PLEASE POST **PLEASE POST**

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, August 17, 2026, 6:30 pm
25 Newton Road, Woodbridge, CT
Lecture Hall

1. **CALL TO ORDER**
2. **PLEDGE OF ALLEGIANCE**
3. **APPROVAL OF MINUTES**
   a. Board of Education Special Meeting - June 22, 2026 page 4
4. **PUBLIC COMMENT**
5. **SUPERINTENDENT'S REPORT**
   a. Superintendent Report
   b. Discussion and Possible Action on Proposed 2026-2027 BOE Meeting and Committee Dates page 6
6. **CORRESPONDENCE**
7. **CHAIRMAN'S REPORT**
   a. Committee Reports
      1. ACES
      2. Ad Hoc School Start Time Committee
      3. CABE
      4. Communications
      5. Curriculum
      6. District Health and Safety
      7. District Technology page10
         a. Monthly Report
      8. Facilities page 11
         a. Monthly Report
      9. Finance
         a. Presentation of 2027-2028 Budget Calendar page 12
         b. Presentation of Annual Report on Reserve Funds for Capital and Non-recurring Expenditures and Educational Expenditures page 17
         c. Discussion and Possible Action on Designation of Unexpended Funds to the Reserve Fund for Educational Expenditures page 20
         d. Discussion and Possible Action on ARHS -LMC Revised Cost Estimate Recommendations to the Amity Board of Education page 23
         e. Discussion of Monthly Financial Statement page 26
            i. Fiscal Year 2025-2026
            ii. Fiscal Year 2026-2027
            iii. Special Education Update FY27 by Mr. Brant
         f. Director of Finance and Administration Approved Transfers EOY – FY26 page 70

g. Director of Finance and Administration Approved Transfers under $3,000 -FY27 **page 76**

10. Policy
    a. Second Reads
        i. Policy 5131 Conduct and Discipline **page 77**
        ii. Policy 6146.1 Grading/Assessment Systems **page 101**
11. Personnel
    a. Personnel Report **page 106**

8. NEW BUSINESS

9. ITEMS FOR THE NEXT AGENDA – Due to Chairperson by August 31, 2026

10. ADJOURNMENT

Jennifer P. Byars

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.

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, June 22, 2026 6:30 pm
25 Newton Road, Woodbridge, CT
Lecture Hall

BOARD MEMBERS PRESENT

Autumn Cloud-Ingram* (arrived at 6:47 p.m.), Paul Davis, Jennifer Blando Jacquet* (arrived at 6:41 p.m.), Dr. Karunakaran, Dana Lombardi, Michael McDonough, Dr. Oladele, Meghan Rabuse, Patrick Reed, Donna Schlank, Donna Schuster, Christian Young

BOARD MEMBERS ABSENT

Bradley

STAFF MEMBERS PRESENT

Dr. Jennifer Byars

1. CALL TO ORDER

Chairperson Davis called the meeting to order at 6:37 p.m.

2. PLEDGE OF ALLEGIANCE

Led by Amity Board of Education Chair Paul Davis

3. APPROVAL OF MINUTES

a. Board of Education Regular Meeting – June 08, 2026

MOTION by Dana Lombardi SECONDED by Patrick Reed to approve Board of Education Regular Meeting Minutes, June 08, 2026, with minor edit.
VOTES IN FAVOR, 4 (Lombardi, Davis, Schlank, Young)
NOT PRESENT FOR VOTE, 1 (Schuster)
ABSTAIN, 5 (Dr. Karunakaran, McDonough, Dr. Oladele, Rabuse, Reed)
MOTION CARRIES

4. CHAIRMAN'S REPORT

MOTION by Meghan Rabuse, SECONDED by Donna Schlank to enter executive session and invite Dr. Byars to join for agenda Item number 4.a.1 and portions of 4.a.2 and 4.a.3.
VOTES IN FAVOR 11, (UNANIMOUS)
NOT PRESENT FOR VOTE, 1 (Dr. Oladele)
MOTION CARRIES

The Board enters Executive Session at 6:49 p.m.
Dr. Byars exits Executive Session at 8:14 p.m.
The Board exits Executive Session at 9:36 p.m.

a. **Personnel**
   1. **Discussion of Custodial/Maintenance Union Contract for 2026-**

2029 (Anticipated Executive Session)

2. **Discussion of Superintendent Evaluation (Anticipated Executive Session)**
3. **Discussion of Superintendent Contract (Anticipated Executive Session)**

4. **Possible Action on Custodial/Maintenance Union Contract for 2026-2029**

MOTION by Meghan Rabuse, SECONDED by Autumn Cloud-Ingram to approve the Custodial/Maintenance Union Contract for 2026-2029, as submitted.
VOTES IN FAVOR, 12 (UNANIMOUS)
MOTION CARRIES

5. **Possible Action on Superintendent Evaluation**

MOTION by Autumn Cloud-Ingram, SECONDED by Meghan Rabuse to approve the Superintendents Evaluation, as submitted.
VOTES IN FAVOR, 12 (UNANIMOUS)
MOTION CARRIES

6. **Possible Action on Superintendent Contract**

MOTION by Jennifer Blando Jacquet, SECONDED by Donna Schlank to approve the Superintendents Contract, as submitted.
VOTES IN FAVOR, 7 (Cloud-Ingram, Davis, Jacquet, Dr. Karunakaran, Dr. Oladele, Reed, Schlank)
VOTES OPPOSED, 5 (Lombardi, McDonough, Rabuse, Schuster, Young)
MOTION CARRIES

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

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

7. ADJOURNMENT
Chairperson Davis adjourned the meeting, without objection, at 9:41 p.m.

Respectfully submitted,

Lisa Zaleski

Lisa Zaleski
BOE Recording Secretary

Proposed Meeting BOE Schedule 2026-2027

All meetings begin at 6:30 pm unless otherwise noted; all meetings will be held in the Lecture Hall

August 17*	Regular BOE Meeting
September 14*	Regular BOE Meeting
September 28	Special BOE Meeting – State Assessment Data (SBAC, SAT, NGSS); Strategic Planning
October 5*	Regular BOE Meeting
October 19	Special BOE Meeting – TBD; Strategic Planning?
November 9*	Regular BOE Meeting – Next Generation Accountability Data
November 23 – **6:00 pm**	Special BOE Meeting – Department Budget Requests
December 14*	Regular BOE Meeting
December 21	Special BOE Meeting – School Climate Improvement Update
January 11*	Regular BOE Meeting; Superintendent Mid-Year Review
January 25 – **6:00 pm**	Special Meeting – Joint AFC BOE Meeting – Budget Workshop
February 8	Regular BOE Meeting
February 22 – **6:00 pm**	Special Meeting – Joint AFC BOE Meeting – Budget Workshop
March 8	Regular BOE Meeting – Budget Approval Vote
March 22	Special BOE Meeting – TBD; Strategic Planning
April 5	Public Budget Hearing; Regular BOE Meeting
April 26	Special BOE Meeting – TBD; Strategic Planning
May 3 – **5:30 pm**	Annual District Meeting (open referendum)
May 10	Regular BOE Meeting

May 24	Special BOE Meeting – Possible Annul Retreat, Strategic Planning
June 7	Regular BOE Meeting
June 21	Special BOE Meeting – Superintendent Annual Review

*These meetings were approved at the Board's November 10, 2025 Regular Meeting.

Agendas:

Regular Meeting:
Committee & Liaison Reports
Facilities
Finance
Special Education
Policy
Personnel

Special Meeting:
Student Report
3 A's & POG Presentation
Superintendent Report
Curriculum & Instruction
Special Topic(s)
Strategic Planning Sessions

Committees

Committee meetings are held in different locations – please check invitations from Lisa Zeleski

AFC – 5:30 pm start unless otherwise noted – Lecture Hall

8/17/26
9/14/26
10/5/26
11/9/26
11/23/26 – 6:00 pm (Special BOE Meeting Department Budget Presentations)
12/14/26
1/11/27
1/25/27^ - 6:00 pm
2/8/27
2/22/27^ - 6:00 pm (vote to recommend budget to BOE)
3/8/27
4/5/27 – 5:30 pm meeting, Public Budget Hearing begins at 6:30 pm
5/10/27
6/7/27

^Joint Budget workshops with Board of Education

Curriculum – 4:30 pm start time – Zoom and in-person – Presentation Room

9/30/26
10/21/26
12/9/26
2/10/27
3/17/27
4/28/27

Policy – 5:30 pm start time unless otherwise noted – Lecture Hall

9/28/26
10/19/26
11/23/26
12/21/26
1/25/27 (5:00 start)
2/22/27 (5:00 start)
3/22/27
4/26/27
5/24/27 - tentative
6/21/27

Communications – 5:30 pm start time – Zoom

8/18/26
9/TBD/26
12/15/26
2/9/27
4/6/27
6/8/27

Personnel – TBD – Presentation Room/District Office

August/September meeting to approve Administrator Assistants' Contract
October – December – Teacher Negotiations – 4-6 evenings
December/January meeting to approve Teachers' Contract
May meeting to approve non-union recommendations
May/June meeting to approve Nurses' Contract and Paraeducators' Contract

Facilities – 5:30 pm start time unless otherwise noted – Presentation Room

8/11/26	1/12/27
9/8/26	2/9/27
10/13/26	3/9/27
11/10/26	4/13/27
12/8/26	5/11/27
	6/8/27

Ad Hoc School Start Time – 4:00 pm start time – Zoom

Reconvene January 2027

1/19/27	4/27/27
2/23/27	5/25/27
3/23/27	

District Health, Safety and Wellness Committee – 1:30-2:30 pm – Presentation Room

10/28/26
12/9/26
3/25/27
6/2/27

District Technology Committee – 2:45-4:00 pm – Presentation Room

10/20/26
1/26/27
4/27/27

July Ticket Summary

Tickets addressed and closed: N/A

Tickets open: 0

HS Student Help Desk

Students helped: N/A

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:

- Upgrade and replacement of Middle School Bell/Paging and Emergency Notification system complete in both Orange and Bethany.
- Student devices for 2026-2027 School Year are imaged and ready for deployment on the first day of school
- Promethean boards have been installed in all three buildings
  - Science and World Language in the HS
  - English and World Language in both MS
- Additional security cameras have been installed in all three buildings
  - Fire road and Automotive shop at the HS
  - Side parking lots at both MS

Projects in process:

- Website refresh and website content management system update is in progress
- Security Awareness Training for staff has been paused during summer
  - Monthly short training videos
  - Monthly phishing simulations
- Server replacements in both Middle Schools and the High School has been started but equipment delays will push completion to late September
- Technology help desk has been temporarily moved to the second floor during LMC construction
- High School Bell/Paging Emergency Notification system upgrades to be completed September

August 2026

CLEAN

SAFE

HEALTHY

SCHOOLS

FMX Report

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 lockdown/PA upgrade at both Middle schools was completed and tested at the end of July.
- The Fire Pump replacement was completed at AMSB.
- Improvements to the front entrance at AMSB were completed by an outside vendor.
- New bollards were installed by an outside vendor at AMSB to address security concerns.
- The remaining power washing of the exterior of the building was completed by an outside contractor.

Projects in process:

- The media center renovation at ARHS is underway. The project kicked off on July 14th. To date, all the demo work has been completed. New walls are going up; the new floor tile outside the media center is scheduled to be installed the week of August 17th; new electrical work is being done; door frames are also scheduled to be installed the week of the 17th.
- The bell and paging system upgrades for ARHS are underway.
- The District is working with the town of Bethany to secure a permit for the storage building for AMSB. Approval from QVHD was granted.
- A leaking fitting on the main HVAC loop at AMSO is being repaired by an outside vendor. There is a long lead time on the part.
- A new filtration system for the glycol loop at AMSO has been ordered; we are working with F&F Mechanical on installation when it arrives, as well as flushing and cleaning the loop.
- Repairs to a water line in the parking lot at ARHS are scheduled.
- Repairs to the domestic water well pump vault at AMSB are being wrapped up. As of July 1 to date, all new electrical components have been replaced, including sump pump controllers, control panels, VFDs, and pump motors. Temporary water supply was restored on July 14th. As of August 13th, permanent water supply has been restored to the building. We will continue to flush the system for the next week.

Outstanding issues to be addressed:

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.

2027-2028 BUDGET CALENDAR

August

- **AUGUST 17, 2026:** At the Amity Finance Committee and Board of Education Meetings:
  - ✓ Director of Finance and Administration presents the fiscal year-end financial report.
  - ✓ Superintendent discusses appropriation to Educational Reserve from the 2025-2026 fund balance.
  - ✓ Superintendent presents the preliminary budget calendar.

September

- **SEPTEMBER 7, 2026:**
  - ✓ Amity Finance Committee and the Board of Education vote on appropriating up to 2% of prior year fund balance. The Amity Board of Education is encouraged to attend.
- **SEPTEMBER 2026:** At meeting of Administrators:
  - ✓ Superintendent presents the budget priorities.
  - ✓ The budget calendar is distributed and discussed.
  - ✓ The budget process, instructions, and forms are distributed and discussed.
  - ✓ MUNIS budget reports with historical data are distributed.
- **T.B.D.:** Administrators meet with staff to distribute and explain Board Goals, Superintendent's budget priorities, budget calendar, Budget Handbook, process for entering budgets on-line, and MUNIS reports with historical data.
- **T.B.D.:** Assistant Director of Finance and Administration will set-up and conduct training on procedures for entering budget data on-line for Administrators and staff who work on the budget.

October

- **OCTOBER 1, 2026 A.D.M.** Average Daily Membership (ADM) as of October 1 is calculated according to statutory guidelines. The ADM is used to allocate each town's share of the subsequent year's budget.
- **OCTOBER 23, 2026:** Administrators and/or staff will complete entering their budget requests at the Unit Level (e.g., Department).
- **OCTOBER 23, 2026:** Administrators submit their technology requests to the Director of Technology, facilities requests to Director of Facilities, and textbooks to the Director of Curriculum.
- **OCTOBER 30, 2026:**
  - o Director of Facilities submits preliminary Facilities Five-Year Capital Improvement Plan to the Director of Finance and Administration.
  - o Director of Technology submits preliminary Technology Five-Year Capital Improvement Plan to the Director of Finance and Administration.

- Assistant Director of Finance and Administration completes 2027-2028 Budget Salary Schedule. New personnel requests will be included. A separate schedule will be prepared with all the new personnel requests, recommended deletions, and changes to personnel positions.
- Director of Finance and Administration completes 2027-2028 Budgets for benefits and other District accounts.
- Assistant Director of Finance and Administration completes entering salary (including new personnel requests, recommended deletions, and changes), benefits, and other District accounts into the MUNIS system.
- Administrators complete approval of budget requests entered on-line in the MUNIS system.
- Administrators complete online forms and data entry, as described in the Budget Handbook, to the Director of Finance and Administration.

<u>November</u>

- **NOVEMBER 9, 2026:** Director of Finance and Administration and Assistant Director of Finance and Administration provide the Superintendent with budget reports, list of new personnel requests and assumptions and observations.
- **T.B.D (NOVEMBER 2026):** The Technology Committee reviews and discusses the preliminary Technology Five-Year Capital Improvement Plan.
- **NOVEMBER 2026:** The Superintendent discusses the initial budget with Administrators.
- **NOVEMBER 18, 2026:** The Director of Finance and Administration facilitates a discussion of the budget with the Administrative Team to recommend possible changes to the Superintendent.
- **NOVEMBER 20, 2026:** Assistant Director of Finance and Administration makes changes directed by Superintendent and distributes updated MUNIS budget reports and revised list of new personnel requests to Superintendent.
- **NOVEMBER 21, 2026:**
  - Administrators review MUNIS budget reports for their areas of responsibility and 'sign-off' on numbers, or provide revisions, with an e-mail to the Assistant Director of Finance and Administration.
  - Assistant Director of Finance and Administration makes changes due to errors or omissions identified by Administrators.
  - Assistant Director of Finance and Administration distributes updated MUNIS budget reports and revised list of new personnel requests to Superintendent.
- **November 23, 2026 – Assistant Superintendent for Curriculum and Staff Development, Directors of Athletics, Facilities, Technology, Pupil Services, and School Principals make budget presentations to the Amity Finance Committee and the Amity Board of Education at a special Board Meeting.**

<u>December</u>

- **DECEMBER 1, 2026:** Director of Technology submits updated enrollment data to New England School Development Council (NESDEC) for the purpose of obtaining revised enrollment projections.
- **DECEMBER 2026:** Superintendent meets with Administrators to discuss budget and make decisions on further changes, if necessary.
- **DECEMBER 1, 2026:**
  - Assistant Director of Finance and Administration makes changes directed by Superintendent and distributes updated MUNIS budget reports and revised list of new personnel requests to Superintendent.
  - Administrators print out MUNIS budget report(s) for their area(s) of responsibility and review for errors or omissions. Administrators 'sign-off' on their budget or provide revisions by sending an e-mail to the Superintendent, Director of Finance and Administration, and Assistant Director of Finance and Administration.
  - Assistant Director of Finance and Administration makes changes due to errors or omissions identified by Administrators, subject to the approval of the Superintendent.
  - Assistant Director of Finance and Administration distributes updated MUNIS budget reports and revised list of new personnel requests to Superintendent.
  - Director of Finance and Administration and Assistant Director of Finance and Administration prepare budget report for Superintendent.
- **DECEMBER 2, 2026:** The Facilities Committee reviews and discusses the preliminary Facilities Five-Year Capital Improvement Plan.
- **DECEMBER 8, 2026:** At the Amity Finance Committee and Amity Board of Education meetings, Superintendent presents preliminary budget information, including, major budget drivers, Federal and State unfunded and underfunded mandates and related costs, and potential budget balancers.

