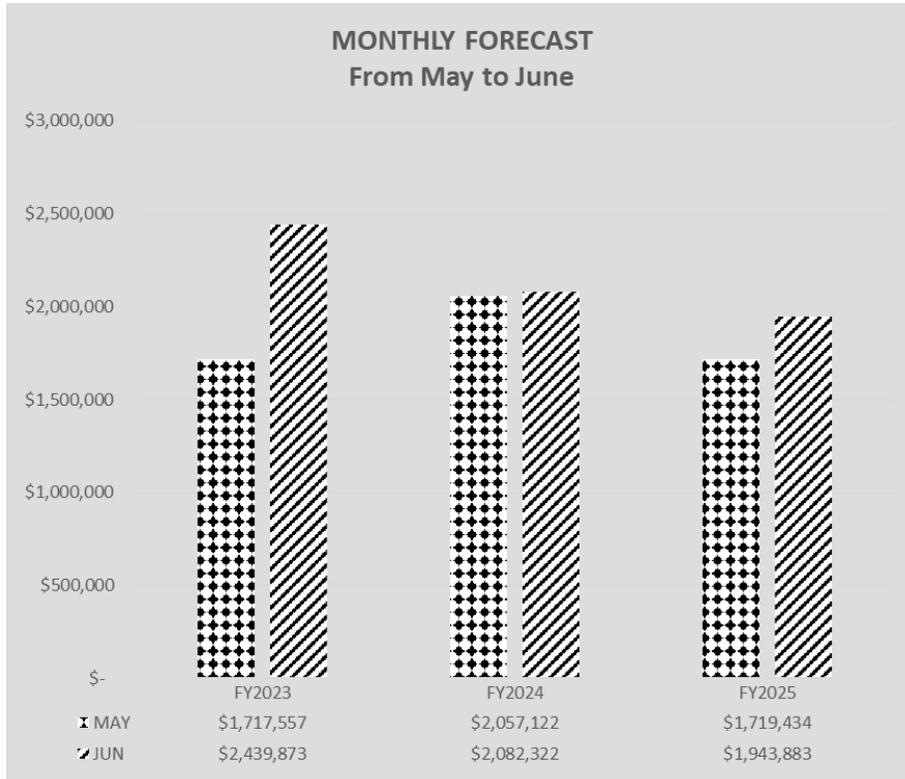
Prudent financial management is necessary. We need to be sure the total expenditures budget is never overspent (and may need to be underspent if revenues are below budget because total expenditures cannot exceed total revenues). It is imperative we ‘hold back’ on spending any of the Contingency Account 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. Some years, such as we did in 2024-25 a soft spending freeze was in place while medical claims were high and special education reimbursement was lowered. Staff prioritized their orders which ultimately contributed to the remaining fund balance. 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.

FY2023:

The audited fund balance is \$1,346,323 assuming an allocation of 2% or \$1,066,995 appropriated to Capital and Nonrecurring Account . The monthly forecast for May 2023 projected a fund balance of \$650,562. The change is **\$695,761 higher than the prior month's forecast**. The major reasons for the increase in the yearend fund balance from one month to the next month were, as follows:

- **\$142,314:** Certified and classified salaries were lower due to the staff turnover and vacancies impacting the District all year. Current staff covered additional classes, additional substitutes and consultants were hired to cover vacant positions.

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

FY2024:

The audited fund balance is \$991,268 assuming an allocation of 2% or \$1,091,054 appropriated to Educational Expenditure Account . The monthly forecast for May 2024 projected a fund balance of \$1,129,780. The change is **\$1,229,566 higher than the prior month's forecast**. The major reasons for the increase in the yearend fund balance from one month to the next month were, as follows:

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

FY2025:

The unaudited fund balance is \$898,604 assuming an allocation of 2% or \$1,129,132 appropriated to Educational Expenditure Account. The monthly forecast for May 2024 projected a fund balance of \$1,018,021. The change is **\$925,862 higher than the prior month's forecast**. The major reasons for the increase in the year-end fund balance from one month to the next month were, as follows:

- **\$275,974:** 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.
- **\$24,282** Benefits were lower mostly due to lower payroll taxes on lower salaries, less unemployment costs (invoices are in the arrears 2 quarters), and tuition reimbursements (not submitted until June per teacher contract).
- **\$178,729** Supplies were lower due to favorable natural gas consumption, unspent instructional and maintenance supplies funds. Key contributors to the maintenance surplus include lower costs on custodial cleaning chemicals and paper goods due to strategic purchasing, new vendor pricing; minimal repair needs across electrical, HVAC, and plumbing systems, which reduced supply and part usage; improved air filtration strategy using longer-lasting, more efficient filters, lowering replacement frequency; upgrades to fan units, transitioning from belt-driven to direct-drive models, which required fewer replacement parts and less maintenance and snow removal equipment experienced minimal breakdowns this winter, resulting in reduced repair and part costs. There was a soft freeze mid-year in response to high medical claims and lower special education reimbursement expected from the State. The medical claims ended at 104% of budget.
- **\$193,314:** Special Education transportation and tuition charges were less than budgeted due to changes in students' services and/or attendance in programs.
- **\$59,598** Transportation for field trips, athletic trips and late runs across the three schools were less than budgeted. Most field trips occurred near the end of the year; athletic contest continue into mid-June and the late runs are billed annually in June, making it difficult to know an exact amount in advance.
- **\$119,099** Purchased Services for legal services were \$37,199 less than budgeted including mediation, expulsion, special education, labor, and contract services; \$3,000 less for actuarial services; payments to speakers was covered by grants of PTSO funding, \$8,800 FAV. Professional services for OSHA training and building use software were underbudget, \$5,315; services for the hearing impaired, instructional program improvement and data processing were \$19,677 less than anticipated. Cyber insurance renewal was \$8,498 underbudget; less was spent on refreshments, printing, shredding, \$18,798; \$2,100 under budget for negative café balances; less postage was spent at year end, \$9,530 FAV; State did not charge for CT SEDs software, \$2,000 FAV; and less security required for meetings, \$5,000 FAV.

- **\$74,500:** The contingency account was not fully expended as expected.

APPENDIX C

RECAP OF 2022-2023

Unspent Encumbrances Balance:

The cancellation of 2021-2022 encumbrances of \$47,518 will be added to the fund balance credited to the member towns in March of 2024. We encumber funds for goods and services received by June 30th but not yet billed. In some cases, the estimated amount encumbered varies from the actual invoice (e.g., utility bill; water bill, pending special education settlements) and we do not need to spend the entire encumbrance.

The audited fund balance for 2022-2023 is \$1,372,878 plus \$1,066,995 designated for capital non-recurring projects. The source of the available funds are described below.

FINANCIAL MANAGEMENT:

\$ 352,350

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

SPECIAL EDUCATION :

\$ 1,764,799

These accounts are extremely difficult to forecast. As examples, special need students can be hospitalized; move into the district or leave the district at any time; withdraw from Amity and enroll in Adult Education. Several students who were budgeted to be outplaced were not for a variety of reasons including moving out of the District or returning to District programs. Some transportation needs were coordinated with the elementary districts to reduce the number of singletons on busses for outplacements. Any one of these events can have a significant impact, positive or negative, on the District's special education expenditures. The Director of Pupil Services has been successful in establishing suitable programs for students within the District and a number of students have returned from outplacement. Programs established in FY22 for the middle school and its counterpart for the high school in the FY23 school year help keep out of district costs down. The Districts receives revenue directly correlated to special education services and that revenue decreased by \$294,610 which is not reflected above.

