

AMITY REGIONAL SCHOOL DISTRICT NO. 5

*Bethany Orange Woodbridge
25 Newton Road, Woodbridge, Connecticut 06525*

*Dr. Jennifer P. Byars
Superintendent of Schools*

**AMITY REGIONAL BOARD OF EDUCATION REGULAR MEETING AGENDA
Monday, April 06, 2026 6:30 pm – Immediately Following the Public Budget Hearing
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 – March 23, 2026
4. **PUBLIC COMMENT**
5. **CORRESPONDENCE**
6. **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 the Approval of Revised Curricula
 - i. [7th Grade Social Studies](#)
 - ii. [Latin II](#)
 - b. Middle School Schedule Update
 6. **District Health and Safety**
 7. **District Technology** [page 7](#)
 - a. Monthly Report
 8. **Facilities** [page 8](#)
 - a. Monthly Report
 9. **Finance**
 - a. Discussion and Possible Action on Healthy Food Certification [page 10](#)
 - b. Discussion and Possible Action on Contracts over \$35,000 [page 12](#)
 - i. Fire Suppression Inspection and Testing Services
 - ii. Trash and Recycling Removal Services
 - c. Director of Finance and Administration Approved Transfers Under \$3,000 [page 45](#)
 - d. Discussion and Possible Action on Budget Transfers over \$3,000 [page 48](#)
 - e. Other [page 52](#)
 - i. Food Service Update
 - ii. CNR Quarterly Report
 - iii. Educational Expenditure Reserve Quarterly Report
 - iv. Grants Quarterly Report

PLEASE POST

PLEASE POST

10. **Policy [page 60](#)**
 - a. Second Reads
 - i. Policy 2151 - Recruitment and Selection of Administrative Staff
 11. **Personnel [page 62](#)**
 - a. Personnel Report
7. **NEW BUSINESS & ANNOUNCEMENTS**
 8. **ITEMS FOR THE NEXT REGULAR MEETING AGENDA – Due to Chairperson by April 30, 2026**
 9. **ADJOURNMENT**



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

pc: Town Clerks Bethany, Orange, Woodbridge

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

District Mission Statement

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

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



NORMS

BE RESPECTFUL

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

HONOR THE POSITION

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

REPRESENT THE BOARD WITH UNITY AND PRIDE

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

AMITY REGIONAL BOARD OF EDUCATION SPECIAL MEETING MINUTES

Monday, March 23, 2026 6:30 pm
25 Newton Road, Woodbridge, CT
Lecture Hall

BOARD MEMBERS PRESENT

Cathy Bradley, Autumn Cloud-Ingram, Paul Davis, Jennifer Blando Jacquet, Dr. Karunakaran, Dana Lombardi, Michael McDonough, Dr. Oladele, Meghan Rabuse* (joined remotely via telephone), Patrick Reed, Donna Schlank, Donna Schuster, Christian Young

STUDENT BOARD MEMBERS PRESENT

Shreya Viswanathan

STAFF MEMBERS PRESENT

Dr. Jennifer Byars, Dr. Shannan Carlson, Theresa Lumas, Joseph Stochmal, Emily Clark, Jill LaPlante, Andrea Drewry

1. CALL TO ORDER

Chairperson Davis called the meeting to order at 6:33 p.m.

2. PLEDGE OF ALLEGIANCE

Led by Amity Board of Education Chair Paul Davis

3. BOARD MEMBER APPRECIATION MONTH

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

4. RECOGNITION OF AMITY REGIONAL HIGH SCHOOL CROSS COUNTRY 2025 STATE CHAMPIONSHIP

Presented by Amity Region 5 Superintendent of Schools Dr. Jennifer Byars and Amity Region 5 Assistant Athletic Director Joseph Stochmal

5. APPROVAL OF MINUTES

a. Board of Education Regular Meeting – March 09, 2026

MOTION by Patrick Reed, SECOND by Autumn Cloud- Ingram to approve March 09, 2026 minutes with suggested edits.

VOTES IN FAVOR, 12 (Bradley, Cloud-Ingram, Davis, Jacquet, Dr. Karunakaran, Lombardi, McDonough, Dr. Oladele, Rabuse, Reed, Schuster, Young)

ABSTAIN, 1 (Schlank)

MOTION CARRIES

6. STUDENT REPORT

a. Monthly Report

Presented by Board of Education student representative Shreya Viswanathan

7. 3 A's (Academics, Arts, Athletics) AND POG (Portrait of the Graduate) FOCUS PRESENTATION

a. [The Trident student newspaper](#) –Ms. Clark & students

8. SUPERINTENDENT’S REPORT

a. Superintendent Report

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

9. CHAIRMAN’S REPORT

a. Committee Reports

1. Curriculum and Instruction

a. Academic Updates

i. Dual Enrollment Alumni Survey - Presented by Amity Region 5 Director of Counseling Services Jill LaPlante

ii. Summer Geometry Enrollment - Presented by Amity Region 5 Assistant Superintendent of Schools Dr. Shannan Carlson

b. Discussion and Possible Action on Approval of New Courses

i. Public Speaking

ii. Unified Art

Presented by Amity Region 5 Assistant Superintendent of Schools Dr. Shannan Carlson and Amity Region 5 District Instructional Coach Andrea Drewry

MOTION by Donna Schlank, SECOND by Jennifer Blando Jacquet to approve new courses Public Speaking and Unified Art.

VOTES IN FAVOR, 13 (UNANIMOUS)

MOTION CARRIES

2. Finance

a. Discussion and possible action on the authorization to prepare an Explanatory Text for the 2026-2027 Budget Referendum Question

Presented by Amity Region 5 Director of Finance Theresa Lumas

MOTION by Michael McDonough, SECOND by Dr. Karunakaran to approve Explanatory Text:

Move to authorize Amity Regional School District No. 5 to prepare an Explanatory Text for the 2026- 2027 Budget Referendum Question: BE IT RESOLVED, that the Secretary of the Board of Education of Amity Regional School District No. 5 is authorized to prepare, print, and distribute a concise explanatory text of the budget referendum question which, by vote of the member towns, which text shall not advocate either the approval or disapproval of the proposed budget in the gross amount of \$58,809,212 and the net amount of \$57,261,870, a 1.20% increase over the 2025-26 budget, and shall otherwise be prepared in accordance with Connecticut General Statutes Section 9-369b.

*****IMPORTANT BUDGET DATES*****

Monday, April 6, 2026 – Public Hearing

Monday, May 4, 2026 – Annual Meeting

Tuesday, May 5, 2025 – Referendum

VOTES IN FAVOR, 13 (UNANIMOUS)

MOTION CARRIES

10. DISCUSSION AND POSSIBLE ACTION RELATED TO BOARD ROLES AND RESPONSIBILITIES (anticipated)

MOTION by Dr. Oladele, SECOND by Dana Lombardi to set a date for an Amity Board of Education retreat.

VOTES IN FAVOR, 13 (UNANIMOUS)

MOTION CARRIES

11. PUBLIC COMMENT – Public Comment will be limited to those items noticed in this agenda

ARHS Student spoke on the benefits of Dual Enrollment and voiced their appreciation for the commitment of the Board of Education.

ARHS Student voiced their thoughts on the addition of a Public Speaking Class at ARHS.

12. ITEMS FOR THE NEXT REGULAR MEETING AGENDA – Due to Chairperson by March 31, 2026

13. ADJOURNMENT

Chairperson Davis adjourned the meeting, without objection, at 8:24 p.m.

Respectfully submitted,

Lisa Zaleski

Lisa Zaleski

BOE Recording Secretary

April 2026

Mar. Ticket Summary

Tickets addressed and closed: 314

Tickets open: 9

HS Student Help Desk

Students helped: 297

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:

- Supported SAT and PACT testing for grades 10 and 11 on March 11

Projects in process:

- Working with vendors to identify next year's student device model
- 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
- Security Awareness Training for staff is ongoing
 - Monthly short training videos
 - Monthly phishing simulations
- Working with vendors to identify possible firewall replacement
- 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

April 2026

CLEAN

SAFE

HEALTHY

SCHOOLS

FMX Report

For March:
69 requests opened
56 requests closed



Amity Regional School
District No. 5

25 Newton Road

Woodbridge, CT 06525

Phone: 203-397-4817

Amity Regional School District No. 5

Facilities Department Monthly Report

Completed Projects:

- The underground electrical feed for the fire pump at AMSB was damaged. Repairs were made by both our in-house electrician and an outside contractor.
- Bids for the district-wide trash removal, fire suppression testing, and inspection were received on March 13th. The board will be asked to award contracts for these services at the April 6th meeting.
- An outside vendor repaired refrigeration problems with the walk-in cooler in the ARHS cafeteria.
- The electric motor on the dust collector at ARHS was replaced by our in-house electrician.
- Multiple water bottle filling/water fountain stations experienced circuit board failures, and were repaired by our in-house building maintainer at ARHS.
- A failed electrical component for the dishwasher at ARHS was repaired by our in-house electrician.
- A replacement dryer and range hood were installed in the SAILS room at AMSO by our in-house building maintainers.

Projects in process:

- The bell and paging system upgrades for the Middle Schools are scheduled to start after school is out for the summer. Preliminary wiring, additional speakers, and the amplifiers and racks to house the equipment have been installed. Additional behind-the-scenes work is scheduled for the April break and in May to prepare.
- The AMSB fire pump replacement project was awarded to Encore Fire Protection and is scheduled to start on June 15th.
- The District is working with Miller Steel Buildings to purchase two storage buildings for the Middle Schools to address storage needs. The permit for Orange has been secured, and the unit is being built. Delivery is scheduled for late April. Bethany's permit process is in progress.
- The replacement District pickup truck has been ordered through Blasius Chevrolet. The truck has arrived and will be delivered on Tuesday, April 7th.
- A circulator pump for the heat exchanger loop of the fuel cell at ARHS has failed. The new pump arrived, but we will need to schedule the installation around a time when we can shut down the boilers for a while.

Outstanding issues to be addressed:

The District has been collaborating with the Town of Woodbridge to address concerns regarding the fuel cell and microgrid. A meeting was held on March 24th with Town, District, CT DEEP, Fuel Cell, and UI officials regarding the multiple failed tests and next steps. A schedule and plans are being developed to allow Fuel Cell another attempt to have a successful test. The Town of Woodbridge will also draft communications to the town about the current state of the microgrid and the High School's role as an emergency shelter.

While scheduling a planning meeting with Greenskies and Titan Energy regarding the ARHS solar canopy project, the district was informed that the project may not proceed this

summer due to a lengthy permitting process. UI will need to conduct an extensive review of the application. We received the interconnection request application, and after reviewing it, we asked Greenskies to make some edits, which they have done; they are now waiting to hear back from UI.

Outstanding issues to be addressed:

Our in-house HVAC maintainer has been noticing increased issues in the HVAC glycol loop at AMSO. He has reported an increase in sludge buildup in the lines, reducing hot water flow to certain heating units. The department is beginning to investigate remediation and preventative measures that will align with the planned bond replacement of the entire HVAC system.

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



Dr. Jennifer P. Byars
Superintendent of Schools

Shannan Perry Carlson
Assistant Superintendent
of Schools

H. Thomas Brant
Director of Pupil Services

Theresa Lumas
Director of Finance
& Administration

Stephen Martoni
Director of Facilities

To: Theresa Lumas, Director of Finance and Administration
From: Kathleen Kovalik, Assistant Director of Finance and Administration
Date: February 17, 2026
Re: Health Food Program Statement for July 1, 2026 through June 30, 2027

Each year the Board of Education has to confirm its participation in the Health Foods program from the State of Connecticut. By participating in this program the District receives payments from the State. In the last fiscal year, the District received \$12,880.00. If the District does not participate in the program, it would not receive these funds. However, the District would still be required to follow the same guidelines as they are issued by the federal government, which provides over \$100,000.00 of support to the nutrition program. Below are the motions I recommend the AFC and Board of Education to make.