<u>January</u>

- **JANUARY 5, 2027:** Director of Finance and Administration and Assistant Director of Finance and Administration submit preliminary budget documents to Superintendent for review.
- **JANUARY 8, 2027:** Superintendent meets with Administrators to review and discuss the proposed 2027-2028 Budget.
- **JANUARY 8, 2027:** Superintendent distributes the proposed 2027-2028 Budget to the Amity Board of Education, Amity Finance Committee, First Selectmen, and Boards of Finance.
- **JANUARY 11, 2027:** Superintendent presents the proposed 2027-2028 Budget to the Amity Finance Committee.
- **JANUARY 2027:** The Curriculum Committee reviews and discusses the 5 Year Textbook Forecast Plan, new programs and enhancements, and staffing.

- **JANUARY 25, 2027:** Amity Finance Committee and/or Amity Board of Education may meet to consider revisions to the Superintendent's proposed 2027-2028 budget. Additional workshops will be held, if necessary.
- **JANUARY - FEBRUARY 2027 T.B.D:** Superintendent meets with each of the Member Towns Boards of Finance to have an open dialog on the 2027-2028 budget.

February

- **FEBRUARY 8, 2027:** Superintendent presents the proposed 2027-2028 Budget, as amended by the Amity Finance Committee, to the Amity Board of Education. The Amity Board of Education will begin deliberation of the proposed 2027-2028 budget.
- **T.B.D.:** The Amity Board of Education will set as many budget workshops as they deem appropriate.
- **FEBRUARY 15, 2027:** Superintendent distributes the revised 2027-2028 budget to the Amity Board of Education, Amity Finance Committee, First Selectmen, and Boards of Finance. The revisions will be based on the feedback from the Amity Board of Education.
- **FEBRUARY 22, 2027 -AFC/BOE Joint Budget Workshop. AFC votes on budget recommendation.**

March

- ***By* MARCH 1, 2027:** Amity Finance Committee meets to discuss the Superintendent's Proposed 2027-2028 Budget, make any desired changes, and vote to send the proposed 2027-2028 budget to the Amity Board of Education for their consideration. (if necessary)
- **MARCH 8, 2027:**
    - Amity Finance Committee will consider if the budget vote should be at the Annual Public Budget Meeting or by Referendum on the next day. A recommendation will be made to the Amity Board of Education.
    - Amity Board of Education meets to discuss the proposed 2027-2028 budget, make any desired changes, and vote to send the proposed 2027-2028 budget to the Public.
    - Amity Board of Education will decide if the budget vote should take place at the Annual Public Budget Meeting or by Referendum on the next day.

April

- **APRIL 6, 2027:**
    - Public District Budget Hearing is held.
    - Amity Finance Committee and Amity Board of Education vote on the budget to send to the Public for a vote.

May

- **MAY 4, 2027 (MONDAY):** Annual District Meeting is held.
- **MAY 5, 2027 (TUESDAY):** Referendum is held unless vote takes place at Annual Public Budget Meeting.

Note: The Amity Board of Education will decide if the budget vote should take place at the Annual Public Budget Meeting or by Referendum on the next day.

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

Theresa Lumas ***Phone (203) 397-4813***
Director of Finance and Administration ***Fax (203) 397-4864***
terry.lumas@amityregion5.org

To: Jennifer Byars, Superintendent of Schools

From: Theresa Lumas, Director of Finance and Administration

Re: Reserve Funds for Capital and Nonrecurring and Educational Expenses

Date: August 3, 2026

Public Act 25-93 requires the board to include the balance of any non-lapsing account in the annual report of the board of education that is required under Connecticut General Statutes §§ 10-222 and 10-224.

Section 37 of Public Act 25-93 requires, beginning in fiscal year 2026, regional boards of education that have created a reserve fund to (1) make available and annually update information regarding the fund, including, but not limited to, the total balance of the fund, the amount deposited into the fund in a fiscal year, and an accounting of the expenditures made from the fund. A regional board of education must also, not later than thirty days from the adoption of the board's budget, notify the exclusive bargaining representative for certified employees of (i) the establishment of the reserve fund for educational expenditures, or (ii) the board's intended uses for any funds in such fund during the next fiscal year.

Enclosure

CAPITAL AND NONRECURRING RESERVE

Net Balance as of June 30, 2025	**$ 2,008,816.20**
Plus:	
STIF Interest Earned	**$ 59,246.68**
Subtotal	**$ 2,068,062.88**
Less: 2025-2026 Expenditures & Encumbrances:	
Contingency Bond Payment	$ (8,553.78)
ARHS Auditorium Lighting Controls	$ (56,460.27)
ARHS Library Media Center (LMC)	$ (43,195.30)
Subtotal	**$ (108,209.35)**
Net Balance as of June 30, 2026	**$ 1,959,853.53**
Net Balance by Project:	
Bond Contigency	$ -
Roof Restoration - ARHS	$ 690.32
Lighting Project	$ 1,243.73
AHS All Weather Field	$ 120,192.60
LMC Renovations	$ 1,778,480.20
Undesignated - Interest Earned FY26	$ 59,246.68
Bond Premium designated for Debt Service	
Captial Reserve Transfer from Budget	
	$ 1,959,853.53

Educational Expenses Reserve Fund FY26

Net Balance as of June 30, 2025	**$ 1,091,550.22**
Plus:	
Plus: 2024-2025 Appropriations	**$ 1,129,132.00**
Earned Interest	**53,704.96**
Subtotal	**$ 2,274,387.18**
Less: 2025-2026 Expenditures & Encumbrances:	
MS Library Media Center (LMC)	$ (29,000.00)
ARHS Library Media Center (LMC)	$ (2,327.50)
Infrastructure - Technology	$ (100,000.00)
AMSB Fire Pump	$ (11,000.00)
Subtotal	**$ (142,327.50)**
Net Balance as of June 30, 2026	**$ 2,132,059.68**
Net Balance by Project:	
LMC Renovations	$ 1,738,858.50
Infrastructure - Technology	$ 100,000.00
AMSB Fire Pump	$ 239,000.00
Undesignated - Interest Earned FY25	$ 496.22
Undesignated - Interest Earned FY26	$ 53,704.96
	$ 2,132,059.68

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

To: Jennifer P. Byars, Superintendent of Schools

From: Theresa Lumas, Director of Finance & Administration

Date: August 3, 2026

Re: Request to Appropriate funds to the Educational Expenditure Account

The Administration proposes that 2% of the remaining operating 2025-2026 budget be appropriated to the Educational Expenditure Account.

I am recommending the Amity Finance Committee and Board of Education approve the following appropriation and budget transfer of 2% or **$1,162,179** into Reserve Fund for Educational Expenditures from the fiscal year 2025-2026. The state statute does not require designation at the time of appropriation; however Board policy does require designation at the time of transfer.

I am also recommending the Board designate the investment revenue earned in the last two fiscal years. There is $59,246.68 in CNR and $54,697.40 in Educational Expense Reserve, for a total of $113,944.08.

The total amount the Board needs to designate is $1,162,179 (2%) + $113,944.08 (Investment Income) = $1,276,123.08.

ITEM	**AMOUNT**	**RATIONALE**
Infrastructure Replacement	$ 200,000.00	The long-term capital plan has $250,000 budget each year, however only $50,000 was approved in the current budget
Library Media Center Projects	$1,076,123.08	Both middle schools are scheduled for LMC renovations when the high school is complete.

Setting aside the technology funds will allow for continued support to address critical infrastructure equipment. Servers are being replaced from the first allocation last year. Switches would be next and will require significant funding over multiple fiscal years. Switches cannot be replaced on a rolling basis; they are functional only when replaced simultaneously.

The projected costs for high school library media project may be higher than anticipated. The construction cost bid price was approximately $245,000 over the application estimate. The furniture and equipment portion of the project is being reviewed in preparation for our next meeting with Department of Administrative Services (DAS). The furniture is being priced from multiple sources and reviewed item by item. A few changes have been made to reduce the costs but the administration's intent is to keep the plan as close to the original proposal as possible while avoiding utilizing the project's contingency account so early in the timeline. Setting aside the majority of the unspent funds towards the library projects will address the higher costs in the high school as well as reduce and/or avoid the borrowing costs for the middle school library media center projects.

The remaining funds from the fiscal year, once audited, $580,748.08 will be credited to the member towns' March 2027 allocation payment. This includes prior year FY25 unexpended encumbrances of $142,564.30, additional revenue in FY26 of 202,996.82 and the remaining unspent funds after proposed transfer of $235,186.96.

The Amity Facilities Committee approved both motions below:

Amity Finance Committee:
Move to recommend the Amity Board of Education approve…

Amity Board of Education Committee:
Move to approve…

… an appropriation and budget transfer of $1,162,179 from the General Fund into Reserve Fund for Educational Expenditures from the fiscal year 2025-2026 year-end funds.

ACCOUNT NUMBER	**ACCOUNT NAME**	**FROM**	**TO**
XX-XX-XXXX	Various general fund expenses accounts	$1,162,179	
05-15-0000-5856	Transfer Account		$1,162,179

Amity Finance Committee:
Move to recommend the Amity Board of Education approve…

Amity Board of Education Committee:
Move to approve…

… the designation of funds for technology infrastructure and the Library Media Center Renovation projects from the remaining 2% appropriation and investment income.

ACCOUNT NUMBER	ACCOUNT NAME	FROM	TO
00-15-0099-5856	Transfer Account	$1,162,179.00	
17-00-15-0099-5899	Undesignated - CNR	$59,246.68	
21-00-15-0199-5899	Undesignated – Ed Exp	$54,697.40	
00-15-0104-5715	Technology Infrastructure		$200,000.00
00-15-0065-5715	CNR – LMC- AHS		$59,246.68
00-15-0100-5715	Ed. Reserve – LMC-all schools		$1,016,876.40

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: Action Items Relating to the ARHS Library Media Center Renovation

Date: August 13, 2026

Silver Petrucelli and Associates (SP&A), the architects on the library media center (LMC) project at the high school have been reviewing plans for the LMC fixtures, furniture and equipment (FF&E) with the District personnel. The construction bid came in $245,155 over budget and we are now preparing to procure the furniture. The furniture costs have also risen since the project started. The Administration has been working with SP&A to review the proposed furniture, possible alternates, and additional funding. There is a contingency account but since it is very early in the construction stage, it is premature to expend those funds.

The original FF&E budget was $615,500 and with current estimates it is $667,618 or $52,188 over. Combined overages with construction and FF&E are $297,273 ($245,155+$52,188).

Four furniture budget options were presented to the Facilities Committee on August 11, 2026. The options address the shortfall ranging from as "originally designed" which increases the budget $297,273, down to identifying potential alternate furniture and shelving at $173,013.

In further consultation with the architects from Silver Petrucelli, their recommendation is that the District request a budget increase from DAS for an additional $300,000. That is the closer to option 1 on the attached budget sheet. The District could receive approximately 42.86% reimbursement if approved by DAS. The Administration recommends the Board increase the furniture budget by $300,000 for DAS purposes, noting that the Administration will bring final costs to the Board for their approval if actual increases are over $200,000.

The project was originally estimated at $3,152,596 before State reimbursement.

If the changes are approved, the total project costs may increase to $3,452,596. This total may be subject to the State reimbursement rate of 42.86%, but that is not confirmed with

DAS. We are scheduling a meeting with DAS as soon as possible. DAS will seek confirmation the additional funding is secured.

The additional amount the Board contributes may have a potential State reimbursement of $128,580.   There are funds requested for the library media projects in the 2% appropriation memo in this packet. If the Board approved the 2% appropriation, and supports increasing the high school project, it must now specify that the high school library budget would be increased using that appropriation.

The Amity Facilities Committee took action to recommend the Amity Board of Education approve a revised cost estimate that minimizes the increase using proposed alternate shelving and domestically sourced furniture whenever possible.

The Board will need to authorize the revised cost of the project in order to proceed pursuing additional funds with DAS-School Construction.

Motion:

For the Amity Finance Committee:

Recommend the Amity Board of Education …

For the Amity Board of Education:

The Amity Board of Education…

…. approves a budget increase up to $300,000 for the revised cost estimate for FF&E, at a total budget of $3,452,596 for the ARHS library media center renovation project inclusive of adjoining classrooms, and offices. These funds are available immediately in the 2% appropriation from the FY26 end-of-year funds.

AMITY HIGH SCHOOL LIBRARY MEDIA CENTER ALTERATIONS

8/11/2026

ARCHITECTS ENGINEERS INTERIORS

Construction Budget:	$	2,230,845	FF&E Budget:	$	615,500	**Total Funding Shortfall**	
Actual Const. Cost:	$	2,476,000	Updated Budget:	$	667,618		
Construction Shortfall:	$	(245,155)	FF&E Shortfall:	$	(52,118)	$	(297,273)

Option 1: Provide FF&E Package as Designed and Fund Entire Shortfall						**Total Funding Request**	
Construction Budget:	$	2,230,845	FF&E Budget:	$	615,500		
Actual Const. Cost:	$	2,476,000	Updated Budget:	$	667,618		
Construction Shortfall:	$	(245,155)	FF&E Surplus:	$	(52,118)	$	(297,273)
Option 2: Remove Furniture Items Identified as potential alternates *(See plan for alternate items)*							
Construction Budget:	$	2,230,845	FF&E Budget:	$	615,500		
Actual Const. Cost:	$	2,476,000	Updated Budget:	$	610,295		
Construction Shortfall:	$	(245,155)	FF&E Surplus:	$	5,205	$	(239,950)
Option 3: Remove Furniture Items Identified as potential alternates *(See plan for alternate items)* plus manufacturer substitution for library shelving							
Construction Budget:	$	2,230,845	FF&E Budget:	$	615,500		
Actual Const. Cost:	$	2,476,000	Updated Budget:	$	543,358		
Construction Shortfall:	$	(245,155)	FF&E Surplus:	$	72,142	$	(173,013)
Option 4: Manufacturer substitution for library shelving - NO ALTERNATES							
Construction Budget:	$	2,230,845	FF&E Budget:	$	615,500		
Actual Const. Cost:	$	2,476,000	Updated Budget:	$	568,303		
Construction Shortfall:	$	(245,155)	FF&E Surplus:	$	47,197	$	(197,958)

*Or partially fund with contingency dollars at end of project - MAX. $154,920

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

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2024-2025	2025-2026	MAY 26	CHANGE	EOY 26	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
1	MEMBER TOWN ALLOCATIONS	55,272,025	56,835,803	56,835,803	0	56,835,803	0	FAV
2	OTHER REVENUE	323,394	221,597	298,411	15,993	314,404	92,807	FAV
3	OTHER STATE GRANTS	991,294	1,036,599	1,161,579	(22,191)	1,139,388	102,789	FAV
4	MISCELLANEOUS INCOME	20,139	15,000	21,000	1,400	22,400	7,400	FAV
5	**TOTAL REVENUES**	**56,606,852**	**58,108,999**	**58,316,793**	**(4,798)**	**58,311,995**	**202,996**	**FAV**
6	SALARIES	30,600,178	32,683,157	32,112,390	(163,821)	31,948,569	(734,588)	FAV
7	BENEFITS	6,740,038	7,156,139	7,023,267	(406,289)	6,616,978	(539,161)	FAV
8	PURCHASED SERVICES	9,450,226	10,909,628	10,858,847	(249,666)	10,609,181	(300,447)	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	3,863,466	(167,827)	3,695,639	140,641	UNF
11	EQUIPMENT	245,196	274,400	330,975	46,795	377,770	103,370	UNF
12	IMPROVEMENTS / CONTINGENCY	137,685	749,000	943,694	(222,184)	721,511	(27,490)	FAV
13	DUES AND FEES	214,307	229,381	191,381	(1,693)	189,688	(39,693)	FAV
14	TRANSFER ACCOUNT	1,129,132	0	0	1,162,179	1,162,179	1,162,179	UNF
15	**TOTAL EXPENDITURES**	**55,792,102**	**58,108,999**	**57,876,316**	**(2,504)**	**57,873,812**	**(235,187)**	**FAV**
16	**SUBTOTAL**	**814,752**	**0**	**440,477**	**(7,302)**	**438,184**	**438,184**	**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**	**440,477**	**(7,302)**	**438,184**	**438,184**	**FAV**

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

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

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2024-2025	2025-2026	MAY 26	CHANGE	EOY 26	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	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	
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	
3	WOODBRIDGE 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	
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	(553)	26,448	(553)	UNF
6	INVESTMENT INCOME	138,452	60,000	110,000	16,277	126,277	66,277	FAV
7	PARKING INCOME	30,967	32,000	30,000	319	30,319	(1,681)	UNF
8	RENTAL INCOME	17,181	18,000	13,815	(50)	13,765	(4,235)	UNF
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**	**298,411**	**15,993**	**314,404**	**92,807**	**FAV**
12	ADULT EDUCATION	5,178	4,900	4,427	557	4,984	84	FAV
13	OPEN CHOICE	0	125,000	187,608	0	187,608	62,608	FAV
14	SPECIAL EDUCATION GRANTS	964,016	884,599	952,644	(22,748)	929,896	45,297	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**	**1,161,579**	**(22,191)**	**1,139,388**	**102,789**	**FAV**
17	INTERGOVERNMENTAL REVENUE	0	0	0	0	0	0	FAV
18	OTHER REVENUE	20,139	15,000	21,000	1,400	22,400	7,400	FAV
19	TRANSFER IN	0	0	0	0	0	0	FAV
20	**MISCELLANEOUS INCOME**	**20,139**	**15,000**	**21,000**	**1,400**	**22,400**	**7,400**	**FAV**
21	**TOTAL REVENUES**	**56,606,852**	**58,108,999**	**58,316,793**	**(4,798)**	**58,311,995**	**202,996**	**FAV**