OTHER:

\$ 287,004

\$430,900 SALARIES (OTHER): "Turnover savings" from replacing teachers and other staff who retired or resigned is over budget and savings from unpaid leaves-of-absence. There were a significant number of vacancies during the year creating variances from the budget. The administration utilized many methods to address the vacancies including

overtime, temporary staff, and outside agencies. Some positions went unfilled for a period of long periods of time despite our recruitment efforts. More in-house teaching substitutes were hired which reduced our costs with an outside agency and provided more stability. An outside agency was utilized to cover vacant para positions. The District was not fully staffed the entire year and the many vacancies resulted in a surplus, \$676,158. A portion of these funds were transferred to cover outside consultants to cover services, a portion of the funds were utilized in hiring more bench (internal) subs rather than using an outside agency, (\$241,695) and some funds remained unspent.

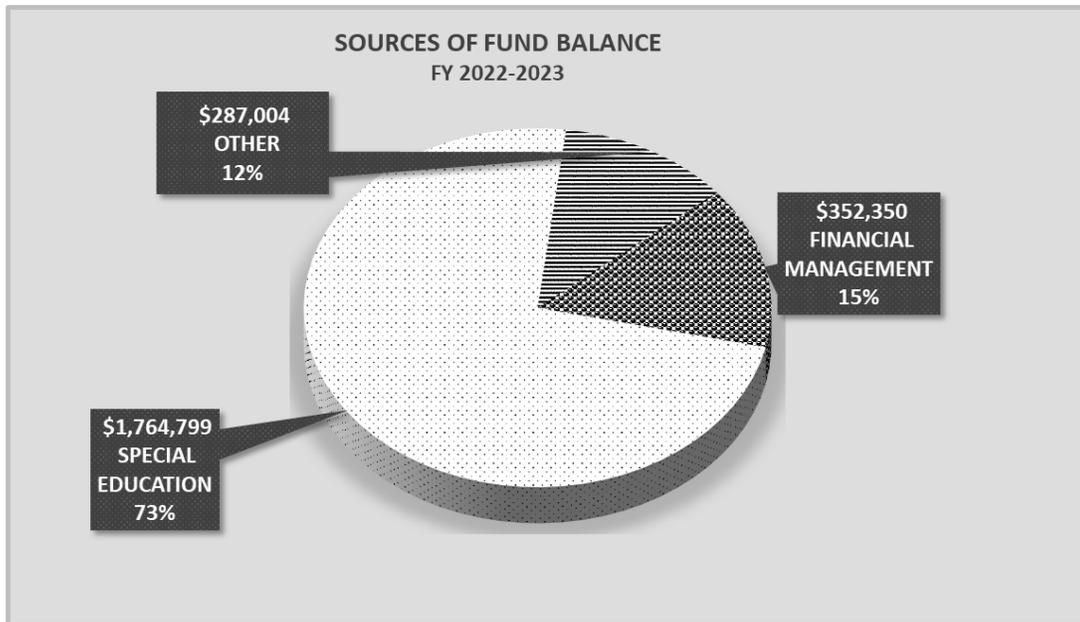
\$103,184 MEDICAL: The medical account was under budget \$103,184 due to the high staff turnover.

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

\$41,328 STAFF TRAVEL, CONFERENCES AND DUES & FEES (OTHER): Many conferences are held virtually as well as some in-district meetings. This results in lower registration fees and travel costs. Several students were award scholarships to attend conferences and contests offsetting the entrance fees.

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

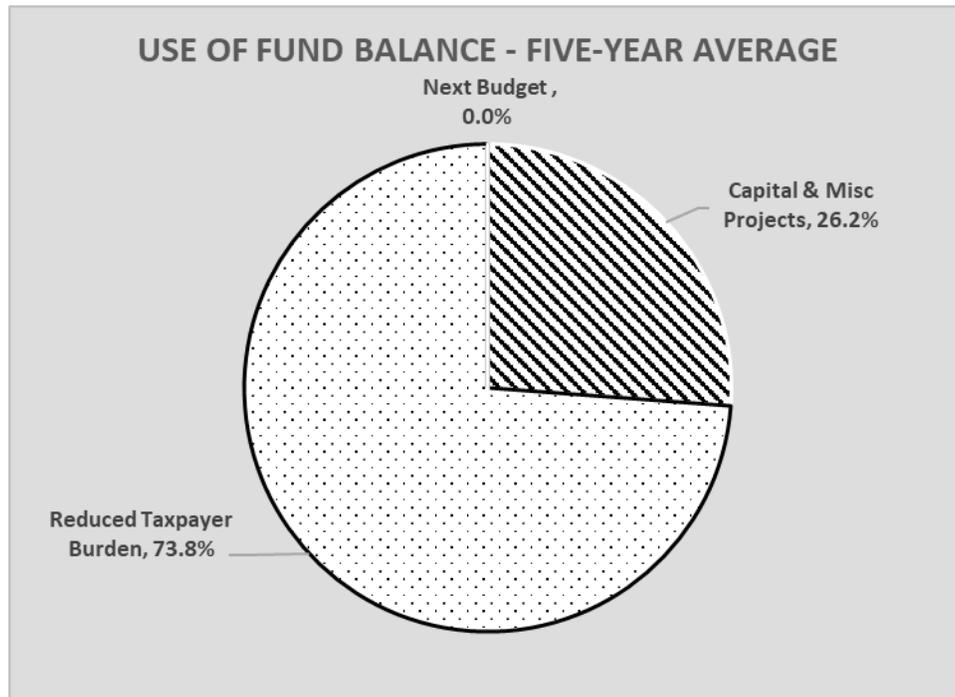
The primary sources of the fund balance are shown graphically below:



The use of the fund balance is proposed as follows:

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

The uses of the fund balance are shown graphically below:



Unspent Funds:

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

APPENDIX D

RECAP OF 2023-2024

Unspent Encumbrances Balance:

The cancellation of 2022-2023 encumbrances of \$59,412 were added to the fund balance credited to the member towns in March of 2025. We encumber funds for goods and services received by June 30th but not yet billed. In some cases, the estimated amount encumbered varies from the actual invoice (e.g., utility bill; water bill, pending special education settlements) and we do not need to spend the entire encumbrance.

The audited fund balance for 2023-2024 is \$991,628 plus \$1,091,054 designated for capital projects. The source of the available funds are described below.

FINANCIAL MANAGEMENT:

\$ 323,979

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

SPECIAL EDUCATION:

\$ 295,125

These accounts are extremely difficult to forecast. As examples, special need students can be hospitalized; move into the district or leave the district at any time; withdraw from Amity and enroll in Adult Education. Several students who were budgeted to be outplaced were not for a variety of reasons including moving out of the District or returning to District programs. Some transportation needs were coordinated with the elementary districts to reduce the number of singletons on busses for outplacements. Any one of these events can have a significant impact, positive or negative, on the District's special education expenditures. The Director of Pupil Services has been successful in establishing suitable programs for students within the District and a number of students have returned from outplacement. Programs established in District in the past 3 years help keep out of district costs down. The Districts receives revenue directly correlated to special education services and that revenue decreased by \$153,489 which is not reflected above.