Amity Finance Committee:

1. Pursuant to C.G.S. Section 10-215f, the Amity Regional School District No. 5 certifies that all food items offered for sale to students in the schools under its jurisdiction, and not exempted from the Connecticut Nutrition Standards published by the Connecticut State Department of Education, will comply with the Connecticut Nutrition Standards during the period of July 1, 2026, through June 30, 2027. This certification shall include all food offered for sale to students separately from reimbursable meals at all times and from all sources, including but not limited to school stores, vending machines, school cafeterias, culinary programs, and any fundraising activities on school premises sponsored by the school or non-school organizations and groups.

For the Amity Finance Committee:

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

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

For the Amity Finance Committee:

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

Amity Board of Education:

1. Pursuant to C.G.S. Section 10-215f, the Amity Regional School District No. 5 certifies that all food items offered for sale to students in the schools under its jurisdiction, and not exempted from the Connecticut Nutrition Standards published by the Connecticut State Department of Education, will comply with the Connecticut Nutrition Standards during the period of July 1, 2026, through June 30, 2027. This certification shall include all food offered for sale to students separately from reimbursable meals at all times and from all sources, including but not limited to school stores, vending machines, school cafeterias, culinary programs, and any fundraising activities on school premises sponsored by the school or non-school organizations and groups.

For the Amity Board of Education:

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

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

For the Amity Board of Education:

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

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



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

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

To: Dr. Jennifer Byars, Superintendent of Schools
From: Theresa Lumas, Director of Finance and Administration
Re: Award of Contracts of \$35,000 of More
Date: March 17, 2026

Facilities:

1. Fire Suppression System:

The District bid services for inspection and testing of the fire suppression systems in the three schools. Four vendors submitted 3-year proposals ranging from \$45,906 to \$61,332. The low bid was an incomplete bid and second lowest bid was from Encore Fire Protection at \$57,280 for 3 years. The first year of the three-year contract is \$18,560. The total three-year contract is \$57,280.

Amity Finance Committee:

Move to recommend the Amity Board of Education approve –

Amity Board of Education:

Move to award –

... the inspection of the fire suppression system to Encore Fire Protection, a 3-year contract totaling \$57,280. The first year of a three-year contract at the price of \$18,560. The Board reserves the right to cancel the contract if Encore Fire Protection, Inc., fails to perform in a satisfactory manner.

2. Trash and Recycling Removal Services:

Three vendors responded to the District's bid for trash and recycling removal. Mr. Martoni is recommending the Amity Board of Education award a three-year contract for the Trash and Recycling Removal Services to All American Waste, LLC at a price of \$140,079 not including extra charges for additional pickups. Next year is year one, it is priced at \$46,693.

Amity Finance Committee:

Move to recommend the Amity Board of Education approve –

Amity Board of Education:

Move to award –

... a three-year contract for the Trash and Recycling Removal Services to All American Waste, LLC at a price of \$140,079 not including extra charges for additional pickups. Next year is year one, it is priced \$46,693. The Board reserves the right to cancel the contract if All American Waste, LLC fails to perform in a satisfactory manner.

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

LINE	CATEGORY	COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2024-2025 ACTUAL	2025-2026 BUDGET	FEB 26 FORECAST	CHANGE INCR./ (DECR.)	MAR 26 FORECAST	VARIANCE OVER/(UNDER)	FAV 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	294,596	0	294,596	72,999	FAV
3	OTHER STATE GRANTS	991,294	1,036,599	1,105,971	0	1,105,971	69,372	FAV
4	MISCELLANEOUS INCOME	20,139	15,000	21,000	0	21,000	6,000	FAV
5	TOTAL REVENUES	56,606,852	58,108,999	58,257,370	0	58,257,370	148,371	FAV
6	SALARIES	30,600,178	32,683,157	32,288,061	(43,862)	32,244,199	(438,958)	FAV
7	BENEFITS	6,740,038	7,156,139	7,131,267	(33,000)	7,098,267	(57,872)	FAV
8	PURCHASED SERVICES	9,450,226	10,909,628	10,949,204	(67,591)	10,881,613	(28,015)	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	3,860,395	(179,600)	3,680,795	125,797	UNF
11	EQUIPMENT	245,196	274,400	323,435	7,540	330,975	56,575	UNF
12	IMPROVEMENTS / CONTINGENCY	137,685	749,000	749,000	4,508	753,508	4,508	UNF
13	DUES AND FEES	214,307	229,381	229,381	(25,000)	204,381	(25,000)	FAV
14	TRANSFER ACCOUNT	1,129,132	0	0	0	0	0	FAV
15	TOTAL EXPENDITURES	55,792,102	58,108,999	58,083,039	(337,005)	57,746,034	(362,965)	FAV
16	SUBTOTAL	814,752	0	174,331	337,005	511,336	511,336	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)	898,605	0	174,331	337,005	511,336	511,336	FAV

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

LINE	CATEGORY	COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2024-2025 ACTUAL	2025-2026 BUDGET	FEB 26 FORECAST	CHANGE INCR./.(DECR.)	MAR 26 FORECAST	VARIANCE OVER/(UNDER)	FAV UNF
1	BETHANY ALLOCATION	8,828,986	9,160,226	9,012,747	0	9,012,747	(147,479)	UNF
1a	PRIOR YEAR CREDIT BETHANY	183,118	0	147,479		147,479	147,479	UNF
2	ORANGE ALLOCATION	26,964,444	27,533,537	27,087,476	0	27,087,476	(446,061)	UNF
2a	PRIOR YEAR CREDIT ORANGE	514,596	0	446,061		446,061	446,061	UNF
3	WOODBRIIDGE ALLOCATION	18,427,914	20,142,040	19,836,976	0	19,836,976	(305,064)	UNF
3a	PRIOR YEAR CREDIT WOODBRIDGE	352,967	0	305,064		305,064	305,064	UNF
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	100,000	0	100,000	40,000	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	294,596	0	294,596	72,999	FAV
12	ADULT EDUCATION	5,178	4,900	4,427	0	4,427	(473)	UNF
13	OPEN CHOICE	0	125,000	132,000	0	132,000	7,000	FAV
14	SPECIAL EDUCATION GRANTS	964,016	884,599	952,644	0	952,644	68,045	FAV
15	TRANSPORTATION INCOME-MAGNET	22,100	22,100	16,900	0	16,900	(5,200)	UNF
16	OTHER STATE GRANTS	991,294	1,036,599	1,105,971	0	1,105,971	69,372	FAV
17	INTERGOVERNMENTAL REVENUE	0	0	0	0	0	0	FAV
18	OTHER REVENUE	20,139	15,000	21,000	0	21,000	6,000	FAV
19	TRANSFER IN	0	0	0	0	0	0	FAV
20	MISCELLANEOUS INCOME	20,139	15,000	21,000	0	21,000	6,000	FAV
21	TOTAL REVENUES	56,606,852	58,108,999	58,257,370	0	58,257,370	148,371	FAV

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

LINE	CATEGORY	COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COLUMN 7
		2024-2025 ACTUAL	2025-2026 BUDGET	FEB 26 FORECAST	CHANGE INCR./.(DECR.)	MAR 26 FORECAST	VARIANCE OVER/(UNDER)	FAV UNF
1	5111-CERTIFIED SALARIES	25,246,947	26,913,147	26,588,991	(2,996)	26,585,995	(327,152)	FAV
2	5112-CLASSIFIED SALARIES	5,353,231	5,770,010	5,699,070	(40,866)	5,658,204	(111,806)	FAV
3	SALARIES	30,600,178	32,683,157	32,288,061	(43,862)	32,244,199	(438,958)	FAV
4	5200-MEDICARE - ER	428,639	474,989	474,989	(10,000)	464,989	(10,000)	FAV
5	5210-FICA - ER	343,760	378,210	378,210	(18,000)	360,210	(18,000)	FAV
6	5220-WORKERS' COMPENSATION	158,586	169,575	150,203	0	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	10,000	0	10,000	(5,500)	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	(5,000)	22,000	(5,000)	FAV
19	BENEFITS	6,740,038	7,156,139	7,131,267	(33,000)	7,098,267	(57,872)	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	(10,000)	147,949	(10,000)	FAV
22	5330-PROFESSIONAL & TECHNICAL SRVC	2,247,009	2,602,472	2,756,261	9,000	2,765,261	162,789	UNF
23	5440-RENTALS - LAND, BLDG, EQUIPMENT	104,661	123,327	120,827	0	120,827	(2,500)	FAV
24	5510-PUPIL TRANSPORTATION	3,727,958	4,184,788	4,371,345	(2,575)	4,368,770	183,982	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	2,902,948	(54,016)	2,848,932	(349,873)	FAV
28	5590-OTHER PURCHASED SERVICES	70,316	120,525	120,525	(10,000)	110,525	(10,000)	FAV
29	PURCHASED SERVICES	9,450,226	10,909,628	10,949,204	(67,591)	10,881,613	(28,015)	FAV

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

LINE	CATEGORY	COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2024-2025 ACTUAL	2025-2026 BUDGET	FEB 26 FORECAST	CHANGE INCR./((DECR.)	MAR 26 FORECAST	VARIANCE OVER/(UNDER)	FAV 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	972,223	(155,000)	817,223	98,803	UNF
34	5420-REPAIRS, MAINTENANCE & CLEANING	798,707	857,352	860,882	0	860,882	3,530	UNF
35	5611-INSTRUCTIONAL SUPPLIES	322,271	436,097	434,061	(50,000)	384,061	(52,036)	FAV
36	5613-MAINTENANCE/CUSTODIAL SUPPLIES	178,557	220,450	212,950	0	212,950	(7,500)	FAV
37	5620-OIL USED FOR HEATING	67,017	55,260	55,260	4,000	59,260	4,000	UNF
38	5621-NATURAL GAS	77,407	99,100	156,700	31,400	188,100	89,000	UNF
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	(10,000)	259,241	(10,000)	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	3,860,395	(179,600)	3,680,795	125,797	UNF
45	5730-EQUIPMENT - NEW	8,199	4,500	2,500	7,540	10,040	5,540	UNF
46	5731-EQUIPMENT - REPLACEMENT	66,263	105,617	156,652	0	156,652	51,035	UNF
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	323,435	7,540	330,975	56,575	UNF
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	(51,169)	48,831	(51,169)	FAV
51a	TRSF. FROM FACILITIES CONTINGENCY	-100,000	0	0	51,169	51,169	51,169	UNF
52	5720-IMPROVEMENTS TO SITES	70,376	173,000	173,000	4,508	177,508	4,508	UNF
53	5850-DISTRICT CONTINGENCY	74,500	150,000	130,001	0	130,001	(19,999)	FAV
53a	TRSF. FROM CONTINGENCY TO OTHER ACCTS.	-74,500	0	19,999	0	19,999	19,999	UNF
54	IMPROVEMENTS / CONTINGENCY	137,685	749,000	749,000	4,508	753,508	4,508	UNF

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

LINE	CATEGORY	COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COLUMN 7
		2024-2025 ACTUAL	2025-2026 BUDGET	FEB 26 FORECAST	CHANGE INCR./((DECR.))	MAR 26 FORECAST	VARIANCE OVER/(UNDER)	FAV UNF
55	5580-STAFF TRAVEL	28,311	27,377	27,377	(5,000)	22,377	(5,000)	FAV
56	5581-TRAVEL - CONFERENCES	83,228	85,718	85,718	(15,000)	70,718	(15,000)	FAV
57	5810-DUES & FEES	102,769	116,286	116,286	(5,000)	111,286	(5,000)	FAV
58	DUES AND FEES	214,307	229,381	229,381	(25,000)	204,381	(25,000)	FAV
59	5856-TRANSFER ACCOUNT	1,129,132	0	0	0	0	0	FAV
60	TOTAL EXPENDITURES	55,792,102	58,108,999	58,083,039	(337,005)	57,746,034	(362,965)	FAV
61	RESTRICTED - RETURN TO TOWNS	898,605						

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



March 2026

2025-2026 FORECAST

OVERVIEW

The projected unspent fund balance for this fiscal year is \$511,336 FAV, previously \$174,331 FAV, which appears on page 1, column 6, and line 19. The unspent funds from fiscal year 2025, \$898,604 were 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/September 2026 meeting.