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

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

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2024-2025	2025-2026	MAY 26	CHANGE	EOY 26	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
1	5111-CERTIFIED SALARIES	25,246,947	26,913,147	26,486,128	(67,494)	26,418,634	(494,513)	FAV
2	5112-CLASSIFIED SALARIES	5,353,231	5,770,010	5,626,262	(96,327)	5,529,935	(240,075)	FAV
3	**SALARIES**	**30,600,178**	**32,683,157**	**32,112,390**	**(163,821)**	**31,948,569**	**(734,588)**	**FAV**
4	5200-MEDICARE - ER	428,639	474,989	464,989	(20,285)	444,704	(30,285)	FAV
5	5210-FICA - ER	343,760	378,210	360,210	5,787	365,997	(12,213)	FAV
6	5220-WORKERS' COMPENSATION	158,586	169,575	150,203	(3,103)	147,100	(22,475)	FAV
7	5255-MEDICAL & DENTAL INSURANCE	4,548,772	4,837,753	4,747,753	(413,679)	4,334,074	(503,679)	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	(5,956)	50,505	(5,956)	FAV
10	5275-DISABILITY INSURANCE	11,372	15,016	15,016	(1,923)	13,093	(1,923)	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	198,171	38,728	236,899	53,728	UNF
13	5282-RETIREMENT SICK LEAVE - CERT	0	0	0	0	0	0	FAV
14	5283-RETIREMENT SICK LEAVE - CLASS	0	0	0	0	0	0	FAV
15	5284-SEVERANCE PAY - CERTIFIED	0	0	0	0	0	0	FAV
16	5290-UNEMPLOYMENT COMPENSATION	17,352	15,500	10,000	(3,040)	6,960	(8,540)	FAV
17	5291-CLOTHING ALLOWANCE	1,912	4,600	4,600	(2,525)	2,075	(2,525)	FAV
18	5292-TUITION REIMBURSEMENT	4,554	27,000	22,000	(293)	21,707	(5,293)	FAV
19	**BENEFITS**	**6,740,038**	**7,156,139**	**7,023,267**	**(406,289)**	**6,616,978**	**(539,161)**	**FAV**
20	5322-INSTRUCTIONAL PROG IMPROVEMENT	81,812	64,200	64,200	(34,458)	29,742	(34,458)	FAV
21	5327-DATA PROCESSING	130,705	157,949	152,249	34,186	186,435	28,486	UNF
22	5330-PROFESSIONAL & TECHNICAL SRVC	2,247,009	2,602,472	2,740,261	85,701	2,825,962	223,490	UNF
23	5440-RENTALS - LAND, BLDG, EQUIPMENT	104,661	123,327	120,827	(7,303)	113,524	(9,803)	FAV
24	5510-PUPIL TRANSPORTATION	3,727,958	4,184,788	4,348,904	(227,298)	4,121,606	(63,182)	FAV
25	5521-GENERAL LIABILITY INSURANCE	301,337	324,428	319,815	(21,546)	298,269	(26,159)	FAV
26	5550-COMMUNICATIONS: TEL, POST, ETC.	91,860	133,134	133,134	(19,050)	114,084	(19,050)	FAV
27	5560-TUITION EXPENSE	2,694,569	3,198,805	2,873,932	(59,514)	2,814,418	(384,387)	FAV
28	5590-OTHER PURCHASED SERVICES	70,316	120,525	105,525	(384)	105,141	(15,384)	FAV
29	**PURCHASED SERVICES**	**9,450,226**	**10,909,628**	**10,858,847**	**(249,666)**	**10,609,181**	**(300,447)**	**FAV**

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

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

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2024-2025	2025-2026	MAY 26	CHANGE	EOY 26	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
30	5830-INTEREST	368,978	235,850	235,850	0	235,850	0	FAV
31	5910-REDEMPTION OF PRINCIPAL	3,489,233	2,316,446	2,316,446	0	2,316,446	0	FAV
32	**DEBT SERVICE**	**3,858,211**	**2,552,296**	**2,552,296**	**0**	**2,552,296**	**0**	**FAV**
33	5410-UTILITIES, EXCLUDING HEAT	936,901	718,420	1,032,723	(43,841)	988,882	270,462	UNF
34	5420-REPAIRS, MAINTENANCE & CLEANING	798,707	857,352	860,882	(9,709)	851,173	(6,179)	FAV
35	5611-INSTRUCTIONAL SUPPLIES	322,271	436,097	384,061	7,359	391,420	(44,677)	FAV
36	5613-MAINTENANCE/CUSTODIAL SUPPLIES	178,557	220,450	220,450	(17,386)	203,064	(17,386)	FAV
37	5620-OIL USED FOR HEATING	67,017	55,260	56,931	5,466	62,397	7,137	UNF
38	5621-NATURAL GAS	77,407	99,100	185,100	(11,346)	173,754	74,654	UNF
39	5627-TRANSPORTATION SUPPLIES	171,394	209,500	204,500	(53,775)	150,725	(58,775)	FAV
40	5641-TEXTS & DIGITAL RESOURCES	156,903	173,164	158,164	(18,989)	139,175	(33,989)	FAV
41	5642-LIBRARY BOOKS & PERIODICALS	18,632	20,550	20,550	(1,407)	19,143	(1,407)	FAV
42	5690-OTHER SUPPLIES	246,191	269,241	244,241	11,807	256,048	(13,193)	FAV
43	5695-OTHER SUPPLIES-TECHNOLOGY	443,149	495,864	495,864	(36,005)	459,859	(36,005)	FAV
44	**SUPPLIES (INCLUDING UTILITIES)**	**3,417,128**	**3,554,998**	**3,863,466**	**(167,827)**	**3,695,639**	**140,641**	**UNF**
45	5730-EQUIPMENT - NEW	8,199	4,500	10,040	7,956	17,996	13,496	UNF
46	5731-EQUIPMENT - REPLACEMENT	66,263	105,617	156,652	(13,119)	143,533	37,916	UNF
47	5732-EQUIPMENT - TECH - NEW	600	26,580	26,580	(6,098)	20,482	(6,098)	FAV
48	5733-EQUIPMENT - TECH - REPLACEMENT	170,134	137,703	137,703	58,056	195,759	58,056	UNF
49	**EQUIPMENT**	**245,196**	**274,400**	**330,975**	**46,795**	**377,770**	**103,370**	**UNF**
50	5715-IMPROVEMENTS TO BUILDING	67,309	326,000	516,186	51,674	567,860	241,860	UNF
51	5715-FACILITIES CONTINGENCY	100,000	100,000	48,831	(148,831)	(100,000)	(100,000)	FAV
51a	TRSF. FROM FACILITIES CONTINGENCY	-100,000	0	51,169	48,831	100,000	0	FAV
52	5720-IMPROVEMENTS TO SITES	70,376	173,000	177,508	(23,858)	153,650	(19,350)	FAV
53	5850-DISTRICT CONTINGENCY	74,500	150,000	130,001	(280,001)	(150,000)	(150,000)	FAV
53a	TRSF. FROM CONTINGENCY TO OTHER ACCTS.	-74,500	0	19,999	130,001	150,000	0	FAV
54	**IMPROVEMENTS / CONTINGENCY**	**137,685**	**749,000**	**943,694**	**(222,184)**	**721,511**	**(27,490)**	**FAV**

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

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

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2024-2025	2025-2026	MAY 26	CHANGE	EOY 26	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
55	5580-STAFF TRAVEL	28,311	27,377	12,377	9,013	21,390	(5,987)	FAV
56	5581-TRAVEL - CONFERENCES	83,228	85,718	67,718	(2,430)	65,288	(20,430)	FAV
57	5810-DUES & FEES	102,769	116,286	111,286	(8,277)	103,009	(13,277)	FAV
58	**DUES AND FEES**	**214,307**	**229,381**	**191,381**	**(1,693)**	**189,688**	**(39,693)**	**FAV**
59	**5856-TRANSFER ACCOUNT**	1,129,132	**0**	**0**	**1,162,179**	**1,162,179**	**1,162,179**	**UNF**
60	**TOTAL EXPENDITURES**	**55,792,102**	**58,108,999**	**57,876,316**	**(2,504)**	**57,873,812**	**(235,187)**	**FAV**
61 **Note:**	**RESTRICTED - RETURN TO TOWNS**	**898,605**						

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

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

EOY 2026

2025-2026 FORECAST

OVERVIEW

The projected unspent fund balance for this fiscal year is $438,184 FAV, previously $398,147 FAV, which appears on page 1, column 6, and line 19. The unspent funds of $580,747 once audited will be deducted from the town allocations in March 2027. This is comprised of $235,187 of FY26 unspent funds, $202,996 in additional revenue, and $142,564 in FY25 unspent encumbrances. The Board may approve 2% of the unspent funds as an end-of-year transfer. The appropriation request to the educational expenditure account is shown on line 59 of the Excel file 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 appropriation is requested this month.

REVENUES BY CATEGORY

The projected balance of revenues is ***$202,996 FAV***, previously $217,794 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. ***Actual is $553 UNF, previously neutral***.

LINE 6 on Page 2: INVESTMENT INCOME:
The forecast is based on historical data of State payments. ***Actual is $66,277 FAV, previously $60,000 FAV***.

Month	M&T Bank	State Treasurer's Investment Fund
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%
Mar 2026	.40%	3.71%
Apr 2026	.40%	3.72%
May 2026	.40%	3.70%
June 2026	.40%	3.79%

LINE 7 on Page 2: PARKING INCOME:
The forecast is based on historical data of State payments. ***Actual is $1,681 UNF, previously $2,000 UNF***.

LINE 8 on Page 2: RENTAL INCOME:
The forecast is based on historical data of State payments. ***Actual is $4,235 UNF, previously $4,185 UNF***.

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. ***Actual 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. ***Actual is $84 UNF, previously $473 UNF***.

LINE 13 on Page 2: OPEN CHOICE:
The forecast is based on historical data of State payments. ***Actual is $62,608 FAV, previously $62,608 FAV. This is based on October 1 enrollment data and actual 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. The budget is based on a 60% reimbursement rate. The first payment received is at 67.91% rate. **The final reimbursement rate was 62.92%. The actual revenue is $45,033 FAV plus $264 of a minor health & welfare grant.**

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. ***Actual 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. ***Actual is $7,400 FAV, previously $6,000 FAV***.

EXPENDITURES BY CATEGORY

The projected yearend balance of expenditures is ***$235,187 FAV, previously $180,353 FAV*** which appears on page 5, column 6, line 60.

LINE 1 on Page 3: 5111-CERTIFIED SALARIES:
The report is based on actual data. There is a vacant position all year. The vacancy is supported by contracting with an outside agency. There were several staff members on unpaid leaves of absences year-to-date, ***$66,338 FAV; mid-year staff resignations which***

were not filled immediately and vacant positions for the remainder of the year, $161,605 FAV, previously $146,668, 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. Coverage and substitutes usage was less than budgeted $112,677 previously, $82,686 FAV. Extracurricular and coaching stipends were $35,257 FAV. Actual is $494,513 FAV, previously $427,019 FAV. There was a transfer approved in June for curriculum writing in this month's packet, $10,638 UNF between salary accounts.

LINE 2 on Page 3: 5112-CLASSIFIED SALARIES:
Actual is $240,075 FAV, previously $143,748 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 in all positions, resulting in savings of $178,673 FAV. Actual spend is $50,322 less FAV, previously forecasted $15,000 FAV for substitutes.***

LINES 4 & 5 on Page 3: 5200 & 5210-MEDICARE & FICA:
The report reflects actual data resulting from savings based on actual salaries. Unpaid vacancies, turnover, and unpaid leaves. Actual is $42,498 FAV, previously $28,000 FAV.

LINE 6: 5220 on Page 3-WORKERS' COMPENSATION:
The workers' compensation account is $22,475 FAV. ***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 were 102.2%, previously 104.2% of budget. Stop-loss credits totaling $192,801 were applied to March and April claims. Fees are offset by pharmacy rebates resulting in a combined utilization is 92.3% of budget. The June invoices were lower than budgeted for both claims and fees, with a large credit on the last weekly billing cycle.***
The forecast projects actual claims and fees of current employees and retirees will be $503,679 FAV, previously $90,000 FAV. The final billing in June was a sizeable credit.
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*
JUL	***$ 847,639***	$ 368,077	*$ 479,562*	$ 347,337	$ 364,829
AUG	***$ 398,153***	$ 608,013	*$ (209,860)*	$ 488,825	$ 641,037
SEP	***$ 344,933***	$ 485,660	*$ (140,727)*	$ 404,062	$ 412,377
OCT	***$ 503,432***	$ 477,606	*$ 25,826*	$ 549,988	$ 508,930
NOV	***$ 472,761***	$ 489,383	*$ (16,622)*	$ 458,288	$ 541,882
DEC	***$ 740,382***	$ 607,751	*$ 132,631*	$ 477,519	$ 363,042
JAN	***$ 438,636***	$ 344,031	*$ 94,605*	$ 328,754	$ 220,714
FEB	***$ 214,599***	$ 286,051	*$ (71,452)*	$ 382,582	$ 183,906
MAR	***$ 208,604***	$ 335,443	*$ (126,839)*	$ 303,213	$ 261,829
APR	***$ 536,182***	$ 365,182	*$ 171,000*	$ 401,225	$ 266,018
MAY	***$ 327,218***	$ 443,521	*$ (116,303)*	$ 486,801	$ 456,890
JUN	***$ 324,791***	$ 432,806	$ (108,015)	$ 486,018	$ 369,321
TOTALS	**$ 5,357,330**	**$ 5,243,525**	**$ 113,805**	**$ 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%	***102.2%***

FEES 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*
JUL	***$ 45,277***	$ 38,265	***$ 7,012***	$ 50,798	$ 44,555
AUG	***$ 58,223***	$ 74,412	***$ (16,189)***	$ 54,969	$ 54,176
SEP	***$ 58,040***	$ 54,073	***$ 3,967***	$ 14,743	$ 53,028
OCT	***$ (26,312)***	$ 59,959	***$ (86,271)***	$ 53,552	$ 52,666
NOV	***$ 60,629***	$ 59,397	***$ 1,232***	$ 53,061	$ 53,732
DEC	***$ 7,554***	$ 62,289	***$ (54,735)***	$ 51,875	$ 53,218
JAN	***$ (109,079)***	$ 29,815	***$ (138,894)***	$ (6,882)	$ 48,165
FEB	***$ 73,623***	$ 85,092	***$ (11,469)***	$ 82,020	$ 57,785
MAR	***$ 58,939***	$ 39,994	***$ 18,945***	$ (10,286)	$ (8,744)
APR	***$ (88,754)***	$ 55,700	***$ (144,454)***	$ 55,644	$ 46,575
MAY	***$ 59,225***	$ 58,335	***$ 890***	$ 55,040	$ 41,342
JUN	***$ (133,195)***	$ 16,538	$ (149,733)	$ (36,549)	$ (6,272)
TOTALS	**$ 64,170**	**$ 633,867**	***$ (569,697)***	$ 417,985	$ 490,226

<u>LINE 9 on Page 3: 5260-LIFE INSURANCE:</u>
The actual account spend is $5,956 FAV, due to staff turnover.

LINE 10 on Page 3: 5275-DISABILITY INSURANCE:
The actual account spend is $1,923 FAV.

LINE 12 on Page 3: 5281-DEFINED CONTRIBUTION RETIREMENT PLAN:
The actual account spend is ***$53,728 UNF, previously $40,000 UNF.***

LINE 16 on Page 3: 5290-UNEMPLOYMENT:
The actual account spend is $8,540 FAV, previously $8,700 FAV.

LINE 18 on Page 3: 5292-TUITION REIMBURSEMENT:
The account based on actual requests for reimbursements, $5,293 FAV, previously $5,000 FAV.

LINE 20 on Page 3: 5322-INSTRUCTIONAL PROGRAM IMPROVEMENT:
The actual account spend is $34,458 FAV, previously neutral. A transfer was approved for IXL software in June. Funds were transferred from this account to support curriculum writing.

LINE 21 on Page 3: 5327-DATA PROCESSING:
The account is $28,486 UNF, previously $27,726 UNF. A transfer was approved for bus routing software in June, $33,426.

LINE 22 on Page 3: 5330-PROFESSIONAL TECHNICAL SERVICES:
The account is $223,490 UNF, previously $137,789 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 UNF. 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. There were transfers approved in June for $57,500 UNF to support the development of a comprehensive Board-led strategic planning process designed to establish a shared vision and long-term direction for the District and special education services $11,000 UNF. The contracted services for special education were an additional $62,152 UNF, legal fees were $118,000 more than budgeted. The account deficit was offset by the cost of interns for the 3 schools, which were less than budgeted, $51,257 FAV.

LINE 23 on Page 3: 5440-RENTALS:
The actual account spend is $9,803 FAV. A transfer was approved in March to support special education services, $2,500 FAV. ***Rentals for high school events (tables & chairs) were less than budgeted, $5,671 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 actual account spend is $63,182 FAV, previously $175,405 UNF. Special education transportation was $46,655***

FAV, field trips and athletics was $6,655 FAV, regular transportation was $8,613 FAV, and Vo-tech schools were $1,259

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. ***The actual account spend is $26,159 FAV, previously $4,613 FAV. The cyber insurance policy was aligned with the fiscal year, $19,973 FAV.***

LINE 26 on Page 3: 5550-COMMUNICATION: TEL, POST, ETC:
The actual account spend is $19,050 FAV, previously neutral. There was $5,400 FAV for postage, $4,910 FAV on the Board account and $8,200 saved from the CEN credits FAV.