OTHER:

\$1,463,218

\$470,174 SALARIES (OTHER): "Turnover savings" from replacing teachers and other staff who retired or resigned is over budget and savings from unpaid leaves-of-absence. There were a significant number of vacancies during the year creating variances from the budget. The administration utilized many methods to address the vacancies including overtime, temporary staff, and outside agencies. Some positions went unfilled for long periods of time despite our recruitment efforts. More in-house teaching substitutes were hired which reduced our costs with an outside agency and provided more stability. An

outside agency was utilized to cover vacant para positions. Turnover savings were exceeded by \$284,218 and leave of absences were \$185,956.

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

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

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

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

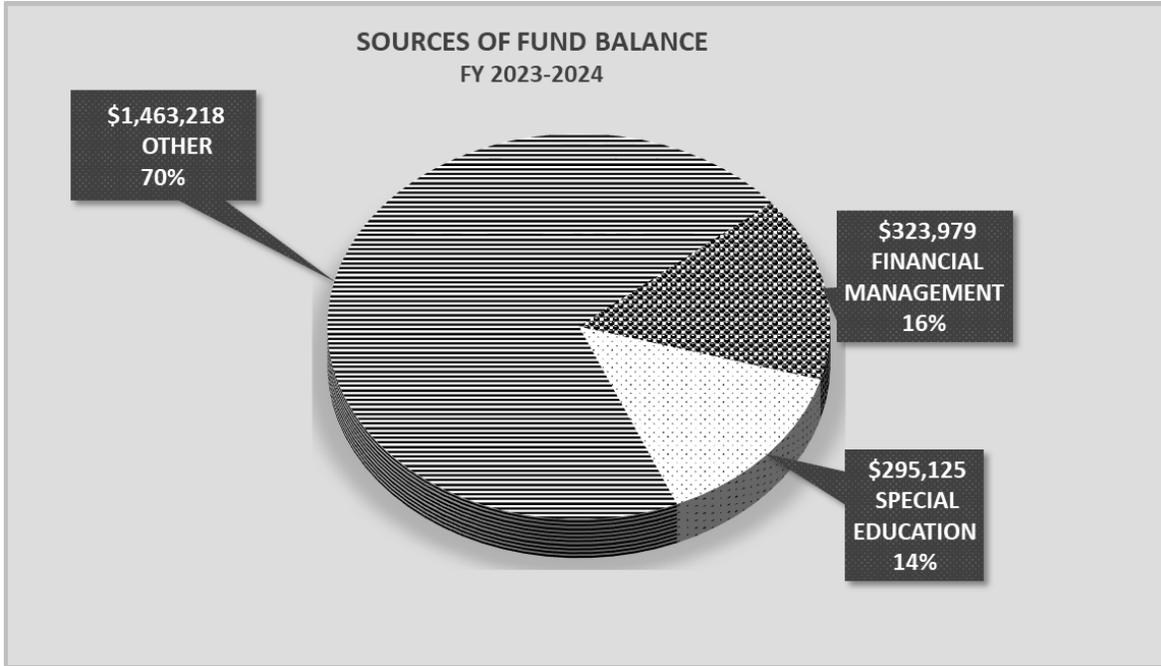
\$63,947 UTILITIES: Electricity, natural gas and oil were all under budget due to a mild winter and cooler spring.

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

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

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

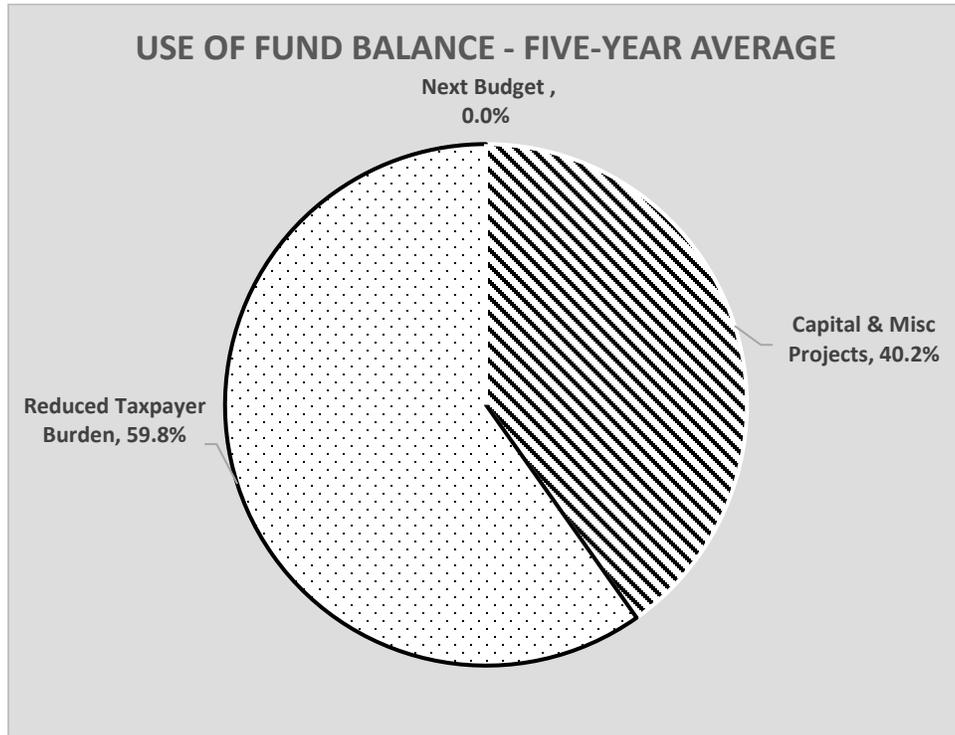
The primary sources of the fund balance are shown graphically below:



The use of the fund balance is proposed as follows:

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

The uses of the fund balance are shown graphically below:



Unspent Funds:

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

APPENDIX E

RECAP OF 2024-2025

Unspent Encumbrances Balance:

The cancellation of 2023-2024 encumbrances of \$83,853 will be subtracted from the Towns' March 2026 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 unaudited fund balance for 2024-2025 is \$814,751 plus \$1,129,132 designated for educational expenditures (capital projects). The source of the available funds are described below.

FINANCIAL MANAGEMENT:

\$ 311,848

Our efforts to foster a District culture of finding cost savings and efficiencies has been successful producing savings of \$168,245. Grant money was applied for and awarded to offset the cost of the CEN for savings of \$21,138. \$62,223 in maintenance supply orders was saved by switching vendors, improved products, and fewer parts needed for repairs. \$28,000 was saved by work done by in-house staff rather than hiring contractors. \$81,380 was saved on instructional supplies and textbooks as department leaders negotiated favorable pricing or used alternate and less expensive resources.

SPECIAL EDUCATION (NET)

\$ 551,141

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. 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 buses for outplacements. Any one of these events can have a significant impact, positive or negative, on the District's special education expenditures. Transportation costs were lower by \$188,761 including the reduced cost for a centralized bus to the technical schools, \$28,168 favorable. 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. The State lowered the reimbursement rate to 59% but was awarded an additional \$168,904 in June to net a favorable \$70,088 in special education revenue. This is included in the total above.

OTHER:

\$ 1,080,894

\$349,930 CERTIFIED 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 time despite our recruitment efforts. More in-house teaching substitutes reduce our costs with an outside agency and provided more stability. An outside agency was utilized to cover vacant para positions. 6th period coverages are down year over

year, \$114,000 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. Vacancies for some student activities \$19,663 FAV and coaching positions were \$21,264 FAV. 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, \$21,000 FAV. There was approximately \$129,000 FAV in unpaid leaves.