REVENUES BY CATEGORY

The projected balance of revenues is **\$148,371 FAV**, previously \$148,371 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 \$40,000 FAV, previously \$40,000 FAV.*

<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%
Nov 2025	.40%	4.05%
Dec 2025	.40%	3.87%
Jan 2026	.40%	3.74%
Feb 2026	.40%	3.73%

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 \$32,999 FAV, from the rate change.*

LINE 12 on Page 2: ADULT EDUCATION:

The forecast is based on actual State payments year-to-date. *The forecast is \$473 UNF, previously \$473 UNF.*

LINE 13 on Page 2: OPEN CHOICE:

The forecast is based on historical data of State payments. *The forecast is \$7,000 FAV, previously \$7,000 FAV. 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 the December SEDAC-G report and the first payment from the State for placements and transportation. **Currently the forecast is \$68,045 FAV.** The budget is based on a 60% reimbursement rate. The first payment received is at 67.91% rate. The final reimbursement rate is subject to change.

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 \$5,200 UNF, previously 5,200 UNF.*

LINE 18 on Page 2: OTHER REVENUE:

The forecast is based on the budget developed on historical payments. *The forecast is \$6,000 FAV, previously \$6,000 FAV.*

EXPENDITURES BY CATEGORY

The projected yearend balance of expenditures is *\$362,965 FAV, previously \$25,960 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 year-to-date, *\$108,667 FAV; one mid-year staff resignation which is not currently filled and vacant positions for the remainder of the year, \$146,668, FAV. A resignation in March resulted in filling the position with a current substitute who is certified, creating savings to due salary step placement, \$5,401 FAV. A portion of a certified position for math invention is now charged to Title I, instead of a non-certified position \$15,000 FAV and turnover is \$54,731 FAV. The forecast is \$327,152 FAV, previously \$324,156 FAV.*

LINE 2 on Page 3: 5112-CLASSIFIED SALARIES:

The forecast is \$111,806 FAV, previously \$70,940 FAV. This is due to unpaid leaves of absences and staff turnover in technology technicians, nurse, paraeducators and custodians less overtime for snow removal during the holiday periods and substitutes hired to cover long term absences. There continues to be high turnover for paraeducator positions and there is a vacant evening guard position.

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

The forecast is based on an estimated savings based on salary forecast of vacancies, turnover, and unpaid leaves. \$28,000 FAV.

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 to 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 103.2%, previously 105.6% of budget. A stop-loss credit of \$95,283 was applied to March claims. No change in the forecast is noted currently since fees are 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
<i>NOV</i>	\$ 472,761	\$ 489,383	\$ (16,622)	\$ 458,288	\$ 541,882
<i>DEC</i>	\$ 740,382	\$ 607,751	\$ 132,631	\$ 477,519	\$ 363,042
<i>JAN</i>	\$ 438,636	\$ 344,031	\$ 94,605	\$ 328,754	\$ 220,714
<i>FEB</i>	\$ 214,599	\$ 286,051	\$ (71,452)	\$ 382,582	\$ 183,906
<i>MAR</i>	\$ 208,604	\$ 335,443	\$ (126,839)	\$ 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	\$ 5,410,648	\$ 5,243,525	\$ 167,123	\$ 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%	103.2%

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
<i>NOV</i>	\$ 60,629	\$ 59,397	\$ 1,232	\$ 53,061	\$ 53,732
<i>DEC</i>	\$ 7,554	\$ 62,289	\$ (54,735)	\$ 51,875	\$ 53,218
<i>JAN</i>	\$ (109,079)	\$ 29,815	\$ (138,894)	\$ (6,882)	\$ 48,165
<i>FEB</i>	\$ 73,623	\$ 85,092	\$ (11,469)	\$ 82,020	\$ 57,785
<i>MAR</i>	\$ 58,939	\$ 39,994	\$ 18,945	\$ (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	\$ 357,466	\$ 633,867	\$ (276,401)	\$ 417,985	\$ 490,226

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 year-to-date costs, \$5,500 FAV, previously \$5,500 FAV.

LINE 18 on Page 3: 5292-TUITION REIMBURSEMENT:

The forecast is based on year-to-date requests for reimbursements, \$5,000 FAV, previously neutral.

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 \$162,789 UNF, previously \$153,789 UNF. A transfer was requested in September for professional services to cover a staffing shortage. A transfer was approved in December for continuing those services, \$32,250 UNF and covering a leave of absence for \$17,850. Three administrative assistants are out on leave of absence. One position is

being covered in-house, the other 2 positions have part-time coverage through an agency. Several transfers were approved in December for this account. A transfer was approved in January for homebound services, \$5,000 UNF. *Three transfers were approved in March for contracted services in special education, increasing the account by \$36, 227 UNF.*

LINE 23 on Page 3: 5440-RENTALS:

The forecast is based on favorable \$2,500, previously on budget. A transfer was approved in March to support special education services, \$2,500 FAV.

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 \$183,982 UNF, previously \$186,557 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 \$349,873 FAV previously \$295,493 FAV. Data changes based on actual student placements and services. A transfer was approved in March for contact services, \$3,002 UNF. Another transfer is requested this month for special education services at Vo-Ag schools.*

Tuition for the Vo-Ag schools is \$35,871 UNF, previously \$17,638 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	5
Trumbull	1	1	3	4	3	3	3
Nonnewaug	9	9	7	8	4	7	5
Emmett O'Brien	0	0	2	2	0	1	4
Common Ground Charter HS	1	1	3	2	0	0	1
Fairchild Wheeler	0	0	0	0	1	0	0
NH Coop Arts	0	0	0	0	1	1	1

Wintergreen Magnet	1	1	0	0	0	0	0
Marine Science Magnet HS	0	0	1	0	0	0	0
Engineering Science Magnet	0	0	0	0	1	0	1
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 \$367,873 FAV, previously \$295,493 FAV.

	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(10)
Private SPED	20	16	19	15	21	17(17)
Totals	30	25	27	24	31	27(27)

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 0.10793 or a cost of \$364,480 before delivery charges. Forecast is overbudget estimating, \$95,000 UNF, previously \$250,000 UNF. The UI accounts General Service Time-of-Use Rates (GST) were reviewed after a ruling in January. It was determined that a \$95,316 credit will be applied to the high school account.

Higher delivery and public benefit charges continue this fiscal year as was incurred in the previous fiscal year, the account will still 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 total: \$99,065 and VNM credits from April 2025 to date are \$46,969.*

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>	<i>391,045</i>	305,906	<i>85,139</i>	352,636	275,363
<i>AUG</i>	<i>397,458</i>	335,816	<i>61,642</i>	341,068	339,333
<i>SEP</i>	<i>353,839</i>	306,316	<i>47,523</i>	315,393	295,827
<i>OCT</i>	<i>375,487</i>	269,943	<i>105,544</i>	302,667	250,944
<i>NOV</i>	<i>344,064</i>	256,908	<i>87,156</i>	264,619	251,734
<i>DEC</i>	<i>298,846</i>	252,134	<i>46,712</i>	259,154	233,988
<i>JAN</i>	<i>322,371</i>	271,152	<i>51,219</i>	292,535	271,629
<i>FEB</i>	<i>328,829</i>	264,207	<i>64,622</i>	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	3,926,557	3,377,000	549,557	3,589,872	3,288,676

DEGREE DAYS

There are 5,138 degree days to date as opposed to 4,632 last year.

LINE 34 on Page 4: 5420-REPAIRS & MAINTENANCE: *The forecast is \$3,530 UNF, previously 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. *The costs for cleaning up snowfall and treating for icing events put the snow removal over-budget, \$46,661 UNF, previously \$3,530 UNF. A transfer is requested from contingency this month.*

LINE 35 on Page 4: 5611-INSTRUCTIONAL SUPPLIES: *The forecast is \$52,036 FAV, based on current account balances, previously \$2,036 FAV.*

LINE 36 on Page 4: 5613-MAINTENANCE SUPPLIES: *The forecast is \$7,500 FAV, previously \$7,500 FAV.*

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 to overbudget.* A circulator pump for the heat exchanger loop connected to the fuel cell failed and the part has been on order for 4 weeks. This high school has been utilizing natural gas to heat the building during the coldest part of the winter. *Natural gas is projected to be over budget an estimated \$89,000 UNF, previously \$57,600 UNF.*

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 \$5,540 UNF, previously \$2,000 FAV. A transfer is requested this month for risers for chorus.

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

The forecast is projected to be \$51,035 UNF, previously \$51,035 UNF. A budget transfer was approved in November for the purchase of a new truck which came in overbudget.

A transfer was approved in November for \$19,999 for lighting board and control module for the Brady Center. The lighting control module and dimmer board failed and currently have a temporary repair. The project cost is \$45,861 and can be funded from the Capital Nonrecurring fund for lighting projects. The transfer made in November can support the replacement of the fire control panel at the high school for \$19,500. The panel is outdated and cannot recognize updated software. A transfer was approved in January for tech ed equipment that is not functioning correctly. The machine is outdated and repairs will cost over \$5,000. The router is used by both the art and tech ed departments. Both departments are combining to transfer \$4,036. The majority of the purchase will be funded through the Carl Perkins grant.

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. *There is a transfer requested this month for \$51,169 UNF to cover snow removal and backstop repairs. The balance in the account is \$48,831 FAV if transfers are approved. These funds will be needed to cover utilities.*

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. **The forecast is projected to be \$4,508 UNF, previously neutral.**

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. A transfer was approved in November for \$19,999 for lighting board and control module for the Brady Center. The funds for this transfer was repurposed for a fire control panel at ARHS. ***The current balance in general contingency is \$130,001 which is expected to be applied to the utility accounts.***

LINE 56 on Page 5: 5581-TRAVEL AND CONFERENCES:

The forecast is \$15,000 FAV, previously neutral.

LINE 57 on Page 5: 5810-DUES & FEES:

The forecast is \$5,000 FAV, previously neutral..

LINE 59 on Page 5: 5856-TRANSFER:

This line is used to identify funds for the Educational Expenditures Reserve transfers. The District is legally allowed to transfer with Board approval up to 2% or \$1,162,179 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 audited amount of unspent funds is \$898,604 FAV and were 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 were reduced in March 2026.***

APPENDIX A

COST SAVINGS AND EFFICIENCIES FOR FISCAL YEAR 2025-2026

TOTAL ANNUAL SAVINGS TO-DATE OF: \$92,640

\$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.

\$46,969 Electricity: The District entered into a net metering contract. Credits have started to be applied to the account. Credits applied from April 2025 through February are \$46,969.

\$890 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).