LINE 27 on Page 3: 5560-TUITION EXPENSE:
Special Education tuition is under review as student enrollment and needs are not finalized for the start of the year. ***The forecast for these accounts is $384,387 FAV previously $380,034 FAV. Data changes based on actual student placements and services.*** A transfer was approved in March for contact services, $3,002 UNF. Another transfer was approved in April for special education services at Vo-Ag schools.

Tuition for the Vo-Ag schools is $24,576 UNF, previously $34,560 UNF.

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

Public (ACES) and private out-of-district placements are $379,672 FAV, previously $396,592 FAV.

	FY21-22 ACTUAL	FY22-23 ACTUAL	FY23-24 ACTUAL	FY24-25 ACTUAL	FY25-26 BUDGET	FY25-26 ACTUAL
Public SPED	10	9	8	9	10	***10(10)***
Private SPED	20	16	19	15	21	***19(19)***
Totals	30	25	27	24	31	***29(29)***

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. The account is overbudget at $258,534 UNF, previously $249,500 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. The accounts were reviewed again before issuing the credit to the District, and UI determined the District is not owed any credit. We are now reviewing the UI accounts that are reporting higher kwh utilized. 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: $122,588 and VNM credits from April 2025 to date are $60,435.***

The budget for propane was $4,575. ***The actual account spend was $3,785, or $790 FAV, previously neutral.***

The budget for water is $60,000. ***The actual account spend was $68,193, or $8,193 UNF, previously 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. ***The actual account spend was $35,634 or $4,525 UNF, previously $3,803 UNF.***

ELECTRICITY (KILOWATT HOURS)

MONTH	2025-2026 FORECAST	2025-2026 BUDGET	VARIANCE	2024-2025 ACTUAL	2023-2024 ACTUAL
JUL	***391,045***	305,906	***85,139***	352,636	275,363
AUG	***397,458***	335,816	***61,642***	341,068	339,333
SEP	***353,839***	306,316	***47,523***	315,393	295,827
OCT	***375,487***	269,943	***105,544***	302,667	250,944
NOV	***344,064***	256,908	***87,156***	264,619	251,734
DEC	***298,846***	252,134	***46,712***	259,154	233,988
JAN	***322,371***	271,152	***51,219***	292,535	271,629
FEB	***328,829***	264,207	***64,622***	268,168	255,916
MAR	***283,981***	255,758	***28,223***	263,087	242,795
APR	***321,585***	267,046	***54,539***	290,631	262,074
MAY	***345,700***	279,618	***66,082***	299,083	288,966
JUN	***392,556***	312,196	***80,360***	340,831	320,107
Totals	**4,155,761**	**3,377,000**	***778,761***	**3,589,872**	**3,288,676**

DEGREE DAYS
There are 5,687 degree days to date as opposed to 5,032 last year.

LINE 34 on Page 4: 5420-REPAIRS & MAINTENANCE: ***The forecast is $$6,179 FAV, previously $11,766 FAV.*** 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 $6,559.45, 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. 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 was requested from contingency in March. There was a transfer approved in June to cover power-washing the high school using the remaining funds across the district's repair & maintenance accounts. The positive balance is the remainder of 27 various accounts.

LINE 35 on Page 4: 5611-INSTRUCTIONAL SUPPLIES: ***The forecast is $44,677 FAV, based on actual account balances, previously $52,036 FAV. A large portion of the balance, $23,210 FAV, is from science supplies at the high school which vary by lab projects and the high school principal accounts spent less than budgeted, $15,452 FAV.***

LINE 36 on Page 4: 5613-MAINTENANCE SUPPLIES: ***The forecast is $17,386 FAV, previously neutral.***

LINE 37 & 38 on Page 4: 5620 & 5621-OIL & NATURAL GAS:
The budget for natural gas is $99,100 and the budget for oil is $2.409 per gallon, and $52,089 annually or 21,000 gallons. ***The oil account was $7,137 over budget.*** A circulator pump for the heat exchanger loop connected to the fuel cell failed and the part has been on order for 4 weeks. The high school has been utilizing natural gas to heat the building during

the coldest part of the winter. ***Natural gas account was over budget $74,654 UNF, previously $78,000 UNF.***

LINE 39 on Page 4: 5627-TRANSPORTATION SUPPLIES: ***The actual amount spent is $58,775 FAV, previously $5,000 FAV.***

LINE 40 on Page 4: 5641-TEXTBOOKS & 5642 Library Books:
The actual amount spent is $33,989 FAV due to order needs and price changes, previously $25,942 FAV.

LINE 42 on Page 4: 5690-OTHER SUPPLIES:
The actual amount spent is $13,193 FAV, previously $25,000 FAV.

LINE 43 on Page 4: 5695-OTHER SUPPLIES-TECHNOLOGY:
The actual amount spent is $36,005 FAV, previously neutral. Software programs are reviewed for actual usage before reordering and for best pricing which results in savings.

LINE 45 on Page 4: 5730-EQUIPMENT -NEW:
The actual amount spent is $13,496 UNF, previously $11,540 UNF. A transfer was approved in April for risers for chorus. A transfer was approved in June for $6,000 for special education furniture this month.

LINE 46 on Page 4: 5731-EQUIPMENT -REPLACEMENT:
The actual amount spent is $37,916 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 was funded through the Carl Perkins grant.

LINE 47 & 48 on Page 4: 5732 & 5733-EQUIPMENT –TECHNOLOGY-NEW & REPLACEMENT:
The actual amount spent is $51,958 UNF, previously neutral. There was budget transfer approved to consolidate many of the technology accounts into the middle school accounts to prioritize purchases for the rest of the year. This budget transfer request is to purchase student devices for the middle school technology education program.

LINE 52 on Page 4: 5715-IMPROVEMENTS TO BUILDINGS:
The actual amount spent is $241,860 UNF. Transfers were approved for power washing and brick mortar repair, $32,330 UNF, the purchase of a greenhouse, $19,000 UNF and a new PA System , $190,186 UNF, all at ARHS.

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 was a transfer approved in April for $52,069 UNF to cover snow removal and backstop repairs. The balance in the account $47,931 FAV after transfers were approved. A transfer was approved into this account in May for updating the PA system at ARHS, $190,186 UNF. ***The balance in the account is zero.***

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 $19,350 UNF, previously $20,749 UNF. A transfer was approved in June from this account to cover the power-washing at the high school, $32,330 which is offset by $16,989 available due to lower pricing on the storage buildings at the middle schools.

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 balance in general contingency is zero, previously $20,075 FAV, which was applied to the utility accounts.*** There were transfers approved in June for a greenhouse at the high schools $19,000 UNF, bus routing software $33,425 UNF and strategic planning for the District, $57,500 UNF.

LINE 55 and 56 on Page 5: 5580 and 5581-TRAVEL AND CONFERENCES:
The forecast is $26,417 FAV, previously $22,000 FAV.

LINE 57 on Page 5: 5810-DUES & FEES:
The forecast is $13,277 FAV, previously $10,000 FAV.

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 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 $898,605 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.***

AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES AND EXPENDITURES
FY 2026-2027

LINE	CATEGORY	COLUMN 1 2025-2026 ACTUAL	COLUMN 2 2026-2027 BUDGET	COLUMN 3 JUL 26 FORECAST	COLUMN 4 CHANGE INCR./(DECR.)	COLUMN 5 JUL 26 FORECAST	COLUMN 6 VARIANCE OVER/(UNDER)	COL 7 FAV UNF
1	MEMBER TOWN ALLOCATIONS	56,835,803	57,261,870	57,261,870	0	57,261,870	0	FAV
2	OTHER REVENUE	314,404	211,342	211,342	2,295	213,637	2,295	FAV
3	OTHER STATE GRANTS	1,139,388	1,315,000	1,315,000	0	1,315,000	0	FAV
4	MISCELLANEOUS INCOME	22,400	21,000	21,000	0	21,000	0	FAV
5	**TOTAL REVENUES**	**58,311,995**	**58,809,212**	**58,809,212**	**2,295**	**58,811,507**	**2,295**	**FAV**
6	SALARIES	31,948,569	34,089,387	34,089,387	(25,379)	34,064,008	(25,379)	FAV
7	BENEFITS	6,616,978	7,666,427	7,666,427	13,357	7,679,784	13,357	UNF
8	PURCHASED SERVICES	10,609,181	11,074,250	11,074,250	(1,490)	11,072,760	(1,490)	FAV
9	DEBT SERVICE	2,552,296	1,491,250	1,491,250	0	1,491,250	0	FAV
10	SUPPLIES (INCLUDING UTILITIES)	3,695,639	3,649,090	3,649,090	0	3,649,090	0	FAV
11	EQUIPMENT	377,770	212,901	212,901	0	212,901	0	FAV
12	IMPROVEMENTS / CONTINGENCY	721,511	330,500	330,500	0	330,500	0	FAV
13	DUES AND FEES	189,688	295,407	295,407	0	295,407	0	FAV
14	TRANSFER ACCOUNT	1,162,179	0	0	0	0	0	FAV
15	**TOTAL EXPENDITURES**	**57,873,812**	**58,809,212**	**58,809,212**	**(13,512)**	**58,795,700**	**(13,512)**	**FAV**
16	**SUBTOTAL**	**438,185**	**0**	**0**	**(11,217)**	**15,807**	**15,807**	**FAV**
17	PLUS: CANCELLATION OF PRIOR YEAR'S ENCUMBRANCES	**142,564**	**0**	**0**	**0**	**0**	**0**	**FAV**
18	DESIGNATED FOR SUBSEQUENT YEAR'S BUDGET:	**0**	**0**	**0**	**0**	**0**	**0**	**FAV**
19	**NET BALANCE / (DEFICIT)**	**580,749**	**0**	**0**	**(11,217)**	**15,807**	**15,807**	**FAV**

87

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

AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES AND EXPENDITURES
FY 2026-2027

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2025-2026	2026-2027	JUL 26	CHANGE	JUL 26	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
1	BETHANY ALLOCATION	9,012,747	9,423,586	9,423,586	0	9,423,586	0	FAV
1a	PRIOR YEAR CREDIT BETHANY	147,479	0	0		0	0	
2	ORANGE ALLOCATION	27,087,476	27,363,157	27,363,157	0	27,363,157	0	FAV
2a	PRIOR YEAR CREDIT ORANGE	446,061	0	0		0	0	
3	WOODBRIDGE ALLOCATION	19,836,976	20,475,127	20,475,127	0	20,475,127	0	FAV
3a	PRIOR YEAR CREDIT WOODBRIDGE	305,064	0	0		0	0	
4	**MEMBER TOWN ALLOCATIONS**	**56,835,803**	**57,261,870**	**57,261,870**	**0**	**57,261,870**	**0**	**FAV**
5	ATHLETICS	26,448	26,000	26,000	0	26,000	0	FAV
6	INVESTMENT INCOME	126,277	60,000	60,000	0	60,000	0	FAV
7	PARKING INCOME	30,319	29,000	29,000	0	29,000	0	FAV
8	RENTAL INCOME	13,765	16,000	16,000	0	16,000	0	FAV
9	TUITION REVENUE	117,596	80,342	80,342	2,295	82,637	2,295	FAV
10	TRANSPORTATION BOWA AGREEMENT	0	0	0	0	0	0	FAV
11	**OTHER REVENUE**	**314,404**	**211,342**	**211,342**	**2,295**	**213,637**	**2,295**	**FAV**
12	ADULT EDUCATION	4,984	5,300	5,300	0	5,300	0	FAV
13	OPEN CHOICE	187,608	125,000	125,000	0	125,000	0	FAV
14	SPECIAL EDUCATION GRANTS	929,896	1,164,700	1,164,700	0	1,164,700	0	FAV
15	TRANSPORTATION INCOME-MAGNET	16,900	20,000	20,000	0	20,000	0	FAV
16	**OTHER STATE GRANTS**	**1,139,388**	**1,315,000**	**1,315,000**	**0**	**1,315,000**	**0**	**FAV**
17	INTERGOVERNMENTAL REVENUE	0	0	0	0	0	0	FAV
18	OTHER REVENUE	22,400	21,000	21,000	0	21,000	0	FAV
19	TRANSFER IN	0	0	0	0	0	0	FAV
20	**MISCELLANEOUS INCOME**	**22,400**	**21,000**	21,000	**0**	**21,000**	**0**	**FAV**
21	**TOTAL REVENUES**	**58,311,995**	**58,809,212**	**58,809,212**	**2,295**	**58,811,507**	**2,295**	**FAV**

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

AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES AND EXPENDITURES
FY 2026-2027

LINE	CATEGORY	COLUMN 1 2025-2026 ACTUAL	COLUMN 2 2026-2027 BUDGET	COLUMN 3 JUL 26 FORECAST	COLUMN 4 CHANGE INCR./(DECR.)	COLUMN 5 JUL 26 FORECAST	COLUMN 6 VARIANCE OVER/(UNDER)	COL 7 FAV UNF
1	5111-CERTIFIED SALARIES	26,418,634	28,174,113	28,174,113	(19,640)	28,154,473	(19,640)	FAV
2	5112-CLASSIFIED SALARIES	5,529,935	5,915,274	5,915,274	(5,739)	5,909,535	(5,739)	FAV
3	**SALARIES**	**31,948,569**	**34,089,387**	**34,089,387**	**(25,379)**	**34,064,008**	**(25,379)**	**FAV**
4	5200-MEDICARE - ER	444,704	490,298	490,298	0	490,298	0	FAV
5	5210-FICA - ER	365,997	388,277	388,277	0	388,277	0	FAV
6	5220-WORKERS' COMPENSATION	147,100	166,296	166,296	13,357	179,653	13,357	UNF
7	5255-MEDICAL & DENTAL INSURANCE	4,334,074	5,389,211	5,389,211	0	5,389,211	0	FAV
8	5860-OPEB TRUST	312,673	236,648	236,648	0	236,648	0	FAV
9	5260-LIFE INSURANCE	50,505	55,385	55,385	0	55,385	0	FAV
10	5275-DISABILITY INSURANCE	13,093	14,758	14,758	0	14,758	0	FAV
11	5280-PENSION PLAN - CLASSIFIED	681,191	672,066	672,066	0	672,066	0	FAV
12	5281-DEFINED CONTRIBUTION RETIREMENT PLAN	236,899	202,283	202,283	0	202,283	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	6,960	19,605	19,605	0	19,605	0	FAV
17	5291-CLOTHING ALLOWANCE	2,075	4,600	4,600	0	4,600	0	FAV
18	5292-TUITION REIMBURSEMENT	21,707	27,000	27,000	0	27,000	0	FAV
19	**BENEFITS**	**6,616,978**	**7,666,427**	**7,666,427**	**13,357**	**7,679,784**	**13,357**	**UNF**
20	5322-INSTRUCTIONAL PROG IMPROVEMENT	29,742	46,000	46,000	0	46,000	0	FAV
21	5327-DATA PROCESSING	186,435	168,668	168,668	0	168,668	0	FAV
22	5330-PROFESSIONAL & TECHNICAL SRVC	2,825,962	2,540,164	2,540,164	0	2,540,164	0	FAV
23	5440-RENTALS - LAND, BLDG, EQUIPMENT	113,524	135,428	135,428	0	135,428	0	FAV
24	5510-PUPIL TRANSPORTATION	4,121,606	4,534,645	4,534,645	0	4,534,645	0	FAV
25	5521-GENERAL LIABILITY INSURANCE	298,269	346,137	346,137	(1,490)	344,647	(1,490)	FAV
26	5550-COMMUNICATIONS: TEL, POST, ETC.	114,084	166,358	166,358	0	166,358	0	FAV
27	5560-TUITION EXPENSE	2,814,418	3,014,493	3,014,493	0	3,014,493	0	FAV
28	5590-OTHER PURCHASED SERVICES	105,141	122,357	122,357	0	122,357	0	FAV
29	**PURCHASED SERVICES**	**10,609,181**	**11,074,250**	**11,074,250**	**(1,490)**	**11,072,760**	**(1,490)**	**FAV**

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

AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES AND EXPENDITURES
FY 2026-2027