\$301,925 CLASSIFIED SALARIES (OTHER): 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 \$138,000 FAV, previously \$48,222 FAV. Forecast for all accounts are \$301,925 FAV, previously \$172,775 FAV. Overtime costs were \$18,000 FAV, substitute costs were \$20,000 FAV, inventory and student help desk costs were down \$48,000, There is a significant turnover in paraeducators, several custodians and secretaries, creating gaps in filling positions. Some substitutes, particularly paraeducators have been contracted through outside agencies and/or grant funding was utilized to cost salaries; \$27,505 FAV.

\$88,451 BENEFITS (OTHER): Payroll taxes were under budget \$43,062 since salaries were not fully expended. Workers' compensation premium was less than budget \$7,232 FAV, life, disability and medical insurance were all under budget due to turnover and vacancies, \$41,243. Tuition reimbursement, a new contractual benefit was under budget \$22,446. These items were offset by higher defined contributions and unemployment costs.

\$41,258 PURCHASED SERVICES (OTHER): The position for cybersecurity was outsource which was \$83,694 over budget. This is offset by savings on a student device lease agreement of \$25,702 FAV; fewer interns available than budgeted, \$54,500 FAV; lower costs for specialized special education services (nursing, speech, OT/PT) \$46,000 FAV. Net for the account is \$51,123 FAV There is \$7,905 less in rentals. Principals' office rentals (tables, chairs, tents for events) were down \$3,800. Special education facilities rentals were \$6,850 lower while athletic rentals were up \$2,430.

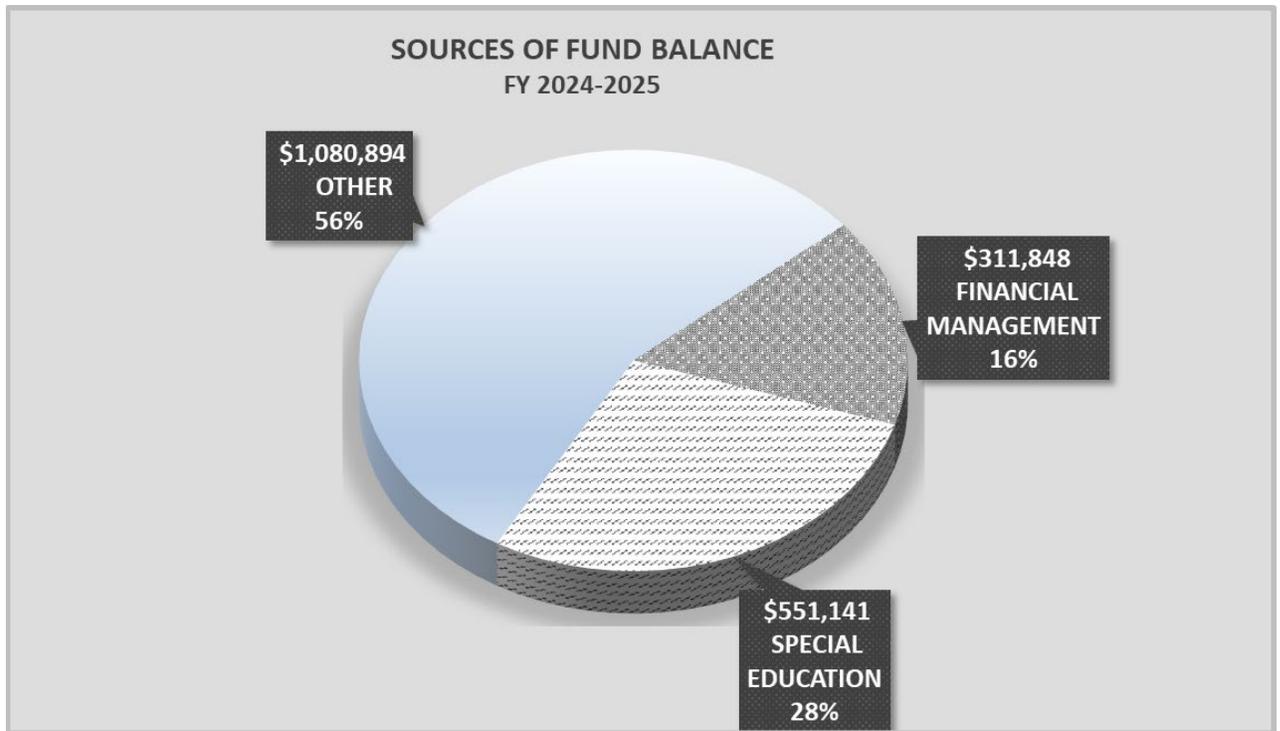
\$42,256 SUPPLIES (OTHER): Instructional supplies are \$63,000 under budget, other supplies are \$11,105 under budget, transportation fuel was under budget \$9,519 and technology supplies are \$13,796 under budget. There was a soft freeze mid-year in response to high medical claims and lower special education reimbursement expected from the State which likely contributed to less spending. These savings were offset by higher electricity costs.

\$59,598 STUDENT TRANSPORTION (OTHER): Transportation costs were lower by \$31,430 for athletic trips, field trips and late runs. There was a reduced cost for a centralize bus to the technical schools, \$28,168.

\$150,600 TECHNICAL AND VOCATIONAL TUITION (OTHER): The State enacted new legislation reducing the tuition for the local board of educations. This change occurred after the budget was set.

\$78,452 INVESTMENT INCOME (OTHER): Investment income was higher than budgeted by \$78,452. It is difficult to predict the interest that will be earned given the fund balance is not known during the budget process.

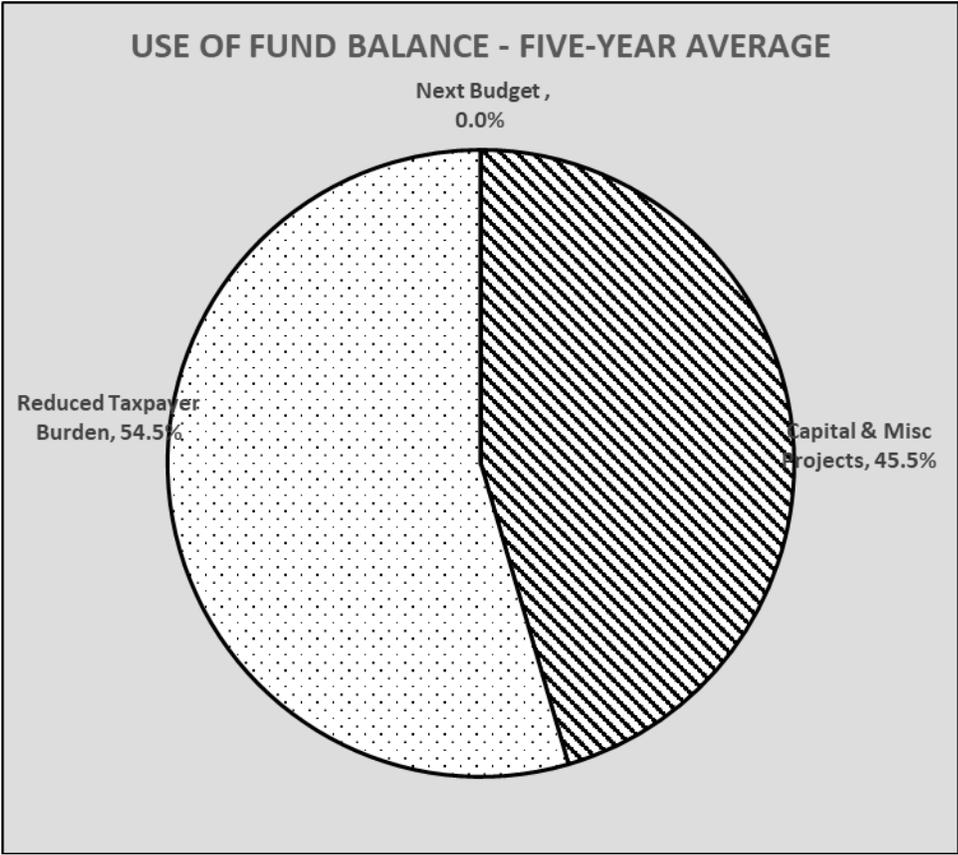
The primary sources of the fund balance are shown graphically below:



The use of the fund balance is proposed as follows:

1. **\$1,129,132 - 2.0% proposed** designation to Educational Expenditure Reserve
2. **\$814,751** – Reduced Towns’ allocation payments in March 2026

The uses of the fund balance are shown graphically below:



Carry Over Funds:

The Board of Education may approve 2.0% or \$1,129,132 of the FY25 surplus transferred to the Educational Expenditure Reserve, the unaudited balance is \$898,604. The FY24 unspent encumbrances of \$83,853 and unspent funds, \$814,751 from FY25 will be subtracted from the Towns’ March 2026 allocation payments.

Amity Regional School District No. 5 - Budget Transfers 2025-2026

MONTH/YR	JNL#	ACCOUNT NUMBER & DESCRIPTION	AMOUNT	DESCRIPTION
JUL				
Jul-25	53	1 -05-14-2350-5695 SOFTWARE	\$ (60.00)	TURN IT IN COVERAGE
Jul-25	53	1 -03-11-1005-5695 SOFTWARE	\$ 60.00	TURN IT IN COVERAGE
Jul-25	127	1 -03-11-3202-5330 PROFESSIONAL & TECH SRVC	\$ (680.00)	Hudl Price Increase
Jul-25	127	1 -03-11-3202-5590 OTHER PURCHASED SERVICES	\$ 680.00	Hudl Price Increase
AUG				
Aug-25	5	1 -02-14-2350-5695 SOFTWARE	\$ 60.00	Blookelt On-Line Subscription
Aug-25	5	1 -02-11-1016-5611 INSTRUCTIONAL SUPPLIES	\$ (60.00)	Blookelt On-Line Subscription
Aug-25	6	1 -05-14-2350-5695 SOFTWARE	\$ 1,000.00	Final Forms price increase
Aug-25	6	1 -03-11-3202-5690 OTHER SUPPLIES	\$ (1,000.00)	Final Forms price increase
Aug-25	12	1 -01-11-1009-5611 INSTRUCTIONAL SUPPLIES	\$ (60.00)	PURCHASE DELTAMATH
Aug-25	12	1 -01-14-2350-5695 SOFTWARE	\$ 60.00	PURCHASE DELTAMATH
Aug-25	13	1 -01-11-1014-5611 INSTRUCTIONAL SUPPLIES	\$ (1.00)	CCSS MEMBERSHIP FEE SHORTAGE
Aug-25	13	1 -01-11-1014-5810 DUES & FEES	\$ 1.00	CCSS MEMBERSHIP FEE SHORTAGE
Aug-25	58	1 -03-11-1009-5695 SOFTWARE	\$ 2,900.00	online textbooks-MATH XL
Aug-25	58	1 -03-11-1009-5641 TEXTS & DIGITAL RESOURCES	\$ (2,900.00)	online textbooks-MATH XL
Aug-25	74	1 -02-11-1013-5611 INSTRUCTIONAL SUPPLIES	\$ (12.00)	KAHOOT
Aug-25	74	1 -02-14-2350-5695 SOFTWARE	\$ 12.00	KAHOOT
Aug-25	98	1 -05-13-2213-5611 INSTRUCTIONAL SUPPLIES	\$ (87.00)	birth cert translation
Aug-25	98	1 -05-13-2213-5590 OTHER PURCHASED SERVICES	\$ 87.00	birth cert translation
SEPT				
Sep-25	13	1 -02-1-2220-5330 PROFESSIONAL & TECH SRVC	\$ (1,050.00)	Replace printhead pstr printer
Sep-25	13	1 -02-1-2220-5420 REPAIRS & MAINTENANCE	\$ 1,050.00	Replace printhead pstr printer
Sep-25	80	1 -01-11-1005-5611 INSTRUCTIONAL SUPPLIES	\$ (59.00)	COVER NCTE MEMBERSHIP
Sep-25	80	1 -01-11-1005-55810 DUES & FEES	\$ 59.00	COVER NCTE MEMBERSHIP
Sep-25	99	1 -04-12-1200-5330 PROFESSIONAL & TECH SRVC	\$ 2,200.00	SOS RENEWAL SY 2025-2026
Sep-25	99	1 -04-12-1203-5330 PROFESSIONAL & TECH SRVC	\$ (2,200.00)	SOS RENEWAL SY 2025-2026
Sep-25	102	1 -02-13-2220-5642 TEXTS & DIGITAL RESOURCES	\$ (544.00)	BOOKBREAK MEMBERSHIP
Sep-25	102	1 -02-13-2220-5690 OTHER SUPPLIES	\$ (544.00)	BOOKBREAK MEMBERSHIP
Sep-25	102	1 -02-13-2220-5330 PROFESSIONAL & TECH SRVC	\$ 1,088.00	BOOKBREAK MEMBERSHIP
Sep-25	103	1 -01-13-2220-5611 INSTRUCTIONAL SUPPLIES	\$ (38.00)	BOOKBREAK MEMBERSHIP
Sep-25	103	1 -01-13-2220-5330 PROFESSIONAL & TECH SRVC	\$ 38.00	BOOKBREAK MEMBERSHIP
Sep-25	151	1 -02-13-2220-5642 TEXTS & DIGITAL RESOURCES	\$ (185.00)	CONN. LIB. ASSOC. MEM. DUES
Sep-25	151	1 -02-13-2220-5810 DUES & FEES	\$ 185.00	CONN. LIB. ASSOC. MEM. DUES
Sep-25	162	1 -02-13-2220-5810 DUES & FEES	\$ (40.00)	NON FICTION BOOKS FOR MC
Sep-25	162	1 -02-13-2220-5690 OTHER SUPPLIES	\$ (238.00)	NON FICTION BOOKS FOR MC
Sep-25	162	1 -02-13-2220-5642 TEXTS & DIGITAL RESOURCES	\$ 278.00	NON FICTION BOOKS FOR MC
OCT				
Oct-25	4	1 -01-13-2400-5690 OTHER PURCH SERVICES	\$ (1,150.00)	REMARKABLE TABLET
Oct-25	4	1 -01-13-2400-5731 EQUIPMENT REPLACEMENT	\$ (550.00)	REMARKABLE TABLET
Oct-25	4	1 -01-14-2350-5732 TECHNOLOGY EQUIP REPLACE	\$ 1,700.00	REMARKABLE TABLET
Oct-25	15	1 -04-12-2151-5330 PROFESSIONAL & TECH SRVC	\$ (2,969.00)	VOAG TRANSPORTATION COSTS
Oct-25	15	1 -05-14-2700-5512 TRANSPORTATION VOAG	\$ 2,969.00	VOAG TRANSPORTATION COSTS
Oct-25	16	1 -04-12-2151-5330 PROFESSIONAL & TECH SRVC	\$ (1,501.00)	ECA TRANSPORTATION COSTS
Oct-25	16	1 -05-14-2700-5515 TRANSPORTATION ECA	\$ 1,501.00	ECA TRANSPORTATION COSTS