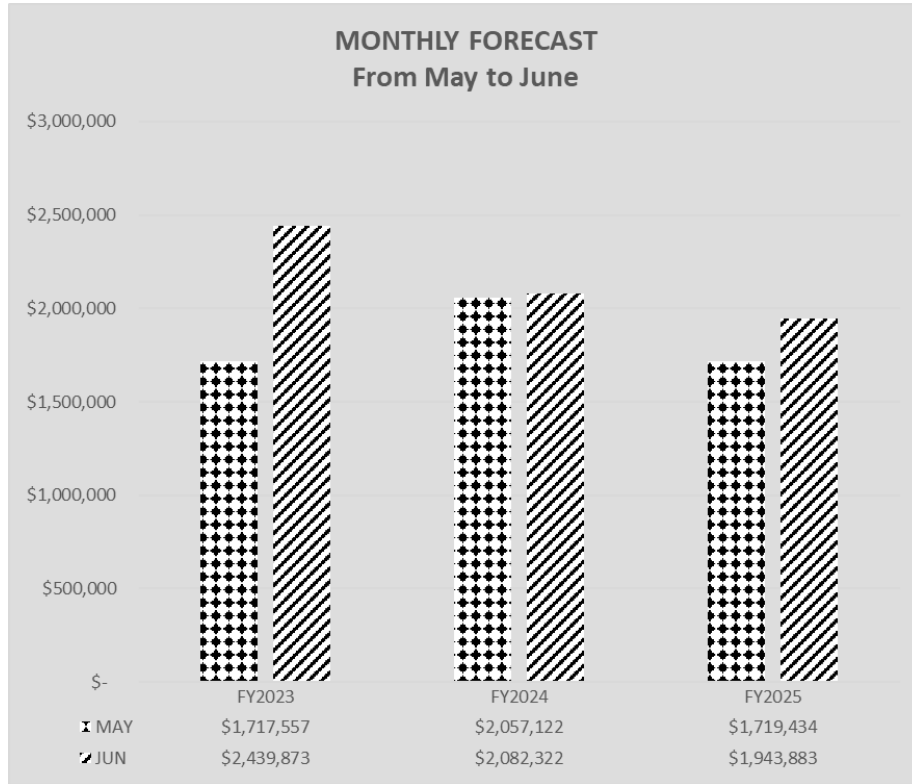
Revenues can be most impacted by decisions made at the State level for Special Education and Transportation grants. The reimbursement rate can change in mid-year as it did in 2024-2025. The State then added a special appropriation in June, the final month of the fiscal year.

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 audited 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 maintance costs were lower due to excellent preventative maintenance and in-house repairs by \$50,000.

SPECIAL EDUCATION :

\$ 1,764,799

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

OTHER:

\$ 287,004

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

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

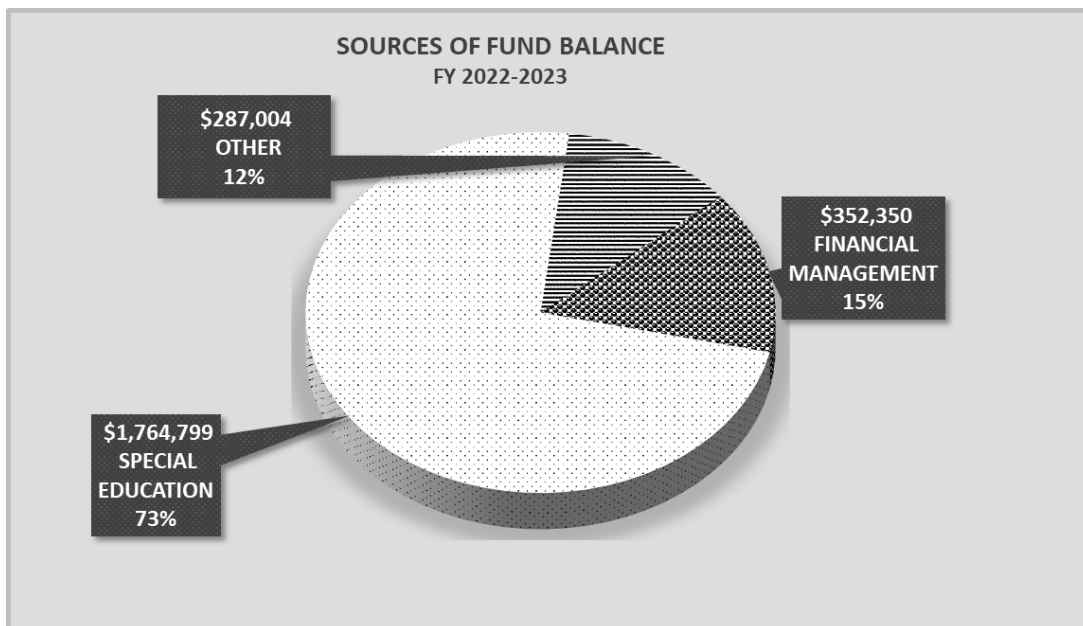
\$103,184 MEDICAL: The medical account was under budget \$103,184 due to the high staff turnover.

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

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

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

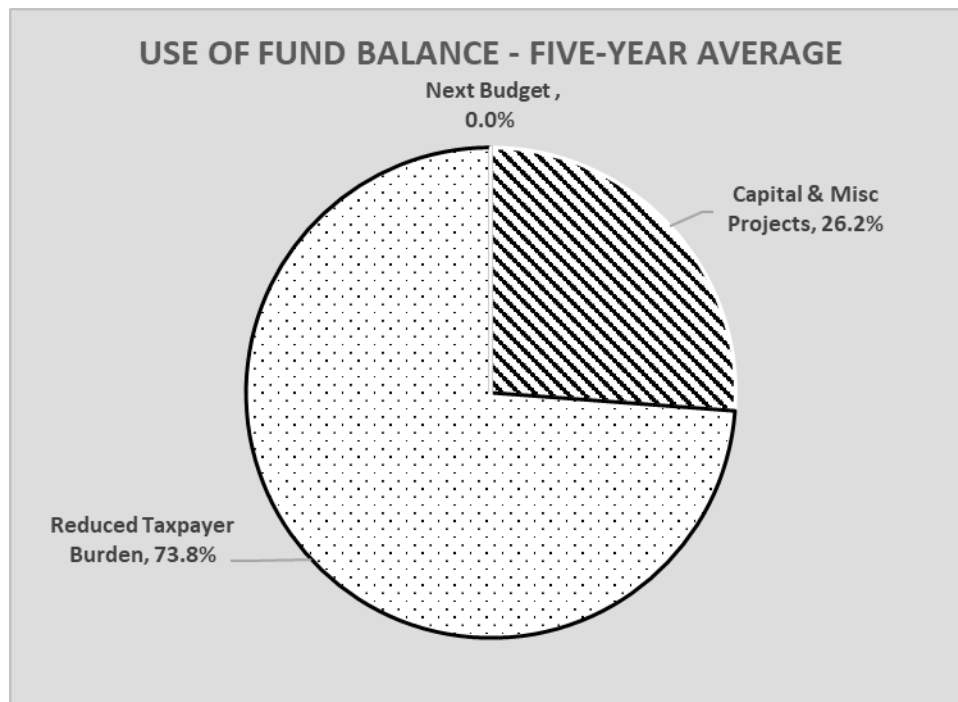
The primary sources of the fund balance are shown graphically below:



The use of the fund balance is proposed as follows:

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

The uses of the fund balance are shown graphically below:



Unspent Funds:

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

APPENDIX 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.

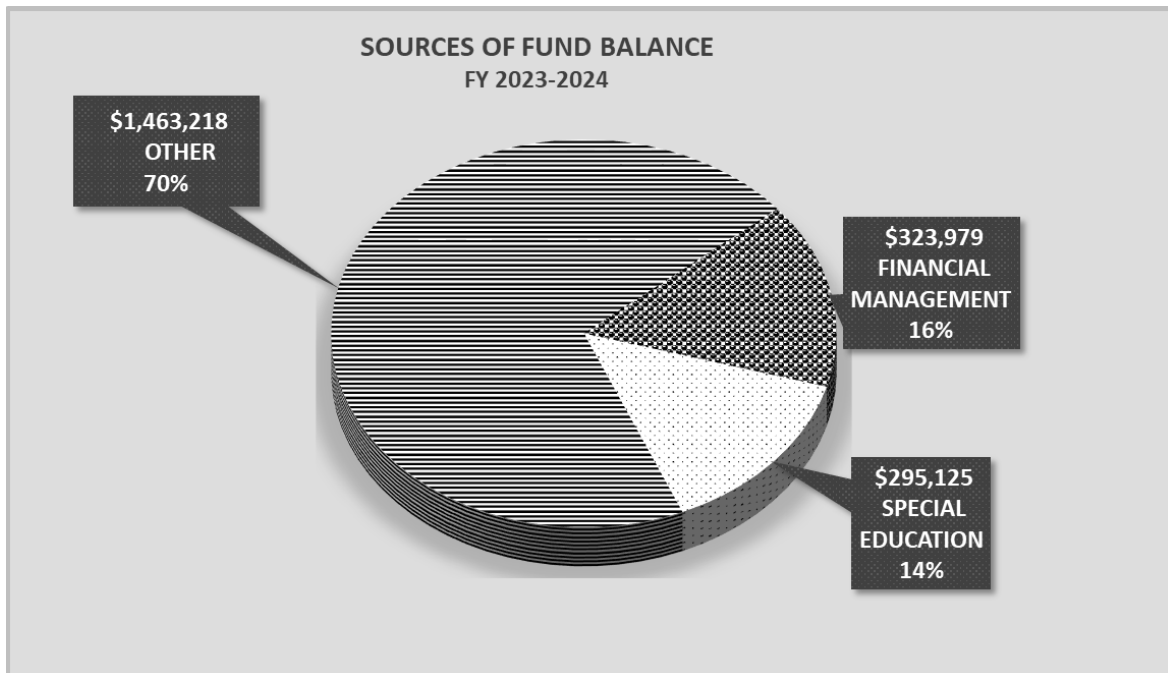
\$63,947 UTILITIES: Electricity, natural gas and oil were all under budget due to a mild winter and cooler spring.

\$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.

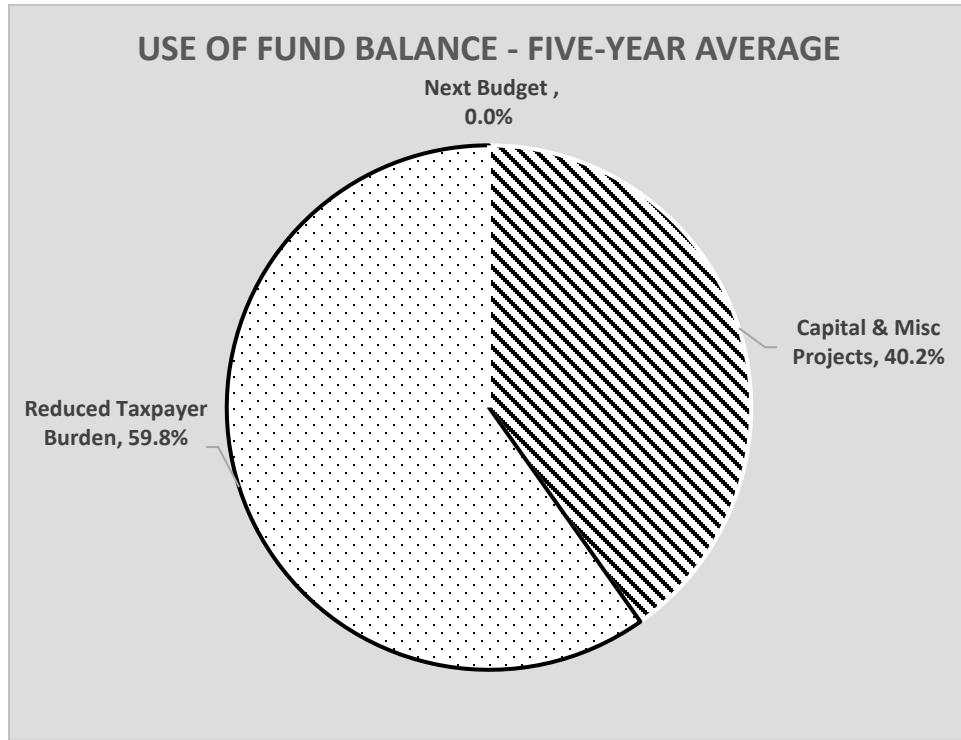
The primary sources of the fund balance are shown graphically below:



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 audited 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.