LINE	CATEGORY	COLUMN 1 2025-2026 ACTUAL	COLUMN 2 2026-2027 BUDGET	COLUMN 3 JUL 26 FORECAST	COLUMN 4 CHANGE INCR./(DECR.)	COLUMN 5 JUL 26 FORECAST	COLUMN 6 VARIANCE OVER/(UNDER)	COL 7 FAV UNF
30	5830-INTEREST	235,850	146,250	146,250	0	146,250	0	FAV
31	5910-REDEMPTION OF PRINCIPAL	2,316,446	1,345,000	1,345,000	0	1,345,000	0	FAV
32	**DEBT SERVICE**	**2,552,296**	**1,491,250**	**1,491,250**	**0**	**1,491,250**	**0**	**FAV**
33	5410-UTILITIES, EXCLUDING HEAT	988,882	875,959	875,959	0	875,959	0	FAV
34	5420-REPAIRS, MAINTENANCE & CLEANING	851,173	853,839	853,839	0	853,839	0	FAV
35	5611-INSTRUCTIONAL SUPPLIES	391,420	448,426	448,426	0	448,426	0	FAV
36	5613-MAINTENANCE/CUSTODIAL SUPPLIES	203,064	174,050	174,050	0	174,050	0	FAV
37	5620-OIL USED FOR HEATING	62,397	57,427	57,427	0	57,427	0	FAV
38	5621-NATURAL GAS	173,754	99,100	99,100	0	99,100	0	FAV
39	5627-TRANSPORTATION SUPPLIES	150,725	178,605	178,605	0	178,605	0	FAV
40	5641-TEXTS & DIGITAL RESOURCES	139,175	128,755	128,755	0	128,755	0	FAV
41	5642-LIBRARY BOOKS & PERIODICALS	19,143	20,530	20,530	0	20,530	0	FAV
42	5690-OTHER SUPPLIES	256,048	273,042	273,042	0	273,042	0	FAV
43	5695-OTHER SUPPLIES-TECHNOLOGY	459,859	539,357	539,357	0	539,357	0	FAV
44	**SUPPLIES (INCLUDING UTILITIES)**	**3,695,639**	**3,649,090**	**3,649,090**	**0**	**3,649,090**	**0**	**FAV**
45	5730-EQUIPMENT - NEW	17,996	2,700	2,700	0	2,700	0	FAV
46	5731-EQUIPMENT - REPLACEMENT	143,533	66,861	66,861	0	66,861	0	FAV
47	5732-EQUIPMENT - TECH - NEW	20,482	22,340	22,340	0	22,340	0	FAV
48	5733-EQUIPMENT - TECH - REPLACEMENT	195,759	121,000	121,000	0	121,000	0	FAV
49	**EQUIPMENT**	**377,770**	**212,901**	**212,901**	**0**	**212,901**	**0**	**FAV**
50	5715-IMPROVEMENTS TO BUILDING	567,860	58,000	58,000	0	58,000	0	FAV
51	5715-FACILITIES CONTINGENCY	-100,000	100,000	100,000	0	100,000	0	FAV
51a	TRSF. FROM FACILITIES CONTINGENCY	100,000	0	0	0	0	0	FAV
52	5720-IMPROVEMENTS TO SITES	153,650	52,500	52,500	0	52,500	0	FAV
53	5850-DISTRICT CONTINGENCY	-150,000	120,000	120,000	0	120,000	0	FAV
53a	TRSF. FROM CONTINGENCY TO OTHER ACCTS.	150,000	0	0	0	0	0	FAV
54	**IMPROVEMENTS / CONTINGENCY**	**721,511**	**330,500**	**330,500**	**0**	**330,500**	**0**	**FAV**

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

AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES AND EXPENDITURES
FY 2026-2027

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2025-2026	2026-2027	JUL 26	CHANGE	JUL 26	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
55	5580-STAFF TRAVEL	21,390	27,408	27,408	0	27,408	0	FAV
56	5581-TRAVEL - CONFERENCES	65,288	94,826	94,826	0	94,826	0	FAV
57	5810-DUES & FEES	103,009	173,173	173,173	0	173,173	0	FAV
58	**DUES AND FEES**	**189,688**	**295,407**	**295,407**	**0**	**295,407**	**0**	**FAV**
59	**5856-TRANSFER ACCOUNT**	1,162,179	**0**	**0**	**0**	**0**	**0**	**FAV**
60	**TOTAL EXPENDITURES**	**57,873,812**	**58,809,212**	**58,809,212**	**(13,512)**	**58,795,700**	**(13,512)**	**FAV**
61 **Note:**	**RESTRICTED - RETURN TO TOWNS**	**580,749**						

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

AMITY REGIONAL SCHOOL DISTRICT NO. 5
REVENUES & EXPENDITURES BY CATEGORY
FINANCIAL ANALYSIS
FOR THE FISCAL YEAR 2026-2027

JULY 2027

2026-2027 FORECAST

OVERVIEW

The projected unspent fund balance for this fiscal year is $15,807 FAV, which appears on page 1, column 6, and line 19. The additional revenue and unspent funds from fiscal year 2026, $580,748 will be deducted from the town allocations in March 2027. This is comprised of $202,997 of FY26 extra revenue, $235,187 of unspent funds and $142,564 in FY25 unspent encumbrances. The Board may approve 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 $1,176,183 of the current budget if funds become available. The item will be requested at the August 2027 meeting.

REVENUES BY CATEGORY

The projected balance of revenues is ***$2,295 FAV***, which appears on page 2, column 6, line 21.

LINE 5 on Page 2: ATHLETICS:
The forecast is based on historical data of State payments. ***The forecast is neutral***.

LINE 6 on Page 2: INVESTMENT INCOME:
The forecast is based on historical data of State payments. ***The forecast is neutral***.

Month	M&T Bank	State Treasurer's Investment Fund
July 2025	.40%	5.43%

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 five tuition students, two at reduced employee rates. **Full tuition rate is $23,083.** The actual tuition charged is higher $641 per full rate student than budgeted. Currently, eight tuition students are enrolled, including four at reduced employee rates. ***The forecast is $2,295 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 neutral***.

LINE 13 on Page 2: OPEN CHOICE:
The forecast is based on historical data of State payments. ***The forecast is neutral***.

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. The budget is based on a 60% reimbursement rate. The final reimbursement rate for FY26 was 62.92%***. The forecast is neutral***.

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 neutral***.

LINE 18 on Page 2: OTHER REVENUE:
The forecast is based on the budget developed on historical payments. ***The forecast is neutral***.

EXPENDITURES BY CATEGORY

The projected yearend balance of expenditures is ***$13,512 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. ***The forecast is $19,640 due to estimate turnover projections***.

LINE 2 on Page 3: 5112-CLASSIFIED SALARIES:
The forecast is $5,739 FAV due to vacancies.

LINES 4 & 5 on Page 3: 5200 & 5210-MEDICARE & FICA:
The forecast is neutral.

LINE 6: 5220 on Page 3-WORKERS' COMPENSATION:
The workers' compensation account is forecasted to be $13,357 UNF due to higher premium.

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.
The forecast projects actual claims and fees of current employees and retirees will be neutral. The projected monthly budget is based on an average of five years of claims.

CLAIMS OF CURRENT EMPLOYEES AND RETIREES

MONTH	2026-2027 ACTUAL	2026-2027 BUDGET	VARIANCE	*2025-2026 ACTUAL*	*2024-2025 ACTUAL*
JUL	***$ 647,080***	$ 524,275	***$ 122,805***	$ 847,639	$ 347,337
AUG	$ 673,934	$ 673,934	*$* -	$ 398,153	$ 488,825
SEP	$ 512,286	$ 512,286	*$* -	$ 344,933	$ 404,062
OCT	$ 542,906	$ 542,906	*$* -	$ 503,432	$ 549,988
NOV	$ 518,858	$ 518,858	*$* -	$ 472,761	$ 458,288
DEC	$ 686,668	$ 686,668	*$* -	$ 740,382	$ 477,519
JAN	$ 399,514	$ 399,514	*$* -	$ 438,636	$ 328,754
FEB	$ 282,984	$ 282,984	*$* -	$ 214,599	$ 382,582
MAR	$ 333,231	$ 333,231	*$* -	$ 208,604	$ 303,213
APR	$ 432,641	$ 432,641	*$* -	$ 536,182	$ 401,225
MAY	$ 478,727	$ 478,727	*$* -	$ 327,218	$ 486,801
JUN	$ 457,370	$ 457,370	$ -	$ 324,791	$ 486,018
TOTALS	**$ 5,966,200**	**$ 5,843,395**	**$ 122,805**	**$ 5,357,330**	**$ 5,114,612**

ACTUAL/FORECAST CLAIMS AS A PERCENTAGE OF EXPECTED CLAIMS

2022-2023 ACTUAL	2023-2024 ACTUAL	2024-2025 FORECAST	2025-2026 FORECAST	2026-2027 FORECAST
93.6%	99.5%	104.6%	***102.2%***	***102.1%***

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

MONTH	2026-2027 ACTUAL	2026-2027 BUDGET	VARIANCE	2025-2026 ACTUAL	2024-2025 ACTUAL
JUL	$ 72,808	$ 49,298	***$ 23,510***	$ 45,277	$ 50,798
AUG	$ 103,562	$ 103,562	*$* -	$ 58,223	$ 54,969
SEP	$ 74,744	$ 74,744	*$* -	$ 58,040	$ 14,743
OCT	$ 55,444	$ 55,444	*$* -	$ (26,312)	$ 53,552
NOV	$ 82,019	$ 82,019	*$* -	$ 60,629	$ 53,061
DEC	$ 69,236	$ 69,236	*$* -	$ 7,554	$ 51,875
JAN	$ 2,081	$ 2,081	*$* -	$ (109,079)	$ (6,882)
FEB	$ 108,850	$ 108,850	*$* -	$ 73,623	$ 82,020
MAR	$ 47,498	$ 47,498	*$* -	$ 58,939	$ (10,286)
APR	$ 29,901	$ 29,901	*$* -	$ (88,754)	$ 55,644
MAY	$ 79,124	$ 79,124	*$* -	$ 59,225	$ 55,040
JUN	$ (36,030)	$ (36,030)	$ -	$ (133,195)	$ (36,549)
TOTALS	**$ 689,239**	**$ 665,729**	***$ 23,510***	$ 64,172	$ 417,985

LINE 9 on Page 3: 5260-LIFE INSURANCE:
The forecast is neutral.

LINE 10 on Page 3: 5275-DISABILITY INSURANCE:
The forecast is neutral.

LINE 12 on Page 3: 5281-DEFINED CONTRIBUTION RETIREMENT PLAN:
The forecast is neutral..

LINE 16 on Page 3: 5290-UNEMPLOYMENT:
The forecast is neutral.

LINE 18 on Page 3: 5292-TUITION REIMBURSEMENT:
The forecast is neutral.

LINE 20 on Page 3: 5322-INSTRUCTIONAL PROGRAM IMPROVEMENT:
The forecast is neutral.

LINE 21 on Page 3: 5327-DATA PROCESSING:
The forecast is neutral.

LINE 22 on Page 3: 5330-PROFESSIONAL TECHNICAL SERVICES:
The forecast is neutral.

LINE 23 on Page 3: 5440-RENTALS:
The forecast is neutral.

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 neutral.***

LINE 25 on Page 3: 5521-GENERAL LIABILITY INSURANCE: ***The forecast is $1,490 FAV based on actual premiums to date.***

LINE 26 on Page 3: 5550-COMMUNICATION: TEL, POST, ETC:
The forecast is neutral.

LINE 27 on Page 3: 5560-TUITION EXPENSE:
Special Education tuition is under review as student enrollment and needs are not finalized for the start of the year. ***The forecast is neutral***.

Tuition for the Vo-Ag schools is $79,412.

	FY21-22 ACTUAL	FY22-23 ACTUAL	FY23-24 ACTUAL	FY24-25 ACTUAL	FY25-26 ACTUAL	FY26-27 BUDGET	*FY26-27 FORECAST*
Sound	3	3	3	4	***5***	5	*5*
Trumbull	1	3	4	3	***3***	1	*1*
Nonnewaug	9	7	8	4	***5***	8	*8*
Emmett O'Brien	0	2	2	0	***4***	1	*1*
Common Ground Charter HS	1	3	2	0	***1***	0	*0*
Fairchild Wheeler	0	0	0	1	***0***	0	*0*
NH Coop Arts	0	0	0	1	***1***	1	*1*
Wintergreen Magnet	1	0	0	0	***0***	0	*0*
Marine Science Magnet HS	0	1	0	0	***0***	0	*0*
Engineering Science Magnet	0	0	0	1	***1***	1	*1*
Center for Global Studies	0	0	0	0	***1***	0	*0*
Lyman Hall-Vo-AG School	0	0	0	1	***1***	0	*0*
Totals	**15**	**20**	**17**	15	22	**17**	***17***

ECA budget is $64,764.

	FY22-23 ACTUAL	FY23-24 ACTUAL	FY24-25 ACTUAL	FY25-26 ACTUAL	FY26-27 BUDGET	FY26-27 FORECAST
ECA	**18**	**19**	**19**	**14**	**18**	***18***

Public (ACES) and private out-of-district placements are $3,145,196.

	FY22-23 ACTUAL	FY23-24 ACTUAL	FY24-25 ACTUAL	FY25-26 ACTUAL	FY26-27 BUDGET	FY26-27 FORECAST
Public SPED	9	8	9	10	7	*7*
Private SPED	16	19	15	19	18	***18***
Totals	25	27	24	29	25	***25***

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

The 2026-2027 budget for electricity assumes the use of 3,551,901 kilowatt hours at an average price of 0.10793 or a cost of $383,357 before delivery and public benefit charges, total electrical budget is $768,734*. *Forecast is neutral. Year to date public benefit charges total: N/A and VNM credits are N/A.

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

The budget for water is $68,500. ***The forecast is neutral***.

Sewer costs are budgeted at $34,000. ***The forecast is neutral***.

ELECTRICITY (KILOWATT HOURS)

MONTH	2026-2027 FORECAST	2026-2027 BUDGET	VARIANCE	2025-2026 ACTUAL	2024-2025 ACTUAL
JUL	329,891	329,891	-	391,045	352,636
AUG	351,755	351,755	-	397,458	341,068
SEP	316,519	316,519	-	353,839	315,393
OCT	292,530	292,530	-	375,487	302,667
NOV	275,234	275,234	-	344,064	264,619
DEC	260,953	260,953	-	298,846	259,154
JAN	282,742	282,742	-	322,371	292,535
FEB	278,344	278,344	-	328,829	268,168
MAR	260,346	260,346	-	283,981	263,087
APR	277,495	277,495	-	321,585	290,631
MAY	296,791	296,791	-	345,700	299,083
JUN	329,302	329,302	-	344,787	340,831
Totals	**3,551,902**	**3,551,902**	-	**4,107,992**	**3,589,872**

DEGREE DAYS
There are 413 degree days to date as opposed to 508 last year.

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

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

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

LINE 37 & 38 on Page 4: 5620 & 5621-OIL & NATURAL GAS:
The budget for natural gas is $99,100. And the budget for oil is $55,927. The forecast is neutral.

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

LINE 40 on Page 4: 5641-TEXTBOOKS & 5642 Library Books:
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 neutral.

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

LINE 48 on Page 4: 5733-EQUIPMENT –TECHNOLOGY-REPLACEMENT:
The forecast is neutral.

LINE 51 on Page 4: 5715-FACILITIES CONTINGENCY:
The budget includes a $100,000 contingency for unplanned, necessary facility expenditures. The forecast assumes these funds will be entirely used. ***The forecast is neutral***.

LINE 52 on Page 4: 5720-FACILITIES SITE IMPROVEMENTS:
The forecast is neutral.

LINE 53 on Page 4: 5850-CONTINGENCY:
The budget includes a $120,000 contingency for unplanned, necessary expenditures. The forecast assumes these funds will be entirely used. ***The forecast is neutral***.

LINE 55 and 56 on Page 5: 5580 and 5581-TRAVEL AND CONFERENCES:
The forecast is neutral.

LINE 57 on Page 5: 5810-DUES & FEES:
The forecast is neutral.

LINE 59 on Page 5: 5856-TRANSFER:
This line is used to identify funds for the Educational Expenditures Reserve transfers. The District is legally allowed to transfer with Board approval up to 2% or $1,176,183 of the current budget. The item will be presented after the final balance for the FY27 is confirmed at the August/September 2027 meeting.

LINE 61 on Page 5: RESTRICTED: RETURN TO TOWNS:
This line is for the unspent funds from FY26. The unaudited amount of unspent funds is $580,749 FAV and will credited to the member towns' March allocations. This is comprised of $438,184 of excess revenue and unspent funds in FY26 and unliquidated encumbrances from FY25 of $142,564. ***The town allocations will be reduced in March 2027.***

APPENDIX A

COST SAVINGS AND EFFICIENCIES FOR FISCAL YEAR 2025-2026

TOTAL ANNUAL SAVINGS TO-DATE OF: $108,104

$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.

$60,435 Electricity: The District entered into a net metering contract. Credits have started to be applied to the account. Credits applied from April 2025 through May are $50,056.

$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.

$920 Scrap Metal: The facilities staff took old motor parts, wiring and other scap metal to a local metal scrap yard. The funds were deposited in miscellaneous revenue in the general fund.

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).

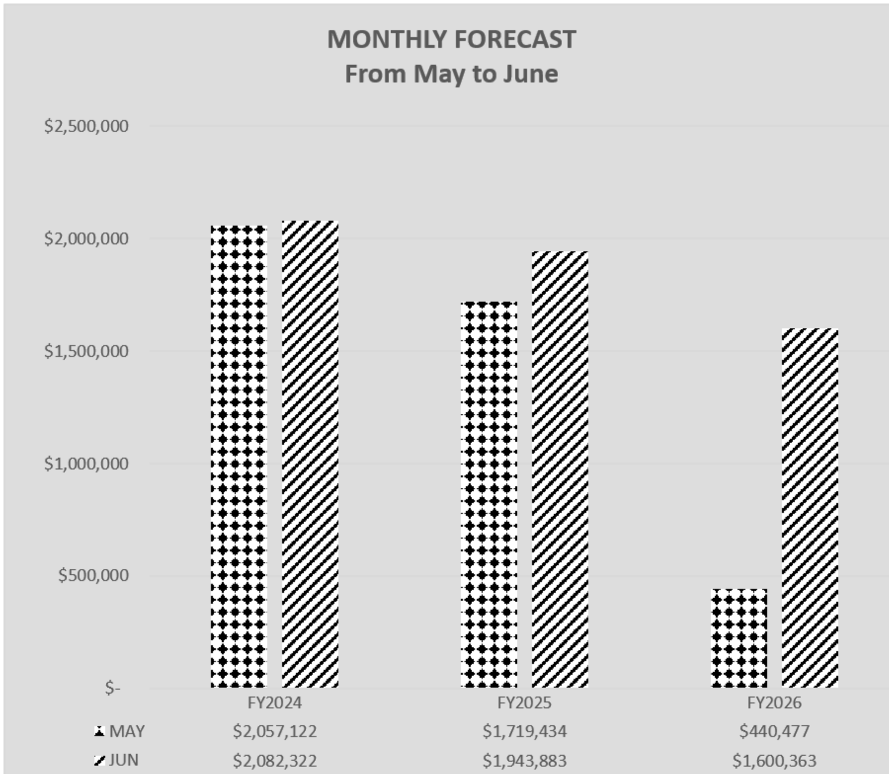
Revenues can be most impacted by decisions made at the State level for Special Education and Transportation grants. The reimbursement rate can change in mid-year as it did in 2024-2025. The State then added a special appropriation in June, the final month of the fiscal year.