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



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

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

To: Jennifer Byars, Ed. D., Superintendent of Schools
 From: Theresa Lumas, Director of Finance and Administration
 Re: Budget Transfers over \$3,000
 Date: November 5, 2025

Facilities:

The light board that controls the panel of lights in the Brady Center failed on November 4th. There were no lights that could be turned on in the Brady center. The light board is approximately 30 years old. It was repaired as much as possible this past spring. However there are no parts available for replacement. A technician brought a loaner board to temporarily operate the lights in the Brady Center. The technician also took our board back to attempt a more stable repair. The system is antiquated working on Windows 2000 and a floppy disk setup. New light boards will not work with the outdated light panel. Both a new board and light panel need to be ordered and installed in order to utilize the Brady Center with any certainty of having functioning lights. The Brady Center is used for daily school activities as well as upcoming performances in the music and drama departments. The long-range plan for the Brady Center includes transitioning to LED lights. The control board and light panel that we will look to purchase will be with the long-range plan of LED lights in mind. The request is for a transfer to make a purchase up to the bid threshold of \$20,000. If the purchase exceeds the threshold, we will look to utilize a consortium bid, prepare a bid or if the temporary fix fails, an emergency purchase. The request is for a transfer from contingency to the high school equipment replacement account.

Motions:

For the Amity Finance Committee:

Recommend the Amity Board of Education approve...

For the Amity Board of Education:

Move to approve this transfer for a light board and panel to operate the lights in the Brady Center.

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
05-15-0000-5850	Contingency	\$19,999	
03-14-2600-5731	Equipment Replacement		\$19,999

Finance:

A section of Geometry was added at Amity Middle School -Bethany. This section was not budgeted for and is being covered by a teacher taking a 6th class assignment. The District is partnering with UCONN for an intern who will be paid for part of the year. Extra summer work days were needed for the high school counselors to complete registration appointments.

Motions:

For the Amity Finance Committee:

Recommend the Amity Board of Education approve...

For the Amity Board of Education:

Move to approve this transfer for salary expenses and intern services.

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
01-11-1009-5111	Certified Salaries	\$15,237	
05-15-1026-5111	Certified Salaries	\$10,200	
03-15-2601-5111	Certified Salaries	\$4,000	
01-13-2400-5330	Professional Technical Services		\$14,000
02-13-2400-5330	Professional Technical Services		\$11,437
03-13-2400-5330	Professional Technical Services		\$ 4,000

Instruction

Student Nutrition and Physical Activity (School Wellness Policy)

Student wellness, including good nutrition and physical activity, shall be promoted in the district's educational program, school activities, and meal programs. **In accordance with federal and state law, it is the policy of the Amity Regional School District No. 5 (District) Board of Education (Board) to provide students access to healthy foods and beverages; provide opportunities for developmentally appropriate physical activity; and require all meals served by the District meet or exceed the federal nutritional guidelines issued by the U.S. Department of Agriculture and the "Connecticut Nutrition Standards for Foods in Schools," whichever are greater.** This policy shall be interpreted consistently with Section 204 of the Healthy, Hunger-Free Kids Act of 2010 (Public Law 111-296).

In developing goals for nutrition promotion and education, physical activity, and other school-based activities that promote student wellness, the District will, as required, review and consider evidence-based strategies and techniques.

Goals for Nutrition **Promotion and Education**

The goals for addressing nutrition education include the following:

- Schools will support and promote good nutrition for students consistent with applicable federal and state requirements and guidelines.
- Schools will foster the positive relationship between good nutrition, physical activity, and the capacity of students to develop and learn.
- **Nutrition education will be part of the District's comprehensive ~~middle-school standards-based school~~ health education curriculum and will be integrated into other ~~high school~~ classroom content areas, as appropriate. Schools will link nutrition education activities with existing coordinated health programs or other comparable comprehensive school health promotion frameworks.**

Goals for Physical Activity

The goals for addressing physical activity include the following:

- Schools will support and promote an active lifestyle for students.
- Physical education will be taught in grades 7-11 and shall include a standards-based, developmentally planned and sequential curriculum that fosters the development of movement skills, enhances health-related fitness, increases students' knowledge, offers direct opportunities to learn how to work cooperatively in a group setting, and encourages healthy habits and attitudes for a healthy lifestyle.
- Unless otherwise exempted, all students will be required to engage in the District's physical education program.
- **Walking and bicycling to schools, where safe to do so, are supported by the Board.**

Goals for Social-Emotional Wellness

Instruction

Student Nutrition and Physical Activity (**School Wellness Policy**)

- A comprehensive, school-wide system of social-emotional learning and behavioral supports will be offered to all students grades 7-12.
- Research based programs that support social-emotional development will be implemented and provided to all students grades 7-12.

Nutrition Guidelines for Foods Available in Schools

Students will be offered and schools will promote nutritious food choices consistent with the current Dietary Guidelines for Americans and My Plate, published jointly by the U.S. Department of Health and Human Services and the Department of Agriculture, and guidelines promulgated by the Connecticut Department of Education ("Connecticut Nutrition Standards for Foods in Schools") in addition to federal and state statutes.

The focus is on moderating calories, limiting fats, sodium and sugars and increasing consumption of nutrient-rich foods such as fruits, vegetables, whole grains, low-fat dairy, lean meats and legumes. In addition, in order to promote student health and reduce childhood obesity, the Superintendent or designee shall establish such administrative procedures to control food and beverage sales that compete with the District's nonprofit food service in compliance with the Child Nutrition Act. The District shall prohibit the sale of foods of minimal nutritional value as defined by the U.S. Department of Agriculture and will ensure that all foods sold to students separately from school meals meet the Connecticut Nutrition Standards. All beverages sold to students on school premises will be healthy choices that meet the requirements of state statute and USDA beverage requirements.

All sources of food sales to students at school must comply with the "Connecticut Nutrition Standards for Food in Schools" including, but not limited to, cafeteria a la carte sales, vending machines, school stores and fundraisers. The District shall ensure that all beverages sold to students comply with the requirements of state statute and USDA beverage requirements. The stricter requirements where different between the state and federal regulations must be followed. The District shall ensure compliance with allowable time frames for the sale of competitive foods as specified by state law.

Reimbursable School Meals

Reimbursable school meals served shall meet, at a minimum, the nutrition requirements and regulations for the National School Lunch Program and/or School Breakfast Program.

Marketing

Any foods and beverages marketed or promoted to students on the school campus during the school day will meet or exceed the USDA "Smart Snacks in School" nutrition standards. Food and beverage marketing is defined as advertising and other promotions in schools. Food and beverage marketing often includes oral, written, or graphic statements made for the purpose of promoting the sale of a food or beverage product made by the producer, manufacturer, seller or

Instruction

Student Nutrition and Physical Activity (School Wellness Policy)

any other entity with a commercial interest in the product. As the District/School Nutrition Services/Athletic Department/PTSO reviews existing contracts and considers new contracts, equipment and product purchasing (and replacement) decisions should reflect the applicable marketing guidelines established by the District wellness policy.