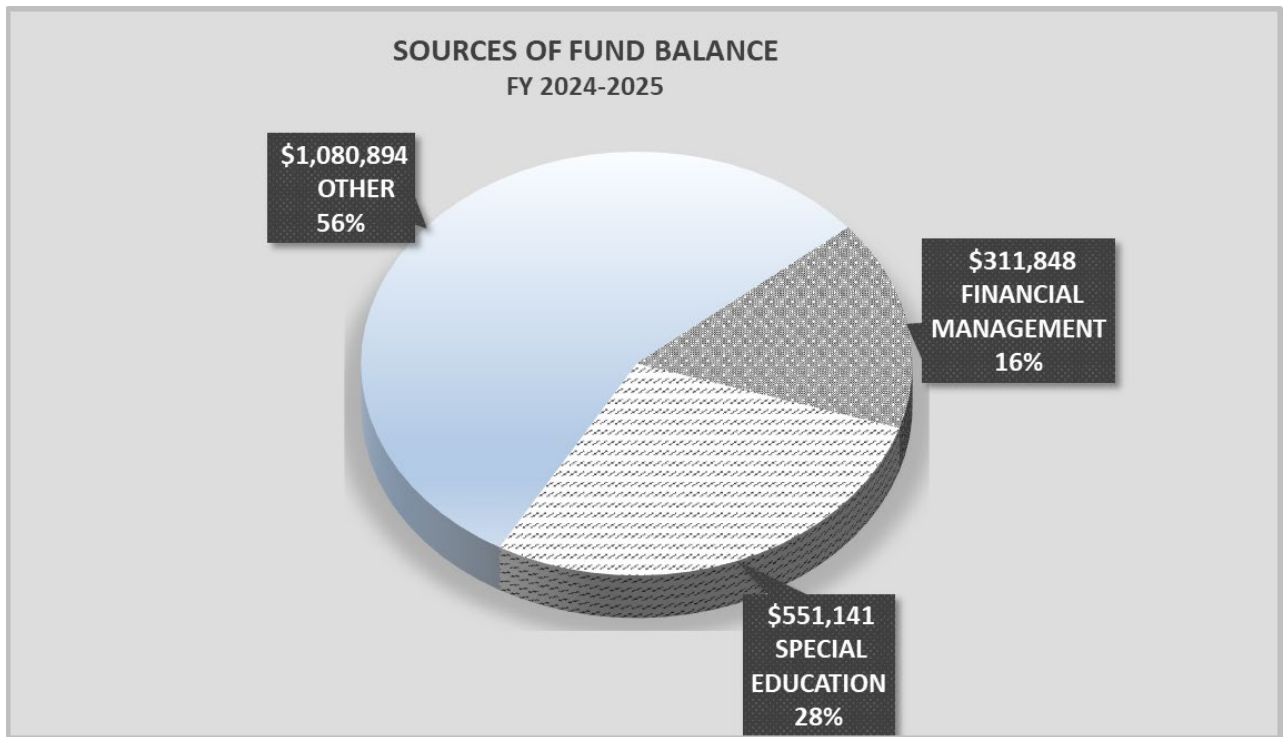
\$42,256 SUPPLIES (OTHER): Instructional supplies are \$63,000 under budget, other supplies are \$11,105 under budget, transportation fuel was under budget \$9,519 and technology supplies are \$13,796 under budget. There was a soft freeze mid-year in response to high medical claims and lower special 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.

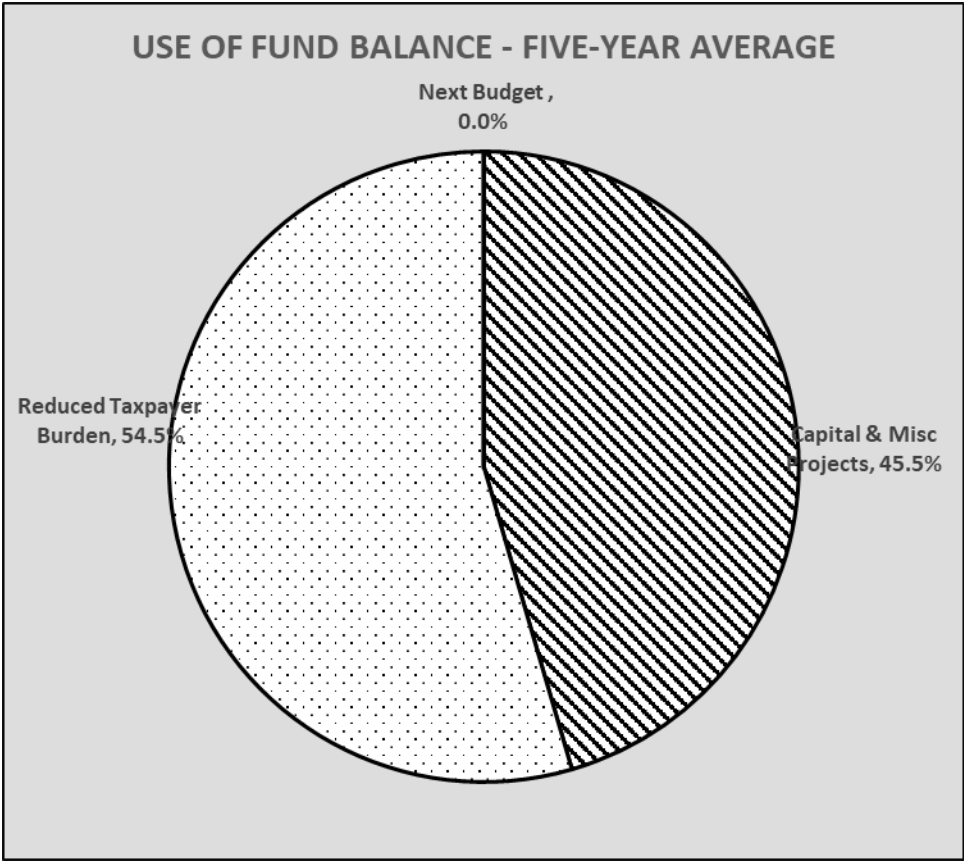
The primary sources of the fund balance are shown graphically below:



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 audited 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 XI
Aug-25	58	1 -03-11-1009-5641 TEXTS & DIGITAL RESOURCES	\$ (2,900.00)	Online Textbooks-Math XI
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
Oct-25	194	1 -01-13-2400-5690 OTHER SUPPLIES	\$ (1,150.00)	Remarkble Tablet-J.Tracy
Oct-25	194	1 -01-13-2400-5731 EQUIPMENT REPLACEMENT	\$ (550.00)	Remarkble Tablet-J.Tracy
Oct-25	194	1 -01-14-2350-5732 EQUIP-TECH-NEW	\$ 1,700.00	Remarkble Tablet-J.Tracy
NOV				
Nov-25	46	1 -03-11-1007-5730 EQUIPMENT-NEW	\$ 2,000.00	Compost Bins, Bin Roof Supply
Nov-25	46	1 -03-14-2600-5613 CUSTODIAL SUPPLIES	\$ (2,000.00)	Compost Bins, Bin Roof Supply
Nov-25	75	1 -02-13-2220-5642 LIBRARY BOOKS	\$ (400.00)	Addition To Database
Nov-25	75	1 -02-14-2350-5695 SOFTWARE	\$ 400.00	Addition To Database
Nov-25	76	1 -02-11-1016-5611 INSTRUCTIONAL SUPPLIES	\$ (295.00)	Ai Workshop
Nov-25	76	1 -02-13-2400-5581 TRAVEL CONFERENCES	\$ 295.00	Ai Workshop
Nov-25	91	1 -01-11-1016-5611 INSTRUCTIONAL SUPPLIES	\$ (295.00)	On-Line Ai Workshop
Nov-25	91	1 -01-13-2400-5581 TRAVEL CONFERENCES	\$ 295.00	On-Line Ai Workshop
Nov-25	156	1 -05-13-2213-5111 CERTIFIED SALARIES	\$ (2,500.00)	PI Session Supplies
Nov-25	156	1 -05-13-2213-5590 OTHER PURCHASED SERVICES	\$ 2,500.00	PI Session Supplies
Nov-25	164	1 -01-14-2600-5613 CUSTODIAL SUPPLIES	\$ (1,011.50)	Snowblower For Bethany
Nov-25	164	1 -01-14-2600-5731 EQUIPMENT-REPLACEMENT	\$ 1,011.50	Snowblower For Bethany