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.

FY2024:

The audited fund balance is $991,268 with 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 year-end 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' services and/or attendance in programs.

- **$12,838:** The contingency account was not fully expended as expected.

<u>FY2025:</u>
The audited fund balance is $898,604 with an allocation of 2% or $1,129,132 appropriated to Educational Expenditure Account. The monthly forecast for May 2025 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 contests 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 under budget; 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.

FY2026:

The unaudited fund balance is $438,184 assuming an allocation of 2% or $1,162,179 appropriated to Educational Expenditure Account. The monthly forecast for May 2026 projected a fund balance of $398,147. The change is **$1,202,216 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:

- **$202,996:** The District received more **revenue** than was budgeted in three areas. Investment income was $66,277 higher than budgeted; Open Choice funds were $62,608 higher than budgeted; and special education funds were $45,297 higher than budgeted. All three of these areas fluctuate greatly and are difficult to predict due market volatility, changes in special education services and state reimbursement rates and funding available for Open Choice programs.
- **$163,821**: **Certified and classified salaries** were lower due to the staff turnover leaves of absences and vacancies impacting the District all year. Coverage and substitutes usage was less than budgeted by $102,677; extracurricular and coaching stipends were $35,257 less than budget. For classified staff: There continues to be high turnover in all positions, resulting in savings of $178,673 FAV. Actual spend is $50,322 less for substitutes.
- **$406,289 Benefits** were under budget $42,498 due to lower payroll taxes and life insurance premiums directly related to vacancies, turnover, and leaves of absences; Medical insurance was under budget, $503,679 due to changes in employee coverages, vacancies, additional premiums collected from unpaid leaves and rebates received. The June invoices were lower than budgeted for both claims and fees, with a large credit on the last weekly billing cycle**.** The District received a members' equity credit for workers' compensation of $22,475. These saving were offset by higher contributions to the defined contribution plan.
- **$223,630 Special Education Services** for transportation changes $164,116 and $59,514 for tuition. Special Education transportation and tuition changes in students' services and/or attendance in programs continue all year.
- **$65,022 Supplies** were lower due to favorable pricing and product selection for textbooks, $18,989; technology supplies, $36,005; custodial supplies and maintenance, $23,565;
- **$63,182**: **Transportation** for the late runs, field trips and sporting events were under budget $63,182. Many of the trips and invoices do not happen until the final few months of the school year.
- **$10,707**: **Travel** for **conferences** $2,430 less, and **dues and fee**s, $8,277 less when final invoices were submitted.
- **$156,924 Purchased Services** for legal services were $118,00 more than budgeted including mediation, expulsion, special education, labor, and contract services;

independent contractors, $62,152 were utilized to cover long-term absences and vacancies; and these overages were offset by $51,257 less spent on interns.

- **$325,881**: **Equipment and Improvements to Sites and Buildings** was $325,881 more than budget due to approved projects throughout the year. The projects included power washing,$40,338, adding a greenhouse, $19,000, and upgrading the PA System, $190,186 all at the high school, additional funds for the new truck, $7,500, furniture for new special education classroom, $6,000, fire panel upgrade, $19,999; technology education router, $4,650; chorus risers $7,500, technology education computers for middle school students; $58,324

APPENDIX C

<u>RECAP OF 2023-2024</u>

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

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

<u>FINANCIAL MANAGEMENT:</u> **$ 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.

<u>SPECIAL EDUCATION:</u> **$ 295,125**
These accounts are extremely difficult to forecast. As examples, special need students can be hospitalized; move into the district or leave the district at any time; withdraw from Amity and enroll in Adult Education. Several students who were budgeted to be outplaced were not for a variety of reasons including moving out of the District or returning to District programs. Some transportation needs were coordinated with the elementary districts to reduce the number of singletons on busses for outplacements. Any one of these events can have a significant impact, positive or negative, on the District's special education expenditures. The Director of Pupil Services has been successful in establishing suitable programs for students within the District and a number of students have returned from outplacement. Programs established in District in the past 3 years help keep out of district costs down. The Districts receives revenue directly correlated to special education services and that revenue decreased by $153,489 which is not reflected above.

<u>OTHER:</u> **$1,463,218**

$470,174 SALARIES (OTHER): "Turnover savings" from replacing teachers and other staff who retired or resigned is over budget and savings from unpaid leaves-of-absence. There were a significant number of vacancies during the year creating variances from the budget. The administration utilized many methods to address the vacancies including overtime, temporary staff, and outside agencies. Some positions went unfilled for long periods of time despite our recruitment efforts. More in-house teaching substitutes were hired which reduced our costs with an outside agency and provided more stability. An outside agency was utilized to cover vacant para positions. Turnover savings were exceeded by $284,218 and leave of absences were $185,956.

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

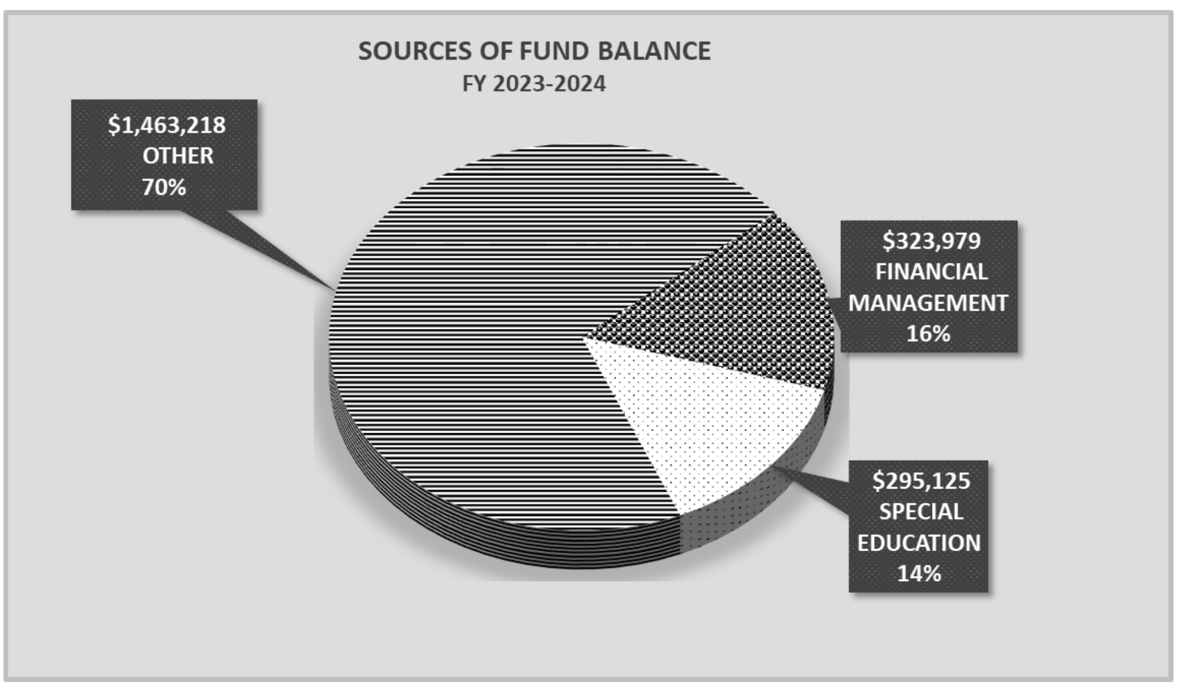
$30,263 STAFF TRAVEL, CONFERENCES AND DUES & FEES (OTHER): Some staff did not attend conferences as planned due to resignations or scheduling constraints. This results in lower registration fees and travel costs. Several students competitions were still virtual, had capped the number of participants,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

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

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

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

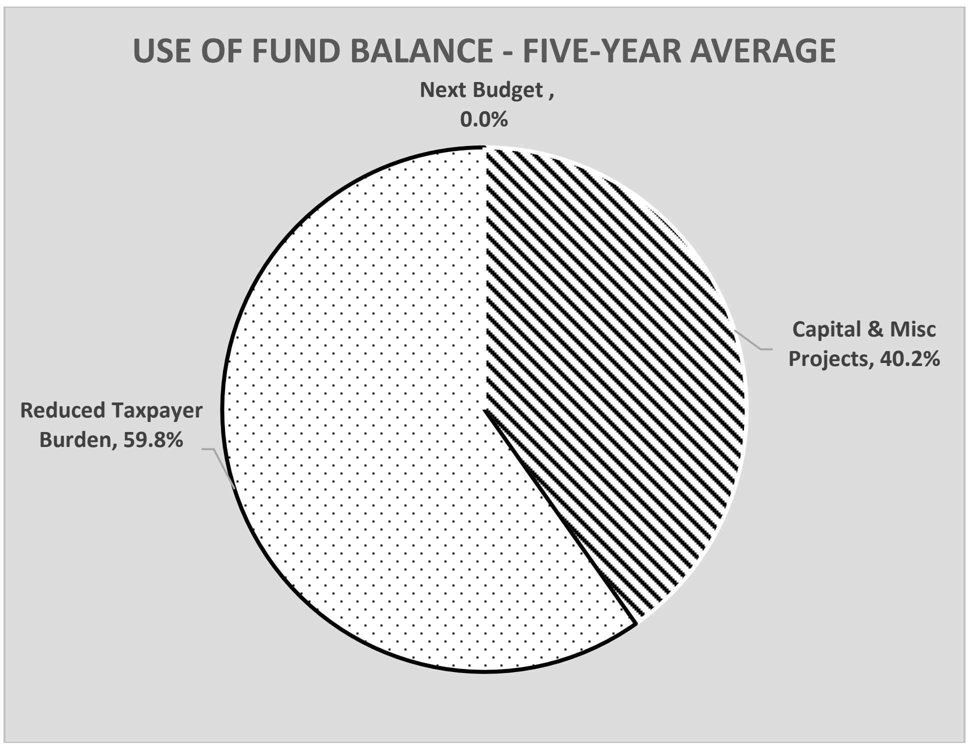
The primary sources of the fund balance are shown graphically below:



The use of the fund balance is proposed as follows:

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

The uses of the fund balance are shown graphically below:



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

APPENDIX D

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.

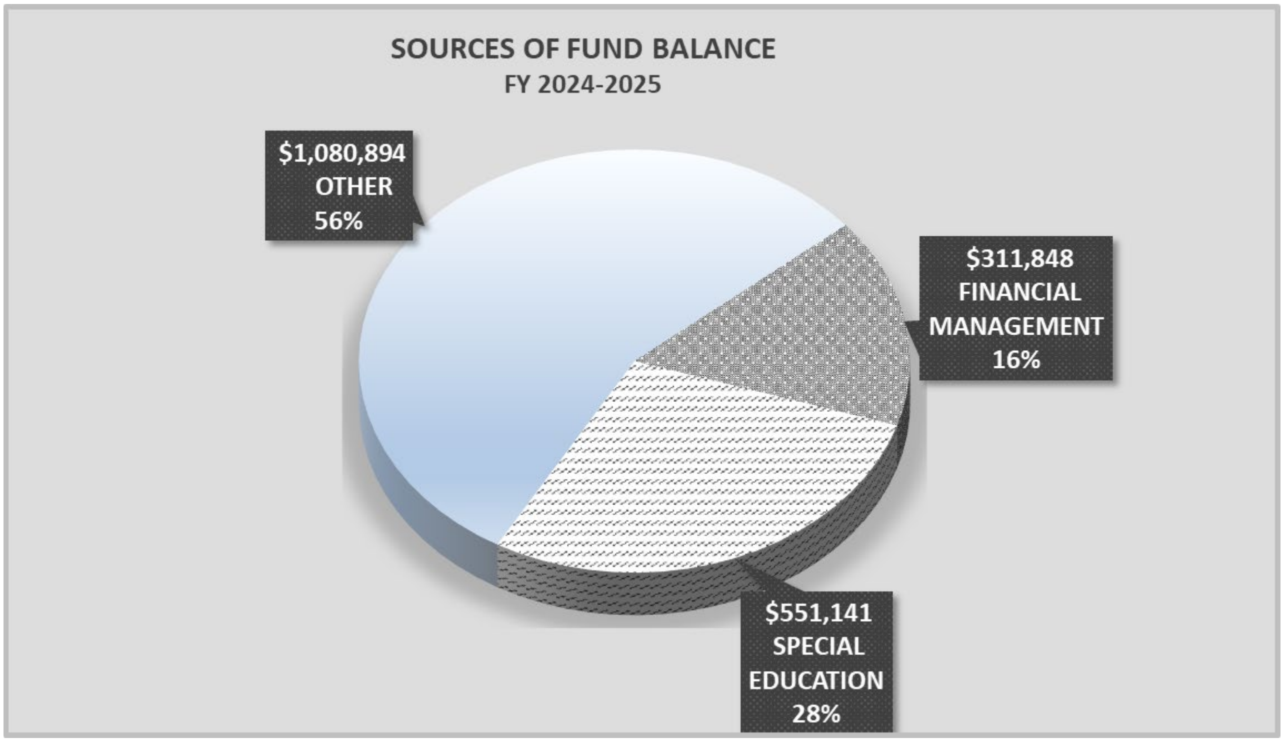
$**42,256 SUPPLIES (OTHER):** Instructional supplies are $63,000 under budget, other supplies are $11,105 under budget, transportation fuel was under budget $9,519 and technology supplies are $13,796 under budget. There was a soft freeze mid-year in response to high medical claims and lower special education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

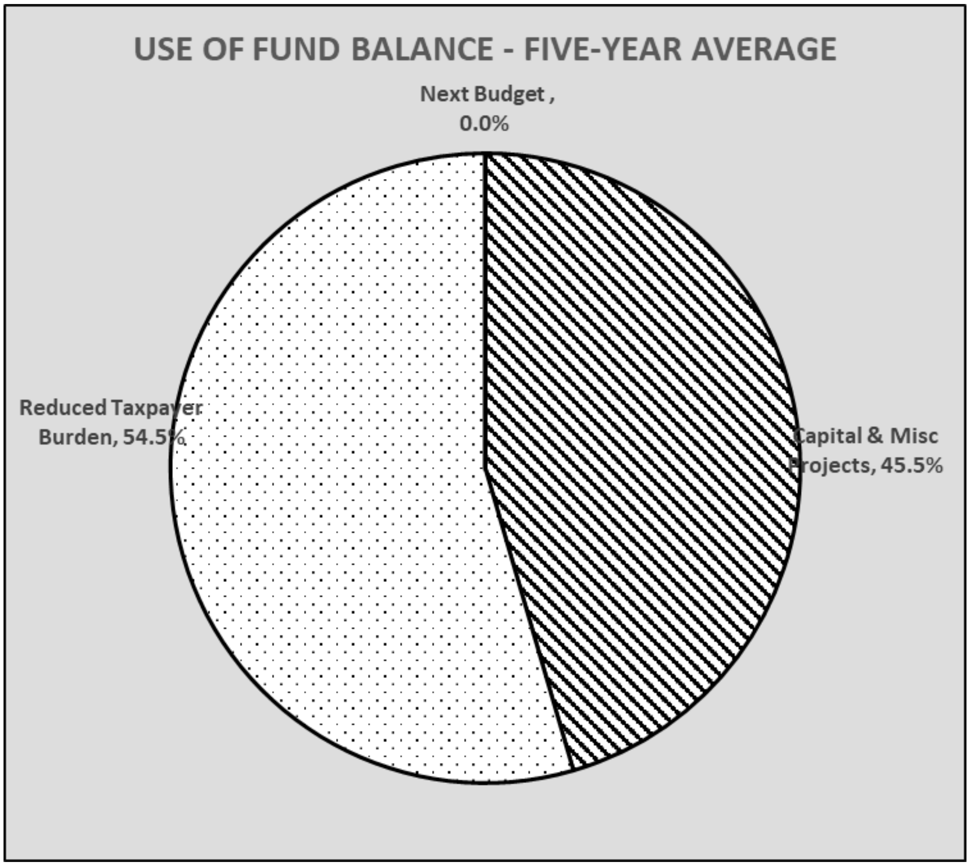
The primary sources of the fund balance are shown graphically below:



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.

APPENDIX E

RECAP OF 2025-2026

Unspent Encumbrances Balance:

The cancellation of 2024-2025 encumbrances of $142,564 will be added to the fund balance credited to the member towns in March of 2027. We encumber funds for goods and services received by June 30th but not yet billed. In some cases, the estimated amount encumbered varies from the actual invoice (e.g., utility bill; water bill, pending special education settlements) and we do not need to spend the entire encumbrance.

The unaudited fund balance for 2024-2025 is $434,184 plus $1,162,179 designated for capital non-recurring projects. The source of the available funds are described below.