Monitoring

The Board designates the Superintendent or their designee to ensure compliance with this policy and its administrative regulations. They are responsible for retaining all documentation of compliance with this policy and its regulations, including, but not limited to, each school's three-year assessment and evaluation report and this wellness policy and plan. The Superintendent will also be responsible for public notification of the three-year assessment and evaluation report, including any updates to this policy made as a result of the Board's three-year assessment and evaluation.

The District shall develop a plan designed to achieve the involvement requirements in the development, implementation, monitoring, and assessment of this policy.

The Superintendent or designee shall provide periodic implementation data and/or reports to the Board concerning this policy's implementation sufficient to allow the Board to monitor and adjust the policy. The District, as required, will retain records and documents pertaining to the wellness policy which shall include the written school wellness policy, documentation demonstrating compliance with community involvement requirements, documentation of the triennial assessment of the wellness policy and documentation to demonstrate compliance with the annual public notification requirement.

Community Input

The Superintendent or designee will provide opportunities and invite suggestions and comments concerning the development, implementation, periodic review and improvement of the school wellness policy from community members, including parents, students, and representatives of the school food authority, teachers of physical education, school health professionals, members of the Board of Education, school administrators, and the public. This is best achieved through the establishment of a standing wellness committee, with membership as listed above. Efforts shall be made to improve community involvement.

Evaluation of Wellness Policy

In an effort to measure the implementation of this policy, the Board of Education designates the ~~Director of Curriculum~~ Assistant Superintendent as the District Wellness Committee Chairperson who will be responsible for ensuring that each school meets the goals outlined in this policy. To ensure continuing progress, the District will evaluate implementation efforts and their impact on students and staff at least every three years.

The District will make available to the public an assessment of the implementation, including the extent to which the schools are in compliance with policy and a description of the progress being made in attaining the goals of this policy.

Policy Updated:

AMITY REGIONAL SCHOOL DISTRICT NO. 5
Woodbridge, Connecticut

Instruction

Student Nutrition and Physical Activity (School Wellness Policy)

(cf. 3542 – Purpose and Facilities: Food Service)

(cf. 3542.33 – Food Sales Other Than National School Lunch Program)

(cf. 3452.45 - Vending Machines)

Legal Reference: Connecticut General Statutes

10-16b Prescribed courses of study.

10-215 Lunches, breakfasts and the feeding programs for public school children and employees.

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

10-215a Non public school participation in feeding program.

10-215b Duties of state board of education re: feeding programs.

10-216 Payment of expenses.

10-215e Nutrition standards for food that is not part of lunch or breakfast program.

10-215f Certification that food meets nutrition standards.

10-221o Lunch periods. Recess.

10-221p Boards to make available for purchase nutritious, low-fat foods.

10-221q Sale of beverages.

Regulations of Connecticut State Agencies

10-215b-1 Competitive foods.

10-215b-23 Income from the sale of food items.

National School Lunch Program and School Breakfast Program; Competitive Food Services. (7 CFR Parts 210.11 and 220.12,)

The Child Nutrition and WIC Reauthorization Act of 2004, Public Law 108-265

Instruction

Student Nutrition and Physical Activity (School Wellness Policy)

Nutrition Standards in the National School Lunch and School Breakfast Programs, 7 CFR Parts 210 & 220

Healthy, Hunger-Free Kids Act of 2010, P.L. 111-296, 42 U.S.C. 1751

Child Nutrition Act of 1966 (as amended by P.L. 108-269, July 2, 2004)

School Breakfast Program, 7 C.F.R. Part 220 (2006)

National School Lunch Program or School Breakfast Program: Nutrition Standards for All Foods Sold in School (Federal Register, Vol. 78, No. 125, June 28, 2013)

Child Nutrition Programs: Flexibilities for Milk, Whole Grains and Sodium Requirements (Federal Register, Vol. 83, No. 238, December 12, 2018)

Local School Wellness Policy Requirements, 42 U.S.C. 1758b

Instruction

Library Material Review and Reconsideration

The Amity Regional School District No. 5 (District) Board of Education (Board) understands that, on occasion, a member of the school community will wish to lodge a complaint against instructional material used in the classroom or available in the school library/media center. Consideration of requests to reconsider and remove material, displays, or student programs is limited to individuals with a vested interest. An individual with a vested interest may challenge any library and other educational material, display, or student program by initiating a review of such material via the submission of a request for reconsideration form.

The Board subscribes to the Library Bill of Rights (AASL). In evaluating a book or other instructional material, it shall be judged in its entirety and not on isolated pages or parts. Controversial topics shall not in themselves require automatic rejection of the material considered. No library and other educational material, display, or program shall be removed from library media centers, or programs be cancelled, because of the origin, background or viewpoints expressed in such material, display or program, or because of the origin, background or viewpoints of the creator of such material, display or program. Library and other educational materials, displays, and student programs shall only be excluded for legitimate pedagogical purposes or for professionally accepted standards of collection maintenance practices as adopted in the collection development and maintenance policy or the display and program policy.

Until a final decision is made by the review committee, any library and other educational material being challenged shall remain available in the school library media center according to such material's catalog record and be available for a student to reserve, check out, or access.

A school district may consolidate any requests for review and reconsideration of the same challenged library and other educational material. Once a decision has been made by the review committee on any library and other educational material, such material cannot be subject to a new request for review and reconsideration for a period of three years.

The Board will review and update this policy as necessary every five years.

Definitions

"Library Resource and other educational material" means any material belonging to, on loan to or otherwise in the custody of a school library media center, including, but not limited to, nonfiction and fiction books, magazines, reference books, supplementary titles, multimedia and digital material, software, and other material not required as part of classroom instruction.

"School library staff member" means a school library media specialist, school librarian, any certificated or non-certificated staff member whose assignment is in the school library or any individual carrying out or assisting with the functions of a school library media specialist or school librarian.

Instruction

Library Material Review and Reconsideration

"Individual with a vested interest" means any school staff member employed by the Board, a parent or guardian of a student currently enrolled in a school at the time a reconsideration form is filed, or any student currently enrolled in the school at the time a reconsideration form is filed.

"Remove" means deliberately taking library material out of a library's collection. **"Remove"** does not include the process of clearing such collection of any materials that are no longer useful.