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

MONTH/YR	JNL#	ACCOUNT NUMBER	DESCRIPTION	AMOUNT	DESCRIPTION
Nov-25	165	1 -02-14-2600-5613	CUSTODIAL SUPPLIES	\$ (1,011.50)	Snowblower For Orange
Nov-25	165	1 -02-14-2600-5731	EQUIPMENT-REPLACEMENT	\$ 1,011.50	Snowblower For Orange
DEC					
Dec-25	135	1 -02-13-2220-5642	TEXTS & DIGITAL RESOURCES	\$ (125.00)	Ala Membership Dues
Dec-25	135	1 -02-13-2220-5810	DUES & FEES	\$ 125.00	Ala Membership Dues
Dec-25	139	1 -05-13-2212-5611	INSTRUCTIONAL SUPPLIES	\$ (2,850.00)	PI Facilitator Stipends
Dec-25	139	1 -05-13-2213-5111	CERTIFIED SALARIES	\$ 2,850.00	PI Facilitator Stipends
Dec-25	200	1 -03-13-2220-5690	OTHER SUPPLIES	\$ (300.00)	Transfer To Cover Conference
Dec-25	200	1 -03-13-2220-5810	DUES & FEES	\$ 300.00	Transfer To Cover Conference
Dec-25	201	1 -03-13-2220-5690	OTHER SUPPLIES	\$ (1,500.00)	Transfer To Purchase Books
Dec-25	201	1 -03-13-2220-5642	TEXTS & DIGITAL RESOURCES	\$ 1,500.00	Transfer To Purchase Books
Dec-25	220	1 -01-11-3201-5590	OTHER PURCH SERVICES	\$ (180.00)	Amc Maa Math Competition
Dec-25	220	1 -01-11-1009-5810	DUES & FEES	\$ 180.00	Amc Maa Math Competition
JAN					
Jan-26	63	1 -02-13-2400-5810	DUES & FEES	\$ (1,000.00)	Funds Needed For Staff Travel
Jan-26	63	1 -02-13-2400-5580	STAFF TRAVEL	\$ 1,000.00	Funds Needed For Staff Travel
Jan-26	293	1 -03-11-1010-5440	RENTALS-LAND,BLDG,EQUIPMEN	\$ (21.00)	For Piano Tuning Needed
Jan-26	293	1 -03-11-1010-5420	REPAIRS,MAINTENANCE & CLEAN	\$ 21.00	For Piano Tuning Needed
FEB					
Feb-26	33	1 -02-11-1005-5330	PROFESSIONAL & TECH SRVC	\$ (1,000.00)	To Purchase Classroom Supplies
Feb-26	33	1 -02-11-1005-5611	INSTRUCTIONAL SUPPLIES	\$ 1,000.00	To Purchase Classroom Supplies
Feb-26	70	1 -01-11-1016-5611	INSTRUCTIONAL SUPPLIES	\$ (35.00)	Ct Reading Assoc. Membership
Feb-26	70	1 -01-11-1016-5810	DUES & FEES	\$ 35.00	Ct Reading Assoc. Membership
Feb-26	95	1 -05-14-2320-5690	OTHER SUPPLIES	\$ 600.00	Co Office Supplies
Feb-26	95	1 -05-14-2320-5810	DUES & FEES	\$ (600.00)	Co Office Supplies
Feb-26	108	1 -02-11-1008-5611	INSTRUCTIONAL SUPPLIES	\$ 96.00	Tech Ed Supply Price Increase
Feb-26	108	1 -02-11-1015-5611	INSTRUCTIONAL SUPPLIES	\$ (96.00)	Tech Ed Supply Price Increase
Feb-26	129	1 -01-13-2220-5642	LIBRARY BOOKS & PERIODICALS	\$ (2,500.00)	Media Ctr Activity Supplies
Feb-26	129	1 -01-13-2220-5690	OTHER SUPPLIES	\$ 2,500.00	Media Ctr Activity Supplies
Feb-26	131	1 -01-13-2400-5690	OTHER SUPPLIES	\$ (15.00)	Classroom Supplies
Feb-26	131	1 -01-11-1001-5611	INSTRUCTIONAL SUPPLIES	\$ 15.00	Classroom Supplies
Feb-26	155	1 -01-11-1005-5611	INSTRUCTIONAL SUPPLIES	\$ (885.00)	Conference - Whats New In Lit
Feb-26	155	1 -05-13-2213-5581	TRAVEL - CONFERENCES	\$ 885.00	Conference - Whats New In Lit
Feb-26	174	1 -05-14-2320-5690	OTHER SUPPLIES	\$ 1,000.00	Co Office Supplies
Feb-26	174	1 -05-14-2320-5580	STAFF TRAVEL	\$ (1,000.00)	Co Office Supplies
Feb-26	190	1 -01-11-1016-5611	INSTRUCTIONAL SUPPLIES	\$ (370.00)	Reading Conference
Feb-26	190	1 -01-11-1016-5810	DUES & FEES	\$ 370.00	Reading Conference
MAR					
Mar-26	4	1 -03-13-2130-5581	TRAVEL - CONFERENCES	\$ (150.00)	Supplies For Nurses Office
Mar-26	4	1 -03-13-2130-5810	DUES & FEES	\$ (100.00)	Supplies For Nurses Office
Mar-26	4	1 -03-13-2130-5690	OTHER SUPPLIES	\$ 250.00	Supplies For Nurses Office
Mar-26	53	1 -01-11-1005-5330	PROFESSIONAL & TECH SRVC	\$ (1,000.00)	Purchase Reading Supplies
Mar-26	53	1 -01-11-1005-5611	INSTRUCTIONAL SUPPLIES	\$ 1,000.00	Purchase Reading Supplies
Mar-26	65	1 -01-11-3201-5690	OTHER SUPPLIES	\$ (1,435.00)	Tower Garden Flex Planter
Mar-26	65	1 -01-11-3201-5730	EQUIPMENT - NEW	\$ 1,435.00	Tower Garden Flex Planter
Mar-26	68	1 -03-13-2220-5810	DUES & FEES	\$ (75.00)	Professional Tech Services
Mar-26	68	1 -03-13-2220-5330	PROFESSIONAL & TECH SRVC	\$ 75.00	Professional Tech Services
Mar-26	85	1 -04-12-2151-5690	OTHER SUPPLIES	\$ (1,075.00)	Emergency Kit Lock Cabinet
Mar-26	85	1 -03-13-2130-5690	OTHER SUPPLIES	\$ 1,075.00	Emergency Kit Lock Cabinet
Mar-26	97	1 -01-13-2220-5611	INSTRUCTIONAL SUPPLIES	\$ (394.00)	Kindles For Media Center
Mar-26	97	1 -01-13-2220-5642	LIBRARY BOOKS & PERIODICALS	\$ 394.00	Kindles For Media Center
Mar-26	145	1 -01-13-2220-5690	OTHER SUPPLIES	\$ (300.00)	Books
Mar-26	145	1 -01-13-2220-5642	LIBRARY BOOKS & PERIODICALS	\$ 300.00	Books
Mar-26	146	1 -05-14-2320-5581	TRAVEL - CONFERENCES	\$ 250.00	Co Staff Conferences
Mar-26	146	1 -05-14-2320-5580	STAFF TRAVEL	\$ (250.00)	Co Staff Conferences
Mar-26	147	1 -03-13-2400-5580	STAFF TRAVEL	\$ 1,500.00	Transfer For Mileage Reimburse
Mar-26	147	1 -03-13-2400-5581	TRAVEL - CONFERENCES	\$ (1,500.00)	Transfer For Mileage Reimburse
Mar-26	151	1 -05-13-2213-5322	INSTRUCTIONAL PROG IMPROVEI	\$ (1,000.00)	Facilitator Stipends
Mar-26	151	1 -05-13-2213-5111	CERTIFIED SALARIES	\$ 1,000.00	Facilitator Stipends
Mar-26	161	1 -04-12-1200-5611	INSTRUCTIONAL SUPPLIES	\$ (7.49)	Special Edu Teacher Supplies
Mar-26	161	1 -04-12-1200-5690	OTHER SUPPLIES	\$ 7.49	Special Edu Teacher Supplies

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

MONTH/YR	JNL#	ACCOUNT NUMBER & DESCRIPTION	AMOUNT	DESCRIPTION
Mar-26	172	1 -02-14-2600-5613 MAINTENANCE/CUSTODIAL SUPP	\$ (1,466.98)	Replace Fridge
Mar-26	172	1 -02-14-2600-5731 EQUIPMENT - REPLACEMENT	\$ 1,466.98	Replace Fridge
Mar-26	173	1 -04-12-1203-5690 OTHER SUPPLIES	\$ (1,980.96)	Sails Amso Equipment Homedepot
Mar-26	173	1 -04-12-1203-5731 EQUIPMENT - REPLACEMENT	\$ 1,980.96	Sails Amso Equipment Homedepot
Mar-26	214	1 -01-11-1015-5810 DUES & FEES	\$ (350.00)	Classroom Supplies
Mar-26	214	1 -01-11-1015-5611 INSTRUCTIONAL SUPPLIES	\$ 350.00	Classroom Supplies
Mar-26	215	1 -01-11-1008-5420 REPAIRS,MAINTENANCE & CLEAN	\$ (803.00)	Tech Ed Supplies
Mar-26	215	1 -01-11-1008-5810 DUES & FEES	\$ (250.00)	Tech Ed Supplies
Mar-26	215	1 -01-11-1008-5611 INSTRUCTIONAL SUPPLIES	\$ 1,053.00	Tech Ed Supplies
Mar-26	216	1 -02-11-1010-5611 INSTRUCTIONAL SUPPLIES	\$ (28.00)	Chair Rental For Concert
Mar-26	216	1 -02-11-1010-5440 RENTALS-LAND,BLDS	\$ 28.00	Chair Rental For Concert
Mar-26	223	1 -03-11-1007-5730 EQUIPMENT - NEW	\$ (748.30)	Culinary Course Supplies
Mar-26	223	1 -03-11-1007-5611 INSTRUCTIONAL SUPPLIES	\$ 748.30	Culinary Course Supplies
Mar-26	226	1 -02-11-1014-5810 DUES & FEES	\$ (50.00)	Purchase Resources-8Thgr.Curr.
Mar-26	226	1 -02-11-1014-5611 INSTRUCTIONAL SUPPLIES	\$ 50.00	Purchase Resources-8Thgr.Curr.
Mar-26	241	1 -05-13-2212-5590 OTHER PURCHASED SERVICES	\$ (2,500.00)	Retirement Gifts
Mar-26	241	1 -05-13-2213-5690 OTHER SUPPLIES	\$ 2,500.00	Retirement Gifts
Mar-26	242	1 -01-11-1014-5641 TEXTBOOKS	\$ (160.00)	Purchase History Supplies
Mar-26	242	1 -01-11-1014-5330 PROFESSIONAL & TECH SRVC	\$ (275.00)	Purchase History Supplies
Mar-26	242	1 -01-11-1014-5611 INSTRUCTIONAL SUPPLIES	\$ 435.00	Purchase History Supplies
Mar-26	249	1 -03-11-1008-5420 REPAIRS,MAINTENANCE & CLEAN	\$ (1,674.28)	Tech Ed Supplies
Mar-26	249	1 -03-11-1008-5611 INSTRUCTIONAL SUPPLIES	\$ 1,674.28	Tech Ed Supplies
Mar-26	256	1 -01-14-2600-5613 MAINTENANCE/CUSTODIAL SUPP	\$ (621.18)	Diesel Delivery
Mar-26	256	1 -01-14-2600-5620 OIL USED FOR HEATING	\$ 621.18	Diesel Delivery
Mar-26	258	1 -03-14-2600-5613 MAINTENANCE/CUSTODIAL SUPP	\$ (554.87)	Diesel Delivery
Mar-26	258	1 -03-14-2600-5620 OIL USED FOR HEATING	\$ 554.87	Diesel Delivery
Mar-26	287	1 -03-11-1008-5810 DUES & FEES	\$ (80.00)	Tech Ed Supplies
Mar-26	287	1 -03-11-1008-5611 INSTRUCTIONAL SUPPLIES	\$ 80.00	Tech Ed Supplies
Mar-26	308	1 -03-11-1011-5330 PROFESSIONAL & TECH SRVC	\$ (660.00)	Pe/Health Instructional Supply
Mar-26	308	1 -03-11-1011-5611 INSTRUCTIONAL SUPPLIES	\$ 660.00	Pe/Health Instructional Supply
Mar-26	311	1 -01-11-1011-5420 REPAIRS,MAINTENANCE & CLEAN	\$ (1,000.00)	Pe Supplies
Mar-26	311	1 -01-11-1011-5611 INSTRUCTIONAL SUPPLIES	\$ 1,000.00	Pe Supplies
Mar-26	377	1 -03-11-1014-5690 OTHER SUPPLIES	\$ (1,000.00)	Ap Course Training
Mar-26	377	1 -03-11-1014-5810 DUES & FEES	\$ 1,000.00	Ap Course Training
Mar-26	381	1 -03-11-1010-5440 RENTALS-LAND,BLDG,EQUIPMEN	\$ (779.00)	Music Instructional Supplies
Mar-26	381	1 -03-11-1010-5611 INSTRUCTIONAL SUPPLIES	\$ 779.00	Music Instructional Supplies

*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: March 30, 2026

Special Education:

Mr. Brant is requesting four budget transfers this month:

1. This budget transfer of \$3,000 addresses an anticipated deficit related to transportation due to services required by McKinney-Vento to support a family currently experiencing housing instability.
2. This budget transfer of \$18,100 addresses a shortfall in tuition due to the cost of special education services that students receive at Vo-Ag/Magnet schools. Students can attend these schools as part of Connecticut's School Choice Program, often when Amity does not offer four year programs in their desired area of interest (this can include agricultural, Long Island Sound Studies (Marine Biology), International Studies, Bioengineering, etc..)
3. This budget transfer of \$9,000 moves funds from certified salaries to professional/technical within the Homebound account. Amity contracts with third party providers to provide homebound services for students when Amity teachers are unable to provide these services. Students are eligible for homebound instruction, per Connecticut General Statutes, when they have missed 10 consecutive days of school due to a documented medical condition, and a recommendation for homebound services is made by a medical doctor.
4. This budget transfer of \$43,000 allocates funds for payment for a special education teacher who has been hired through a third-party agency to cover two extended long-term maternity leaves. This teacher was hired in November, and this budget transfer covers the second half of coverage.