FINANCIAL MANAGEMENT: $ 192,949

Our efforts to foster a District culture of finding cost savings and efficiencies has been successful producing savings of $108,104. Grant money was applied for and awarded to offset the cost of the CEN for savings of $21,138 and Medicaid reimbursement increased $13,646 due to increased efforts to obtain and report data. The District saved $60,435 from virtual net metering (VNM) credits from a solar array contract. Instructional and custodial supplies were underspent by $50,856 combined as staff only requested what was needed. Textbook costs were lower due to changes in quantities and competitive pricing, $33,989

SPECIAL EDUCATION : $ 431,042

These accounts are extremely difficult to predict. 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. **Special Education Services** for transportation were under budget $46,655 and $384,387 for tuition. Special Education transportation and tuition charges were less than budgeted due to changes in students' services and/or attendance in programs

OTHER: $ 1,008,075

$202,996: The District received more **revenue** than was budgeted in three areas. Investment income was $66,277 higher than budgeted; Open Choice funds were $62,608 higher than budgeted; and special education funds were $45,297 higher than budgeted. All three of these areas fluctuate greatly and are difficult to predict due market volatility, changes in special education services and state reimbursement rates and funding available for Open Choice programs.

$734,588: **Certified and classified salaries** were lower due to the staff turnover leaves of absences and vacancies impacting the District all year. For certified staff: several staff members were on unpaid **leaves of absences** year-to-date, $67,333; mid-year staff resignations and **vacant** positions for the remainder of the year, was under budget by $161,605; a portion of a certified position for math invention was charged to Title I, $15,000; **turnover** is $54,731 favorable; **coverage and substitutes** usage was less than budgeted by $102,677; **extracurricular and coaching stipends** were $35,257 less than budget. For classified staff: There continues to be high turnover in all positions, resulting in savings of $178,673 FAV. Actual spend is $50,322 less for substitutes.

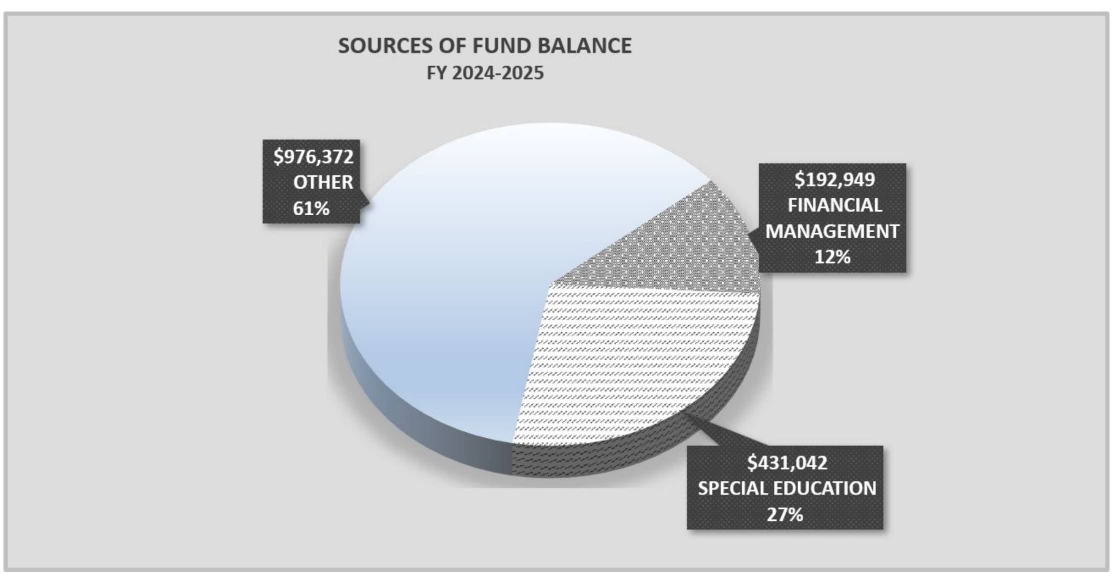
$539,161 Benefits were under budget $42,498 due to lower **payroll taxes and life insurance premiums** directly related to vacancies, turnover, and leaves of absences; **Medical insurance** was under budget, $503,679 due to changes in employee coverages, vacancies, additional premiums collected from unpaid leaves and rebates received. The June invoices were lower than budgeted for both claims and fees, with a large credit on the last weekly billing cycle**.** The District received a members' equity credit for **workers' compensation** of $22,475. These saving were offset by higher contributions to the defined contribution plan.

$**64,954 REPAIRS AND MAINTENANCE & TRANSPORTATION SUPPLIES:** Pricing for fuel for transportation was favorable and repairs were under budget.

$39,693 STAFF TRAVEL, CONFERENCES AND DUES & FEES (OTHER): Grant funding covered the cost of some travel. Several students were award scholarships to attend conferences and contests offsetting the entrance fees.

($573,317) UNPLANNED EXPENSES: The savings noted above were offset by unplanned expenses. **$219,820 -Purchased Services** for bus routing software, $33,425; Strategic planning consultant, $57,500, additional legal fees of $118,000; $62,152 were utilized to cover long-term absences and vacancies; and these overages were offset by $51,257 less spent on interns. **$353,497- Equipment and Improvements to Sites and Buildings** was <u>more</u> than budget due to approved projects throughout the year. The projects included power washing, $40,338, adding a greenhouse, $19,000, and upgrading the PA System, $190,186 all at the high school, additional funds for the new truck, $7,500, furniture for new special education classroom, $6,000, fire panel upgrade, $19,999; technology education router, $4,650; chorus risers $7,500, technology education computers for middle school students; $58,324

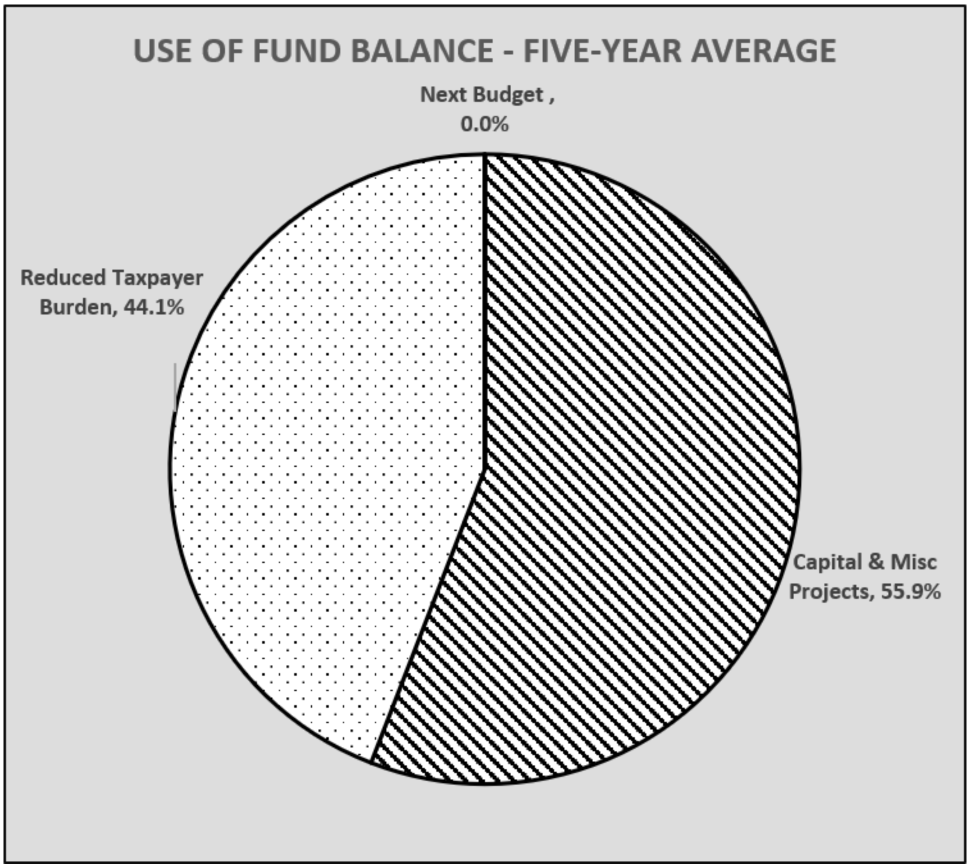
The primary sources of the fund balance are shown graphically below:



The use of the fund balance is proposed as follows:

1. **$1,162,179 - 2.0% pending** approval for designation to Educational Expenditure Reserve
2. **$438,184 –** Credit of additional revenue, unspent fund balance to member towns upon audit completion in March 2027.

The uses of the fund balance are shown graphically below:



Unspent Funds:

The Board of Education may approve 2.0% or $1,162,179 of the FY26 end-of-year funds may be transferred to the Educational Expenditure Reserve. The *unaudited* balance is $580,748 The FY25 unspent encumbrances, $142,564 and additional revenue of $202,997 and $235,187 in unspent funds from FY26 will be credited to the member towns March allocation in 2027.

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

MONTH/YR	JNL#	ACCOUNT NUMBER & DESCRIPTION	AMOUNT	DESCRIPTION
JUL				
Jul-25	53	1 -05-14-2350-5695 SOFTWARE	$ (60.00)	Turn It In Coverage
Jul-25	53	1 -03-11-1005-5695 SOFTWARE	$ 60.00	Turn It In Coverage
Jul-25	127	1 -03-11-3202-5330 PROFESSIONAL & TECH SRVC	$ (680.00)	Hudl Price Increase
Jul-25	127	1 -03-11-3202-5590 OTHER PURCHASED SERVICES	$ 680.00	Hudl Price Increase
AUG				
Aug-25	5	1 -02-14-2350-5695 SOFTWARE	$ 60.00	Blookelt On-Line Subscription
Aug-25	5	1 -02-11-1016-5611 INSTRUCTIONAL SUPPLIES	$ (60.00)	Blookelt On-Line Subscription
Aug-25	6	1 -05-14-2350-5695 SOFTWARE	$ 1,000.00	Final Forms Price Increase
Aug-25	6	1 -03-11-3202-5690 OTHER SUPPLIES	$ (1,000.00)	Final Forms Price Increase
Aug-25	12	1 -01-11-1009-5611 INSTRUCTIONAL SUPPLIES	$ (60.00)	Purchase Deltamath
Aug-25	12	1 -01-14-2350-5695 SOFTWARE	$ 60.00	Purchase Deltamath
Aug-25	13	1 -01-11-1014-5611 INSTRUCTIONAL SUPPLIES	$ (1.00)	Ccss Membership Fee Shortage
Aug-25	13	1 -01-11-1014-5810 DUES & FEES	$ 1.00	Ccss Membership Fee Shortage
Aug-25	58	1 -03-11-1009-5695 SOFTWARE	$ 2,900.00	Online Textbooks-Math Xl
Aug-25	58	1 -03-11-1009-5641 TEXTS & DIGITAL RESOURCES	$ (2,900.00)	Online Textbooks-Math Xl
Aug-25	74	1 -02-11-1013-5611 INSTRUCTIONAL SUPPLIES	$ (12.00)	Kahoot
Aug-25	74	1 -02-14-2350-5695 SOFTWARE	$ 12.00	Kahoot
Aug-25	98	1 -05-13-2213-5611 INSTRUCTIONAL SUPPLIES	$ (87.00)	Birth Cert Translation
Aug-25	98	1 -05-13-2213-5590 OTHER PURCHASED SERVICES	$ 87.00	Birth Cert Translation
SEPT				
Sep-25	13	1 -02-1-2220-5330 PROFESSIONAL & TECH SRVC	$ (1,050.00)	Replace Printhead Pstr Printer
Sep-25	13	1 -02-1-2220-5420 REPAIRS & MAINTENANCE	$ 1,050.00	Replace Printhead Pstr Printer
Sep-25	80	1 -01-11-1005-5611 INSTRUCTIONAL SUPPLIES	$ (59.00)	Cover Ncte Membership
Sep-25	80	1 -01-11-1005-55810 DUES & FEES	$ 59.00	Cover Ncte Membership
Sep-25	99	1 -04-12-1200-5330 PROFESSIONAL & TECH SRVC	$ 2,200.00	Sos Renewal Sy 2025-2026
Sep-25	99	1 -04-12-1203-5330 PROFESSIONAL & TECH SRVC	$ (2,200.00)	Sos Renewal Sy 2025-2026
Sep-25	102	1 -02-13-2220-5642 TEXTS & DIGITAL RESOURCES	$ (544.00)	Bookbreak Membership
Sep-25	102	1 -02-13-2220-5690 OTHER SUPPLIES	$ (544.00)	Bookbreak Membership
Sep-25	102	1 -02-13-2220-5330 PROFESSIONAL & TECH SRVC	$ 1,088.00	Bookbreak Membership
Sep-25	103	1 -01-13-2220-5611 INSTRUCTIONAL SUPPLIES	$ (38.00)	Bookbreak Membership
Sep-25	103	1 -01-13-2220-5330 PROFESSIONAL & TECH SRVC	$ 38.00	Bookbreak Membership
Sep-25	151	1 -02-13-2220-5642 TEXTS & DIGITAL RESOURCES	$ (185.00)	Conn. Lib. Assoc. Mem. Dues
Sep-25	151	1 -02-13-2220-5810 DUES & FEES	$ 185.00	Conn. Lib. Assoc. Mem. Dues
Sep-25	162	1 -02-13-2220-5810 DUES & FEES	$ (40.00)	Non Fiction Books For Mc
Sep-25	162	1 -02-13-2220-5690 OTHER SUPPLIES	$ (238.00)	Non Fiction Books For Mc
Sep-25	162	1 -02-13-2220-5642 TEXTS & DIGITAL RESOURCES	$ 278.00	Non Fiction Books For Mc
OCT				
Oct-25	4	1 -01-13-2400-5690 OTHER PURCH SERVICES	$ (1,150.00)	Remarkable Tablet
Oct-25	4	1 -01-13-2400-5731 EQUIPMENT REPLACEMENT	$ (550.00)	Remarkable Tablet
Oct-25	4	1 -01-14-2350-5732 TECHNOLOGY EQUIP REPLACE	$ 1,700.00	Remarkable Tablet
Oct-25	15	1 -04-12-2151-5330 PROFESSIONAL & TECH SRVC	$ (2,969.00)	Voag Transportation Costs
Oct-25	15	1 -05-14-2700-5512 TRANSPORTATION VOAG	$ 2,969.00	Voag Transportation Costs
Oct-25	16	1 -04-12-2151-5330 PROFESSIONAL & TECH SRVC	$ (1,501.00)	Eca Transportation Costs
Oct-25	16	1 -05-14-2700-5515 TRANSPORTATION ECA	$ 1,501.00	Eca Transportation Costs
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)	Pl Session Supplies
Nov-25	156	1 -05-13-2213-5590 OTHER PURCHASED SERVICES	$ 2,500.00	Pl 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)	Pl Facilitator Stipends
Dec-25	139	1 -05-13-2213-5111 CERTIFIED SALARIES	$ 2,850.00	Pl 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,EQUIPMENT	$ (21.00)	For Piano Tuning Needed
Jan-26	293	1 -03-11-1010-5420 REPAIRS,MAINTENANCE & CLEANING	$ 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)	Suppies For Nurses Office
Mar-26	4	1 -03-13-2130-5810 DUES & FEES	$ (100.00)	Suppies For Nurses Office
Mar-26	4	1 -03-13-2130-5690 OTHER SUPPLIES	$ 250.00	Suppies 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 IMPROVEMENT	$ (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 SUPPLIES	$ (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 & CLEANING	$ (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 & CLEANING	$ (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 SUPPLIES	$ (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 SUPPLIES	$ (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 & CLEANING	$ (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,EQUIPMENT	$ (779.00)	Music Instructional Supplies
Mar-26	381	1 -03-11-1010-5611 INSTRUCTIONAL SUPPLIES	$ 779.00	Music Instructional Supplies
Mar-26	384	1 -03-11-1010-5810 DUES & FEES	$ (480.00)	Instructional Supplies
Mar-26	384	1 -03-11-1010-5611 INSTRUCTIONAL SUPPLIES	$ 480.00	Instructional Supplies
Mar-26	385	1 -03-11-1010-5330 PROFESSIONAL & TECH SRVC	$ (1,000.00)	Instructional Supplies
Mar-26	385	1 -03-11-1010-5611 INSTRUCTIONAL SUPPLIES	$ 1,000.00	Instructional Supplies
Mar-26	394	1 -03-11-1015-5611 INSTRUCTIONAL SUPPLIES	$ (600.00)	Steam Day Supplies
Mar-26	394	1 -03-13-2400-5690 OTHER SUPPLIES	$ 600.00	Steam Day Supplies
Mar-26	397	1 -03-11-1011-5330 PROFESSIONAL & TECH SRVC	$ (242.44)	Instructional Supplies
Mar-26	397	1 -03-11-1011-5611 INSTRUCTIONAL SUPPLIES	$ 242.44	Instructional Supplies
Mar-26	398	1 -03-11-1011-5330 PROFESSIONAL & TECH SRVC	$ (1,000.00)	Amity Advocate Ft Transport
Mar-26	398	1 -03-14-2700-5510 PUPIL TRANSPORTATION	$ 1,000.00	Amity Advocate Ft Transport
Mar-26	413	1 -01-13-2400-5581 TRAVEL - CONFERENCES	$ (2,000.00)	Yr End Sup For Stepping Up Cer
Mar-26	413	1 -01-13-2400-5690 OTHER SUPPLIES	$ 2,000.00	Yr End Sup For Stepping Up Cer
Mar-26	414	1 -01-13-2400-5581 TRAVEL - CONFERENCES	$ (1,000.00)	Walkie Talkies
Mar-26	414	1 -01-13-2400-5731 EQUIPMENT - REPLACEMENT	$ 1,000.00	Walkie Talkies
Mar-26	416	1 -01-13-2400-5810 DUES & FEES	$ (350.00)	Replacemt Furniture/Classrooms
Mar-26	416	1 -01-13-2400-5731 EQUIPMENT - REPLACEMENT	$ 350.00	Replacemt Furniture/Classrooms
Apr-26				
Apr-26	11	1 -03-13-2400-5330 PROFESSIONAL & TECH SRVC	$ (1,500.00)	12-Month/Year Whiteboard-Admin
Apr-26	11	1 -03-13-2400-5731 EQUIPMENT - REPLACEMENT	$ 1,500.00	12-Month/Year Whiteboard-Admin
Apr-26	13	1 -03-13-2400-5730 EQUIPMENT - NEW	$ 284.95	Portable Standing Desks
Apr-26	13	1 -03-11-1009-5611 INSTRUCTIONAL SUPPLIES	$ (284.95)	Portable Standing Desks
Apr-26	16	1 -04-12-1206-5611 INSTRUCTIONAL SUPPLIES	$ (350.00)	Ata Unified Tournament
Apr-26	16	1 -04-12-1206-5690 OTHER SUPPLIES	$ 350.00	Ata Unified Tournament
Apr-26	22	1 -01-11-1010-5611 INSTRUCTIONAL SUPPLIES	$ (425.00)	Cd Player Replace Broken One
Apr-26	22	1 -01-11-1010-5731 EQUIPMENT - REPLACEMENT	$ 425.00	Cd Player Replace Broken One