Material Review and Reconsideration Procedure

The Board of Education has established the following procedure for addressing complaints regarding the utilization of library and other educational materials:

1. Individuals with a vested interest may initiate the review or reconsideration of any library and other educational materials, display, or student program by submitting a request for reconsideration form to the principal of the school in which the library and other educational materials are being challenged.
2. The Principal, or the Principal's designee, shall promptly forward the request for reconsideration to the Superintendent of Schools for the school district.
3. The Assistant Superintendent, shall appoint a review committee consisting of:
 - a. The Assistant Superintendent;
 - i. The Assistant Superintendent shall serve as the superintendent's designee, the committee chair, and the spokesperson for the committee at all meetings and before the Board of Education when decisions are made.
 - b. The Principal of the school in which the library and other educational material is being challenged, or the Principal's designee;
 - c. A Chair of the Curriculum Council;
 - d. A representative from the Board of Education;
 - e. A teacher representative from an appropriate content area of the resource being challenged provided, the teacher selected is not the individual who submitted the form;
 - f. a parent or guardian of a student *age thirteen years or younger* enrolled in the school district, provided the parent or guardian selected is not the individual who submitted the form;
 - g. a parent or guardian of a student *aged fourteen years or older* enrolled in the school district, provided the parent or guardian selected is not the individual who submitted the form;
 - h. A certified school librarian employed by the board or employed by another board of education in the state.
 - i. In cases where such form is submitted by a student enrolled in *grades nine to twelve*, inclusive, and when appropriate and at the discretion of the superintendent, a student enrolled in grades nine to twelve, inclusive, may serve on the review committee if such student did not submit the reconsideration form, provided the superintendent

Instruction

Library Material Review and Reconsideration

- consults with the principal of the school involved in such reconsideration request prior to making this determination whether to include such student on the review committee.
4. The review committee shall evaluate the request for reconsideration form by reading the challenged material in its entirety and evaluating the challenged material against the school district's *Collection Development and Maintenance Policy*.
 5. The review committee shall make a *written decision* on whether to remove the challenged material *within sixty school days* from the date of receiving such request and provide a copy of the committee's decision and report to *the individual with a vested interest who submitted the form and to the principal of the school*.
 6. The individual with a vested interest who submitted the *request for reconsideration form* may appeal the *review committee's decision* to the Board of Education for the school district. The Board shall determine whether the reconsideration process was followed and publish the decision on the school district's website.
 7. The District may consolidate any requests for review and reconsideration of the same challenged library and other educational material.

General Provisions

Any school library media specialist or school library staff member who, in good faith, implements the policies described in this section shall be immune from any liability, civil or criminal, that might otherwise be incurred or imposed and shall have the same immunity with respect to any judicial proceeding that results from such implementation.

Legal Reference: Connecticut General Statutes

10-220 Duties of boards of education.

10-221(s) Boards of education to prescribe rules, policies, and procedures.

10-228 Free textbooks, supplies, materials and equipment.

Public Act 25-168 An Act Concerning the State Budget for the Biennium Ending June 30, 2027, and Making Appropriations Therefore, and Provisions Related to Revenue and Other Items Implementing the State Budget

Policy Adopted:

Amity Regional School District No. 5
Woodbridge, Connecticut

Instruction

Library Collection Development and Maintenance

Library Media Center materials shall be selected relative to the needs, interests, and abilities of the students in the Amity Regional School District No. 5 (ARSD). The library media center is an important place for voluntary inquiry, the dissemination of information and ideas, and the promotion of free expression and free access to ideas by students. The school library media specialists shall attempt to stimulate and guide reading and teach the effective use of the library.

To this end, the ARSD Board of Education (Board) affirms that it is the responsibility of its professional staff:

- To provide materials that will enrich and support the curriculum, taking into consideration the varied interests, abilities, learning styles, and maturity levels of the students served;
- To provide materials that will stimulate growth in factual knowledge, literary appreciation, aesthetic values, societal standards, and reading skills;
- To provide materials on various sides of controversial topics so that young citizens may have an opportunity to make informed judgments in their daily lives;
- To provide materials representative of the diverse religious, ethnic, cultural, and social groups and individuals that contribute to our world community;
- To place principle above personal opinion and reason above prejudice in the selection of materials, based on their educational and/or socio-cultural value in order to assure a comprehensive collection for the school community.

The primary responsibility for the selection of library media center materials lies with library media specialists employed by the school system. A school library media specialist is professionally trained to curate and develop a collection that shall provide students with access to the widest array of age-appropriate and grade-level-appropriate library and other educational material. Recommendation of resources may involve many people including but not limited to building principals, district administrators, teachers, students, parents, and community members.

The Superintendent shall establish an administrative regulation that establishes a procedure for a certified school library media specialist to continually review library and other educational material within a school library media center using professionally accepted standards which shall include, but need not be limited to: the material's relevance, physical condition of the material, availability of duplicates or copies of the material, availability of more recent age-appropriate or grade-level appropriate material and continued demand for the material.

The Board will review and update this policy as necessary every five years.

(cf. 1312 - Public Complaints)

(cf. 3260 – Sale & Disposal of Books, Equipment & Supplies)

(cf. 4118.21 - Academic Freedom)

(cf. 6144 – Controversial Issues)

(c.f. 6163 – Instructional Resources for Students)

(c.f. 9132.3 – Curriculum Committee)

Policy Adopted:

AMITY REGIONAL SCHOOL DISTRICT NO. 5
Woodbridge, Connecticut

Instruction

Library Collection Development and Maintenance

Legal References: Connecticut General Statutes

10-220 Duties of boards of education.

10-221(s) Boards of education to prescribe rules, policies, and procedures.

10-228 Free textbooks, supplies, materials and equipment.

10-240 Control of schools.

10-241 Powers of school districts.

Academic Freedom Policy (adopted by Connecticut State Board of Education, 9/9/81)

Office for Intellectual Freedom, American Library Association. (2016). *Selection and Reconsideration Policy Toolkit for Public, School, & Academic Libraries.*

Public Act 25-168 An Act Concerning the State Budget for the Biennium Ending June 30, 2027, and Making Appropriations Therefor, and Provisions Related to Revenue and Other Items Implementing the State Budget.

Instruction

Library Display and Program

Library displays and student programs are critical in serving as resources for voluntary inquiry, the dissemination of information and ideas, and promoting free expression and free access to ideas by students.

The Amity Regional School District No. 5 (District) Board of Education (Board) recognizes that library displays are provided for the interest, information and enlightenment of all students, represent a wide range of varied and diverging viewpoints, and provide access to content that is relevant to the research, independent interests and educational needs of students.

The Board acknowledges that a school library media specialist is professionally trained to curate and develop displays and programs that shall provide students with access to the widest array of age-appropriate and grade-level-appropriate library and other educational materials.

The Board will review and update this policy as necessary every five years.

(cf. 4118.21 – Academic Freedom)

(cf. 6144 – Controversial Issues)

(c.f. 6163 – Instructional Resources for Students)

Legal Reference: Connecticut General Statutes

10-220 Duties of boards of education.

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Public Act 25-168 An Act Concerning the State Budget for the Biennium Ending June 30, 2027, and Making Appropriations Therefore, and Provisions Related to Revenue and Other Items Implementing the State Budget

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

November 10, 2025

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

+ NEW HIRES-CERTIFIED:

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

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

+ NEW HIRES-NON-CERTIFIED:

Kerilyn Apuzzo – School Nurse – Amity Regional High School
Nicole Kacprzyski – Paraprofessional – Amity Regional High School

+ NEW HIRES-COACHES:

Sean Kelly – Asst. Boys Soccer Coach – 2025 Fall Season – Amity Regional High School

+ TRANSFERS:

Michael Sibarium – F/T Split Shift Custodian at Amity Regional High School to the position of F/T Day Shift Custodian at Amity Regional High School, effective 11/10/2025.

Donald Linley – F/T 2nd Shift Custodian at Amity Regional High School to the position of F/T Split Shift Custodian at Amity Regional High School, effective 11/10/2025.

Andrew Campbell – F/T 2nd Shift Custodian at Amity Middle School Orange to the position of F/T 2nd Shift Custodian at Amity Regional High School, effective 11/10/2025.

Vugar Imanov – P/T 2nd Shift Custodian at Amity Middle School Orange to the position of F/T 2nd Shift Custodian at Amity Middle School Orange, effective 11/10/2025.

+ RESIGNATIONS: NONE

+ RETIREMENTS: NONE