Motions to approve all 4 special education transfers together:

For the Amity Finance Committee:

Recommend the Amity Board of Education approve all 4 special education transfers...

For the Amity Board of Education:

Motions:

Move to approve all 4 special education transfers as listed below.

OR

1. For the Amity Finance Committee:

Recommend the Amity Board of Education approve...

For the Amity Board of Education:

Move to approve this transfer for transportation services required under McKinney-Vento.

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
04-12-6130-5560	Tuition – Private Out	\$3,000	
05-14-2700-5512	Transportation – Vo-Ag		\$3,000

2. For the Amity Finance Committee:

Recommend the Amity Board of Education approve...

For the Amity Board of Education:

Move to approve this transfer for special education services provided at Vo-Ag/Magnet Schools the District is responsible to support.

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
04-12-6130-5560	Tuition – Private Out	\$18,100	
04-12-6111-5560	Tuition – Vo-Ag/Magnet		\$18,100

3. For the Amity Finance Committee:

Recommend the Amity Board of Education approve...

For the Amity Board of Education:

Move to approve this transfer for homebound services.

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
04-15-1204-5111	Certified Salaries	\$ 9,000	
04-15-1204-5330	Professional Technical Services		\$9,000

4. For the Amity Finance Committee:

Recommend the Amity Board of Education approve...

For the Amity Board of Education:

Move to approve this transfer for professional teaching services to cover a vacant position.

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
01-13-2140-5111	Certified Salaries	\$ 6,920	
04-12-1203-5111	Professional Technical Services	\$15,488	
04-12-6110-5560	Tuition – Public Out	\$20,592	
04-12-1206-5330	Professional Technical Services		\$43,000

Facilities:

Mr. Martoni is requesting two budget transfers this month.

The first transfer of \$46,661 is to cover the cost of snowplowing, salting and sanding at the high school and AMSO All 3 schools are over budget, but AMSB can cover the \$2,887 from their 540 The high school and AMSO need transfers to cover the overages.

The second transfer of \$4,508 is to cover the cost of the backstop fence repairs on the high school baseball and softball fields. \$10,000 was budgeted and the cost is \$14,508 to fix both.

Move to approve both facilities transfers as listed below.

OR

1. For the Amity Finance Committee:

Recommend the Amity Board of Education approve...

For the Amity Board of Education:

Move to approve this transfer for snowplowing, salting and sanding services.

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
05-14-2600-5715	Contingency - Facilities	\$46,661	
02-14-2600-5420	Repair & Maintenance		\$ 7,149
03-14-2600-5420	Repair & Maintenance		\$39,512

2. For the Amity Finance Committee:

Recommend the Amity Board of Education approve...

For the Amity Board of Education:

Move to approve this transfer for backstop fence repairs at the high school.

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
05-14-2600-5715	Contingency - Facilities	\$5,408	
03-14-2600-5720	Improvements to Sites		\$5,408

AMSO Furniture:

Ms. Burke is requesting a budget transfer this month for furniture using the remaining balance in several accounts. The furniture requested is chorus risers.

1. For the Amity Finance Committee:

Recommend the Amity Board of Education approve...

For the Amity Board of Education:

Move to approve this transfer for furniture for chorus risers.

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
02-11-1010-5731	Equipment – Replacement	\$1,767	
02-11-1010-5810	Dues & Fees	\$ 30	
02-13-2120-5330	Professional Technical Services	\$ 2,300	
02-13-2400-5581	Travel-Conferences	\$ 2,063	
02-13-2400-5731	Equipment-Replacement	\$ 161	
02-13-2120-5590	Other Purchase Services	\$ 650	
02-13-2400-5810	Dues & Fees	\$ 599	
02-11-1010-5730	Furniture- New		\$ 7,570

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: Food Service Update

Date: March 30, 2026

The cafeteria program is running a deficit this year. The projected forecast is a loss of \$71,659. Our contract with Chartwells provides a guarantee of up to \$24,304 less mitigating factors to breakeven, meaning Chartwells may be covering a portion of the ending deficit. The fund balance at the start of the year was \$258,142.

One of the contributing factors is the increased number of students that have negative balances. There are 150 students that owe \$7,394.09. There are 10 individual students with debt over \$250, ranging from \$256.15 to \$505.40. Only 2 of the families with balances over \$50.00 are on reduced meals, the remaining are full pay students. None of the full pay students' parents have completed an application for free or reduced meals.

There is a decline year-over-year in ala carte sales. It is hard to pinpoint the exact reasons, but students with a negative balance cannot purchase ala carte, and the number of students with a negative balance has increased. Ala carte sales are down \$19,073 in 2026.

There is a decline in breakfast sales since the State no longer subsidizes reduced students to have a free breakfast. There were several shortened school days due to weather, limiting cafeteria time for students. There is a slight increase in the number of students on free and reduced lunch this year, the decline in meal sales is across all students.

There has been \$38,000 spent on repairs of the cafeteria equipment year to date. The main calls related to the walk-in freezers at all 3 schools and a steamer oven at ARHS. The high school walk-in cooler refrigeration unit is 30 years old and may need replacement in the near future. The refrigeration unit in the walk-in freezer failed last year. Both were installed at the same time. Replacement is approximately \$23,500.

The cafeteria has managed to cover staff who are on paid leave with other staff extending their shifts, but at a higher cost. Staffing levels are being reviewed and may be adjusted at each of the schools to reflect the actual sales volume.

The participation rates compared through the month of February (most recent month) are:

SCHOOL	2025 BREAKFAST	2025 LUNCH	2026 BREAKFAST	2026 LUNCH
AMSB	Not Applicable	43.17%	Not Applicable	41.2%
AMSO	Not Applicable	31.1%	Not Applicable	31.3%
ARHS	2.2%	39.3%	1.9%	37.0%

There is currently nothing proposed in the 2026-2027 budget proposal to support the School Lunch Account. I do not expect to request a transfer into the cafeteria funds from the general fund this fiscal year. If the trend continues, we will in the future deplete the fund balance that accumulated from Board transfers in 2020 and 2021 and the additional subsidies available during the pandemic.

Q3 FY26 CNR

ORG	OBJ	ACCOUNT DESCRIPTION	ORIGINAL APPROP	TRANFRS/ADJS MTS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	% USED
00150053	5715	IMPROV-BLD	8,554	0	8,554	8,554	0	0	100.00
00150053		Total 00150053 2020 Bond Contingenc	8,554	0	8,554	8,554	0	0	100.00
00150054	5715	IMPROV-BLD	690	0	690	0	0	690	0.00
00150054		Total 00150054 AHS ROOF REPLACEMENT	690	0	690	0	0	690	0.00
00150060	5420	REP,MAINT	57,704	0	57,704	36,460	20,000	1,244	97.80
00150060		Total 00150060 LIGHTING PROJECT	57,704	0	57,704	36,460	20,000	1,244	97.80
00150064	5420	REP,MAINT	120,193	0	120,193	0	0	120,193	0.00
00150064		Total 00150064 AHS ALL WEATHER FIEL	120,193	0	120,193	0	0	120,193	0.00
00150065	5715	IMPROV-BLD	1,821,676	0	1,821,676	8,332	44,602	1,768,742	2.90
00150065		Total 00150065 AHS LMC RENOVATION	1,821,676	0	1,821,676	8,332	44,602	1,768,742	2.90
00150099	5899	UNDESIGNAT	0	35,169	35,169	0	0	35,169	0.00
00150099		Total 00150099 UNDESIGNATED	0	35,169	35,169	0	0	35,169	0.00
		Total	2,008,816	35,169	2,043,985	53,346	64,602	1,926,037	5.90

Q3 FY26 ED RESERVE

ORG	OBJ	ACCOUNT DESCRIPTION	ORIGINAL APPROP	TRANFRS/ADJISM TS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	% USED
00150100	5715	IMPROV-BLD	1,091,054	679,132	1,770,186	29,190	12,310	1,728,686	2.30
		Total 00150100 LMC							
00150100		RENOVATIONS	1,091,054	679,132	1,770,186	29,190	12,310	1,728,686	2.30
00150104	5715	IMPROV-BLD	200,000	0	200,000	0	0	200,000	0.00
		Total 00150104							
00150104		INFRASTRUCTURE -TECH	200,000	0	200,000	0	0	200,000	0.00
00150105	5715	IMPROV-BLD	250,000	0	250,000	0	148,250	101,750	59.30
		Total 00150105 AMSB FIRE							
00150105		PUMP REPLA	250,000	0	250,000	0	148,250	101,750	59.30
00150199	5899	UNDESIGNAT	496	28,052	28,548	0	0	28,548	0.00
		Total 00150199							
00150199		UNDESIGNATED	496	28,052	28,548	0	0	28,548	0.00
21		Total 21 Reserve For Educational Ex	1,541,550	707,184	2,248,734	29,190	160,560	2,058,984	0.00

Q3 FY26 GRANTS

ORG	OBJ	ACCOUNT DESCRIPTION	ORIGINAL APPROP	TRANFRS/ADJIS MTS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	% USED
00008985	5330	PROF&TECH	1,900	16,100	18,001	18,000	0	0	100.00
00008985	5715	IMPROV-BLD	14,755	-14,755	0	0	0	0	0.00
00008985	5730	EQUIP-NEW	315	-315	0	0	0	0	0.00
00008985	5731	EQUIP-REPL	9,208	-1,030	8,178	0	0	8,178	0.00
		Total 00008985 FEMA							
00008985		COVID-19	26,179	0	26,179	18,000	0	8,179	68.80
00009002	600	SUPPLIES	9,210	0	9,210	0	0	9,210	0.00
		Total 00009002 Science Research Awa	9,210	0	9,210	0	0	9,210	0.00
00009003	5899	UNDESIGNAT	52,877	8,469	61,346	20,741	3,928	36,677	40.20
		Total 00009003 MEDICAID GRANT	52,877	8,469	61,346	20,741	3,928	36,677	40.20
00009004	5899	UNDESIGNAT	370	0	370	150	0	220	40.50
		Total 00009004 PRESCRIPTION DRUG SA	370	0	370	150	0	220	40.50
00009005	5899	UNDESIGNAT	15,489	2,382	17,871	2,394	0	15,477	13.40
		Total 00009005 CBITS SUSTAINABILITY	15,489	2,382	17,871	2,394	0	15,477	13.40
00009006	5899	UNDESIGNAT	2,000	0	2,000	0	0	2,000	0.00
		Total 00009006 INCREASE EDUCATOR DI	2,000	0	2,000	0	0	2,000	0.00
00009007	600	SUPPLIES	1,000	0	1,000	767	0	233	76.70
		Total 00009007 BENTLEY GRANT AMSO	1,000	0	1,000	767	0	233	76.70
00009037	100	SALARIES	14,381	9,000	23,381	1,028	0	22,353	4.40
00009037	300	PROFESSION	3,250	-3,250	0	0	0	0	0.00
00009037	500	OTHER PURC	9,000	-9,000	0	0	0	0	0.00
00009037	600	SUPPLIES	12,376	3,250	15,626	11,931	1,922	1,773	88.70
		Total 00009037 ARPA-DUAL CREDIT EXP	39,007	0	39,007	12,959	1,922	24,126	38.10
00009039	5330	PROF&TECH	15,983	0	15,983	5,220	580	10,183	36.30
00009039	5732	EQ-TECH-N	35,433	-15,983	19,450	19,450	0	0	100.00
		Total 00009039 EMERGENCY CONNECTIVI	51,417	-15,983	35,433	24,670	580	10,183	71.30
00009047	100	SALARIES	6,788	0	6,788	6,788	0	0	100.00

Q3 FY26 GRANTS

ORG	OBJ	ACCOUNT DESCRIPTION	ORIGINAL APPROP	TRANFRS/ADJIS MTS	REVISED BUDGET	YTD EXPENDED		ENCUMBRANCES	AVAILABLE BUDGET	% USED
00009047	300	PROFESSION	3,166	0	3,166	3,112	0	0	54	98.30
00009047	600	SUPPLIES	214	0	214	0	214	0	0	100.00
00009047		Total 00009047 TITLE I								
00009047		2024-2026	10,168	0	10,168	9,900	214	0	54	99.50
00009048	100	SALARIES	14,040	0	14,040	0	0	0	14,040	0.00
00009048	300	PROFESSION	5,653	0	5,653	2,654	0	0	2,999	47.00
00009048	500	OTHER PURC	1,640	0	1,640	0	0	0	1,640	0.00
00009048		Total 00009048 TITLE II								
00009048		2024-2026	21,333	0	21,333	2,654	0	0	18,679	12.40
00009049	600	SUPPLIES	744	0	744	227	459	0	57	92.30
00009049		Total 00009049 TITLE III								
00009049		2024-2026	744	0	744	227	459	0	57	92.30
00009050	100	SALARIES	7,456	0	7,456	7,456	0	0	0	100.00
00009050	300	PROFESSION	1,600	0	1,600	1,600	0	0	0	100.00
00009050		Total 00009050 TITLE IV								
00009050		2024-2026	9,056	0	9,056	9,056	0	0	0	100.00
00009051	112	SALARIES N	165,766	0	165,766	165,766	0	0	0	100.00
00009051	200	MEDICARE	5,310	0	5,310	5,310	0	0	0	100.00
00009051	322	INSTR PROG	1,680	4,920	6,600	5,605	966	0	29	99.60
00009051	324	FIELD TRIP	9,000	-4,500	4,500	3,154	3	0	1,343	70.20
00009051	325	PARENT ACT	475	0	475	0	0	0	475	0.00
00009051	580	TRAVEL-STA	8,125	0	8,125	5,974	2,151	0	0	100.00
00009051	600	SUPPLIES	7,121	-420	6,701	6,437	0	0	263	96.10
00009051	600NP	SUPPLY NP	1,652	0	1,652	1,652	0	0	0	100.00
00009051		Total 00009051 IDEA FY								
00009051		2024-2026	199,129	0	199,129	193,899	3,119	0	2,111	98.90
00009052	100	SALARIES	6,448	0	6,448	6,448	0	0	0	100.00
00009052	200	MEDICARE	4,646	0	4,646	4,646	0	0	0	100.00
00009052		Total 00009052 ARPA-								
00009052		SCHOOL MENTAL H	11,094	0	11,094	11,094	0	0	0	100.00
00009054	300	PROFESSION	4,000	0	4,000	4,661	0	0	-661	116.50
00009054	600	SUPPLIES	1,397	0	1,397	574	162	0	661	52.70
00009054		Total 00009054 LOCAL								
00009054		PREVENTION COU	5,397	0	5,397	5,235	162	0	0	100.00
00009056	700	PROPERTY	12,000	0	12,000	11,727	201	0	72	99.40

Q3 FY26 GRANTS

ORG	OBJ	ACCOUNT DESCRIPTION	ORIGINAL APPROP	TRANFRS/ADJIS MTS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	% USED
00009056		Total 00009056 PEGPETIA GRANT FY25	12,000	0	12,000	11,727	201	72	99.40
00009057	5899	UNDESIGNAT	10,000	0	10,000	10,000	0	0	100.00
00009057		Total 00009057 CAC FY26	10,000	0	10,000	10,000	0	0	100.00
00009058	100	SALARIES	53,428	0	53,428	40,449	15,572	-2,593	104.90
00009058	300	PROFESSION	19,027	0	19,027	0	0	19,027	0.00
00009058	600	SUPPLIES	5,216	0	5,216	0	0	5,216	0.00
00009058		Total 00009058 TITLE I	77,671	0	77,671	40,449	15,572	21,650	72.10
00009059	100	SALARIES	14,127	0	14,127	0	0	14,127	0.00
00009059	300	PROFESSION	15,629	0	15,629	0	0	15,629	0.00
00009059	500	OTHER PURC	1,900	0	1,900	0	0	1,900	0.00
00009059		Total 00009059 TITLE II	31,656	0	31,656	0	0	31,656	0.00
00009061	100	SALARIES	8,400	0	8,400	0	0	8,400	0.00
00009061	300	PROFESSION	1,600	0	1,600	0	0	1,600	0.00
00009061		Total 00009061 TITLE IV	10,000	0	10,000	0	0	10,000	0.00
00009062	100	SALARIES	86,428	0	86,428	59,834	30,114	-3,520	104.10
00009062	112	SALARIES N	352,822	0	352,822	76,277	115,093	161,452	54.20
00009062	200	MEDICARE	5,310	0	5,310	0	0	5,310	0.00
00009062	322	INSTR PROG	1,680	0	1,680	0	0	1,680	0.00
00009062	324	FIELD TRIP	7,800	0	7,800	0	0	7,800	0.00
00009062	325	PARENT ACT	500	0	500	0	0	500	0.00
00009062	580	TRAVEL-STA	8,325	0	8,325	0	0	8,325	0.00
00009062	600	SUPPLIES	7,549	-1,179	6,370	0	0	6,370	0.00
00009062	600NP	SUPPLY NP	1,700	-146	1,554	0	0	1,554	0.00
00009062		Total 00009062 IDEA FY	472,113	-1,325	470,788	136,111	145,206	189,471	59.80
00009063	100	SALARIES	47,748	0	47,748	23,361	21,591	2,796	94.10
00009063		Total 00009063 ARPA-	47,748	0	47,748	23,361	21,591	2,796	94.10
00009064	111B	SCHOOL MENTAL H	1,090	0	1,090	1,090	0	0	100.00
00009064	330	OTHER PROF	1,730	0	1,730	1,730	0	0	100.00

Q3 FY26 GRANTS

ORG	OBJ	ACCOUNT DESCRIPTION	ORIGINAL APPROP	TRANSFRS/ADJIS MTS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	% USED
00009064	510	TRANSPORTA	3,000	-1,500	1,500	0	0	1,500	0.00
00009064	580	TRAVEL-STA	3,901	0	3,901	3,899	0	2	99.90
00009064	600	SUPPLIES	7,222	1,500	8,722	7,222	1,495	6	99.90
00009064	700	PROPERTY	26,857	0	26,857	26,857	0	0	100.00
		Total 00009064 CARL							
00009064		PERKINS FY26	43,800	0	43,800	40,798	1,495	1,508	96.60
00009065	300	PROFESSION	4,500	0	4,500	500	0	4,000	11.10
00009065	600	SUPPLIES	1,396	0	1,396	0	80	1,316	5.70
		Total 00009065 LOCAL PREVENTION COU	5,896	0	5,896	500	80	5,316	9.80
		Grand Total	1,165,350	-6,457	1,158,893	574,692	194,529	389,672	66.40

Personnel

Recruitment and Selection of Administrative Staff

In accordance with Connecticut General Statutes §10-151, the Amity Regional School District No. 5 (District) Board of Education (Board) delegates to the Superintendent the authority to employ all certified professional staff below the rank of superintendent, including school administrators, supervisors, and directors, as well as certified and non-certified support staff.

The Superintendent, as the chief executive officer of the Board, shall be responsible for providing the professional leadership and administrative skills necessary to translate the Board's goals and policies into effective educational practice. In fulfilling this role, the Board recognizes the Superintendent's responsibility for leading and maintaining a highly qualified administrative team.

The Superintendent shall be responsible for posting administrative positions, recruiting, and screening candidates. When conducting an administrative search, the Superintendent shall keep the Board of Education informed and may solicit advice regarding desired leadership qualities or district needs. A minimum of two members of the Board of Education shall be invited to participate in the interview and selection process for senior administrative staff. Senior administrative staff includes all district-level Directors and school principals.

Prior to selection of a finalist, the Superintendent shall present, in Executive Session at a regular or special meeting of the Board, a summary of the qualifications and interview results of at least two and no more than three candidates to the Board of Education. The Board shall provide feedback on the candidates' qualifications prior to the final reference check. Upon completion of the final reference check, the Superintendent shall present a recommended finalist to the Board for approval by vote. Such presentation shall include the title of the position, the appointee's name, and a brief summary of the individual's professional background.

All appointments shall be made in accordance with state law, Board policies, applicable collective bargaining agreements, and equal employment opportunity requirements.

Legal Reference: Connecticut General Statutes

10-151 Employment of teachers. Notice and hearing on termination of contract (as amended by P.A. 12-116 An Act Concerning Educational Reform)

10-153 Discrimination on account of marital status.

10-183v Reemployment of teachers, as amended by P.A. 10-111, An Act Concerning Education Reform in Connecticut, P.A. 16-91, An Act Making Changes to the Teachers' Retirement System, and PA 17-173 An Act Concerning Minor Revisions and Additions to the Education Statutes and PA 18-42 An Act Concerning a Provision Concerning Reemployment of Certain Teachers.

Policy Updated:

AMITY REGIONAL SCHOOL DISTRICT NO. 5
Woodbridge, Connecticut

Personnel

Recruitment and Selection of Administrative Staff

10-220 Duties of Boards of Education.

31-126 Unfair Employment Practices.

46a-60 Discriminatory employment practices prohibited.

Title IV Equal Employment Opportunities.

34 C.F.R. 200.55 Federal Regulations.

P.L. 114-95 Every Student Succeeds Act, S.1177-55, 56.

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



Dr. Jennifer P. Byars
Superintendent of Schools

jennifer.byars@amityregion5.org
203.392.2106

April 6, 2026

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:**

Jonathan Guilherme – F/T Special Education Teacher – Jonathan completed his student teaching at Bethany Community School. While pursuing his graduate studies, he served as a Paraprofessional for three years, also at Bethany Community School. Jonathan earned a Bachelor’s Degree in Management from Clark University and his Master’s Degree in Special Education from Quinnipiac University.

Steven Ayala – F/T Social Studies Teacher – Steven completed his student teaching in the Pawtucket, Rhode Island School District. Earning his teaching certification in both Rhode Island and Connecticut, Steven has been a part of the Amity family since 2023 having served in several long-term social studies substitute teacher assignments as well as serving as a bench substitute at Amity Regional High School. Steven earned his Bachelor’s Degrees in both Secondary Education and History from University of Rhode Island. He has also recently earned his Master’s Degree in Curriculum and Instruction from Southern Connecticut State University.

• **Amity Regional Middle School – Bethany: NONE**

• **Amity Regional Middle School – Orange: NONE**

NEW HIRES-BENCH/LONG TERM SUBSTITUTES/TUTORS:

Kaitlyn Moore-Markey – Long Term Substitute Special Education Tutor – Amity Regional High School

NEW HIRES-NON-CERTIFIED:

Jacqueline Hanson – Paraprofessional – Amity Regional High School

Tatiana Buzzoni – Paraprofessional – Amity Middle School-Orange

Kiera Filush – Paraprofessional – Amity Regional High School

NEW HIRES-COACHES:

Kelly Borer – Softball Coach – 2026 Spring Season – Amity Middle School-Bethany

Stephanie Esposito – Asst. Girls Lacrosse Coach – 2026 Spring Season – Amity Reg. High School

Mathew Najmowicz – Volleyball Coach – 2026 Spring Season – Amity Middle School-Bethany

TRANSFERS:

Thomas Ward – F/T English Teacher at Amity Middle School-Bethany to the position of F/T English Teacher and Department Head at Amity Regional High School, effective 07/01/2026.

RESIGNATIONS:

Jonathan Lamont – Special Education Teacher – Amity Regional High School, eff 6/17/2026

RETIREMENTS: NONE