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

MONTH/YR	JNL#	ACCOUNT NUMBER & DESCRIPTION	AMOUNT	DESCRIPTION
Apr-26	23	1 -03-11-1011-5330 PROFESSIONAL & TECH SRVC	$ (641.61)	Instructional Supplies
Apr-26	23	1 -03-11-1011-5611 INSTRUCTIONAL SUPPLIES	$ 641.61	Instructional Supplies
Apr-26	80	1 -01-13-2400-5580 STAFF TRAVEL	$ (259.00)	Btc Conference For S.S.
Apr-26	80	1 -01-13-2400-5581 TRAVEL - CONFERENCES	$ 259.00	Btc Conference For S.S.
Apr-26	81	1 -01-13-2400-5420 REPAIRS,MAINTENANCE & CLEANING	$ (1,450.00)	Walkie Talkies Replacement
Apr-26	81	1 -01-13-2400-5330 PROFESSIONAL & TECH SRVC	$ (1,403.00)	Walkie Talkies Replacement
Apr-26	81	1 -01-13-2400-5731 EQUIPMENT - REPLACEMENT	$ 2,853.00	Walkie Talkies Replacement
Apr-26	98	1 -01-11-1010-5330 PROFESSIONAL & TECH SRVC	$ (835.00)	Spring Concert Supplies
Apr-26	98	1 -01-11-1010-5611 INSTRUCTIONAL SUPPLIES	$ 835.00	Spring Concert Supplies
Apr-26	99	1 -04-12-2151-5330 PROFESSIONAL & TECH SRVC	$ (750.00)	Virtual Learning Educere
Apr-26	99	1 -04-12-1200-5330 PROFESSIONAL & TECH SRVC	$ 750.00	Virtual Learning Educere
Apr-26	123	1 -01-13-2400-5581 TRAVEL - CONFERENCES	$ (2.00)	Transp. - Science/Uconn Trip
Apr-26	123	1 -01-11-1013-5510 PUPIL TRANSPORTATION	$ 2.00	Transp. - Science/Uconn Trip
Apr-26	126	1 -04-13-2110-5810 DUES & FEES	$ (46.00)	Transfer To Supply Line
Apr-26	126	1 -04-13-2110-5690 OTHER SUPPLIES	$ 46.00	Transfer To Supply Line
Apr-26	250	1 -04-13-2110-5810 DUES & FEES	$ 334.00	Transfer To Travel/Conf Line
Apr-26	250	1 -04-13-2140-5810 DUES & FEES	$ 75.49	Transfer To Travel/Conf Line
Apr-26	250	1 -04-12-2150-5581 TRAVEL - CONFERENCES	$ 409.49	Transfer To Travel/Conf Line
Apr-26	251	1 -04-12-1207-5330 PROFESSIONAL & TECH SRVC	$ 1,174.37	Transfer To Travel/Conf Line
Apr-26	251	1 -04-13-2190-5581 TRAVEL - CONFERENCES	$ 1,174.37	Transfer To Travel/Conf Line
May-26				
May-26	4	1 -05-13-2213-5581 TRAVEL - CONFERENCES	$ (1,000.00)	Retirement Gift & Pl Books
May-26	4	1 -05-13-2213-5690 OTHER SUPPLIES	$ 1,000.00	Retirement Gift & Pl Books
May-26	7	1 -05-13-2213-5581 TRAVEL - CONFERENCES	$ (1,889.00)	Team Mentor Stipends
May-26	7	1 -05-13-2213-5111 CERTIFIED SALARIES	$ 1,889.00	Team Mentor Stipends
May-26	15	1 -04-12-6130-5560 TUITION EXPENSE	$ (1,800.00)	New Conference Table
May-26	15	1 -04-13-2190-5731 EQUIPMENT - REPLACEMENT	$ 1,800.00	New Conference Table
May-26	45	1 -04-13-2140-5810 DUES & FEES	$ (47.97)	Protocols
May-26	45	1 -04-12-2350-5695 TECHNOLOGY SUPPLIES	$ 47.97	Protocols
May-26	45	1 -04-12-1208-5330 PROFESSIONAL & TECH SRVC	$ (452.03)	Protocols
May-26	45	1 -04-12-2350-5695 TECHNOLOGY SUPPLIES	$ 452.03	Protocols
May-26	56	1 -04-12-6110-5560 TUITION EXPENSE	$ (2,750.00)	Voag Tuition
May-26	56	1 -04-12-6111-5560 TUITION EXPENSE	$ 2,750.00	Voag Tuition
May-26	87	1 -02-14-2600-5420 REPAIRS,MAINTENANCE & CLEANING	$ (2,900.00)	Install Thermal Insulation
May-26	87	1 -02-14-2600-5715 IMPROVEMENTS TO BUILDINGS	$ 2,900.00	Install Thermal Insulation
May-26	91	1 -02-14-2219-5611 INSTRUCTIONAL SUPPLIES	$ (644.00)	To Purchase Workbench For Tech
May-26	91	1 -02-13-2400-5330 PROFESSIONAL & TECH SRVC	$ (140.00)	To Purchase Workbench For Tech
May-26	91	1 -02-13-2400-5731 EQUIPMENT - REPLACEMENT	$ 784.00	To Purchase Workbench For Tech
May-26	211	1 -03-14-2219-5611 INSTRUCTIONAL SUPPLIES	$ (1,195.00)	Cte Tools/Shed
May-26	211	1 -03-11-1008-5611 INSTRUCTIONAL SUPPLIES	$ 1,195.00	Cte Tools/Shed
Jun-26				
Jun-26	10	1 -02-13-2400-5330 PROFESSIONAL & TECH SRVC	$ (1,500.00)	TO PURCHASE REFRIGERATOR
Jun-26	10	1 -02-13-2400-5731 EQUIPMENT - REPLACEMENT	$ 1,500.00	TO PURCHASE REFRIGERATOR
Jun-26	30	1 -05-14-2350-5695 TECHNOLOGY SUPPLIES	$ (1,200.00)	staff travel
Jun-26	30	1 -05-14-2350-5581 TRAVEL - CONFERENCES	$ 1,200.00	staff travel
Jun-26	35	1 -05-14-2600-5720 IMPROVEMENTS TO SITES	$ (2,600.00)	Correct JE May 273
Jun-26	35	1 -03-14-2600-5720 IMPROVEMENTS TO SITES	$ 2,600.00	Correct JE May 273
Jun-26	46	1 -02-14-2600-5420 REPAIRS,MAINTENANCE & CLEANING	$ (2,654.05)	H.S. ART ROOM UPGRADES
Jun-26	46	1 -03-14-2600-5715 IMPROVEMENTS TO BUILDINGS	$ 2,654.05	H.S. ART ROOM UPGRADES
Jun-26	96	1 -01-11-3202-5330 PROFESSIONAL & TECH SRVC	$ (2,269.00)	Athletic Transportation-AMSO
Jun-26	96	1 -02-11-3202-5510 PUPIL TRANSPORTATION	$ 2,269.00	Athletic Transportation-AMSO
Jun-26	584	1 -03-13-2400-5111 CERTIFIED SALARIES	$ 167,942.00	EOY FY26 Budget Transfer
Jun-26	584	1 -03-14-2600-5410 UTILITIES, EXCLUDING HEAT	$ 157,805.00	EOY FY26 Budget Transfer
Jun-26	584	1 -05-15-1026-5111 CERTIFIED SALARIES	$ 112,299.00	EOY FY26 Budget Transfer
Jun-26	584	1 -03-13-2120-5111 CERTIFIED SALARIES	$ 86,677.00	EOY FY26 Budget Transfer
Jun-26	584	1 -03-14-2600-5621 NATURAL GAS	$ 79,164.00	EOY FY26 Budget Transfer
Jun-26	584	1 -05-14-2310-5330 PROFESSIONAL & TECH SRVC	$ 71,058.00	EOY FY26 Budget Transfer
Jun-26	584	1 -02-14-2600-5410 UTILITIES, EXCLUDING HEAT	$ 61,247.00	EOY FY26 Budget Transfer
Jun-26	584	1 -05-15-2512-5281 DEFINED CONTRIB RETIRE PLAN	$ 53,728.00	EOY FY26 Budget Transfer
Jun-26	584	1 -01-14-2600-5410 UTILITIES, EXCLUDING HEAT	$ 51,411.00	EOY FY26 Budget Transfer
Jun-26	584	1 -01-14-2600-5112 CLASSIFIED SALARIES	$ 34,858.00	EOY FY26 Budget Transfer

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

MONTH/YR	JNL#	ACCOUNT NUMBER & DESCRIPTION	AMOUNT	DESCRIPTION
Jun-26	584	1 -03-14-2600-5112 CLASSIFIED SALARIES	$ 31,841.00	EOY FY26 Budget Transfer
Jun-26	584	1 -01-13-2400-5112 CLASSIFIED SALARIES	$ 21,739.00	EOY FY26 Budget Transfer
Jun-26	584	1 -02-14-2600-5112 CLASSIFIED SALARIES	$ 19,834.00	EOY FY26 Budget Transfer
Jun-26	584	1 -03-15-2601-5111 CERTIFIED SALARIES	$ 16,852.00	EOY FY26 Budget Transfer
Jun-26	584	1 -02-13-2400-5112 CLASSIFIED SALARIES	$ 9,152.00	EOY FY26 Budget Transfer
Jun-26	584	1 -01-14-2600-5620 OIL USED FOR HEATING	$ 6,461.00	EOY FY26 Budget Transfer
Jun-26	584	1 -01-11-3201-5111 CERTIFIED SALARIES	$ 4,049.00	EOY FY26 Budget Transfer
Jun-26	584	1 -01-13-2120-5111 CERTIFIED SALARIES	$ 3,906.00	EOY FY26 Budget Transfer
Jun-26	584	1 -03-11-3202-5112 CLASSIFIED SALARIES	$ 3,464.00	EOY FY26 Budget Transfer
Jun-26	584	1 -05-14-2350-5420 REPAIRS,MAINTENANCE & CLEANING	$ 3,223.00	EOY FY26 Budget Transfer
Jun-26	584	1 -03-13-2140-5111 CERTIFIED SALARIES	$ 3,041.00	EOY FY26 Budget Transfer
Jun-26	584	1 -05-14-2320-5690 OTHER SUPPLIES	$ 2,870.00	EOY FY26 Budget Transfer
Jun-26	584	1 -02-13-2120-5111 CERTIFIED SALARIES	$ 2,772.00	EOY FY26 Budget Transfer
Jun-26	584	1 -05-14-2320-5112 CLASSIFIED SALARIES	$ 2,556.00	EOY FY26 Budget Transfer
Jun-26	584	1 -04-15-1204-5111 CERTIFIED SALARIES	$ 2,499.00	EOY FY26 Budget Transfer
Jun-26	584	1 -02-11-1014-5111 CERTIFIED SALARIES	$ 2,330.00	EOY FY26 Budget Transfer
Jun-26	584	1 -01-13-2220-5112 CLASSIFIED SALARIES	$ 2,144.00	EOY FY26 Budget Transfer
Jun-26	584	1 -03-14-2600-5613 MAINTENANCE/CUSTODIAL SUPPLIES	$ 2,120.00	EOY FY26 Budget Transfer
Jun-26	584	1 -02-13-2400-5111 CERTIFIED SALARIES	$ 2,097.00	EOY FY26 Budget Transfer
Jun-26	584	1 -05-14-2320-5111 CERTIFIED SALARIES	$ 2,094.00	EOY FY26 Budget Transfer
Jun-26	584	1 -02-13-2130-5112 CLASSIFIED SALARIES	$ 2,035.00	EOY FY26 Budget Transfer
Jun-26	584	1 -05-15-2512-5112 CLASSIFIED SALARIES	$ 1,713.00	EOY FY26 Budget Transfer
Jun-26	584	1 -02-11-3202-5510 PUPIL TRANSPORTATION	$ 1,639.00	EOY FY26 Budget Transfer
Jun-26	584	1 -05-14-2350-5111 CERTIFIED SALARIES	$ 1,606.00	EOY FY26 Budget Transfer
Jun-26	584	1 -02-13-2120-5112 CLASSIFIED SALARIES	$ 1,402.00	EOY FY26 Budget Transfer
Jun-26	584	1 -02-11-1006-5111 CERTIFIED SALARIES	$ 1,166.00	EOY FY26 Budget Transfer
Jun-26	584	1 -01-11-1014-5111 CERTIFIED SALARIES	$ 920.00	EOY FY26 Budget Transfer
Jun-26	584	1 -01-13-2400-5580 STAFF TRAVEL	$ 815.00	EOY FY26 Budget Transfer
Jun-26	584	1 -02-13-2220-5112 CLASSIFIED SALARIES	$ 749.00	EOY FY26 Budget Transfer
Jun-26	584	1 -01-13-2120-5112 CLASSIFIED SALARIES	$ 669.00	EOY FY26 Budget Transfer
Jun-26	584	1 -02-13-2400-5580 STAFF TRAVEL	$ 647.00	EOY FY26 Budget Transfer
Jun-26	584	1 -03-11-3202-5810 DUES & FEES	$ 512.00	EOY FY26 Budget Transfer
Jun-26	584	1 -01-12-1200-5112 CLASSIFIED SALARIES	$ 399.00	EOY FY26 Budget Transfer
Jun-26	584	1 -03-11-3202-5510 PUPIL TRANSPORTATION	$ 392.00	EOY FY26 Budget Transfer
Jun-26	584	1 -04-13-2190-5580 STAFF TRAVEL	$ 254.00	EOY FY26 Budget Transfer
Jun-26	584	1 -03-11-1006-5111 CERTIFIED SALARIES	$ 228.00	EOY FY26 Budget Transfer
Jun-26	584	1 -01-13-2400-5330 PROFESSIONAL & TECH SRVC	$ 222.00	EOY FY26 Budget Transfer
Jun-26	584	1 -03-11-3202-5440 RENTALS-LAND,BLDG,EQUIPMENT	$ 204.00	EOY FY26 Budget Transfer
Jun-26	584	1 -02-13-2220-5642 LIBRARY BOOKS & PERIODICALS	$ 155.00	EOY FY26 Budget Transfer
Jun-26	584	1 -03-11-3202-5590 OTHER PURCHASED SERVICES	$ 127.00	EOY FY26 Budget Transfer
Jun-26	584	1 -02-11-1011-5111 CERTIFIED SALARIES	$ 103.00	EOY FY26 Budget Transfer
Jun-26	584	1 -02-13-2220-5111 CERTIFIED SALARIES	$ 89.00	EOY FY26 Budget Transfer
Jun-26	584	1 -02-12-2150-5111 CERTIFIED SALARIES	$ 79.00	EOY FY26 Budget Transfer
Jun-26	584	1 -03-11-1005-5111 CERTIFIED SALARIES	$ 69.00	EOY FY26 Budget Transfer
Jun-26	584	1 -03-11-1010-5731 EQUIPMENT - REPLACEMENT	$ 28.00	EOY FY26 Budget Transfer
Jun-26	584	1 -03-11-1015-5611 INSTRUCTIONAL SUPPLIES	$ 12.00	EOY FY26 Budget Transfer
Jun-26	584	1 -01-11-1007-5611 INSTRUCTIONAL SUPPLIES	$ 11.00	EOY FY26 Budget Transfer
Jun-26	584	1 -01-13-2220-5611 INSTRUCTIONAL SUPPLIES	$ 9.00	EOY FY26 Budget Transfer
Jun-26	584	1 -04-13-2140-5611 INSTRUCTIONAL SUPPLIES	$ 2.00	EOY FY26 Budget Transfer
Jun-26	584	1 -02-11-3202-5440 RENTALS-LAND,BLDG,EQUIPMENT	$ 2.00	EOY FY26 Budget Transfer
Jun-26	584	1 -04-12-1206-5580 STAFF TRAVEL	$ 1.00	EOY FY26 Budget Transfer
Jun-26	584	1 -04-13-2110-5611 INSTRUCTIONAL SUPPLIES	$ 1.00	EOY FY26 Budget Transfer
Jun-26	584	1 -04-12-6117-5560 TUITION EXPENSE	$ 1.00	EOY FY26 Budget Transfer
Jun-26	584	1 -05-15-4000-5910 REDEMPTION OF PRINCIPAL	$ 1.00	EOY FY26 Budget Transfer
Jun-26	584	1 -03-12-2150-5111 CERTIFIED SALARIES	$ 1.00	EOY FY26 Budget Transfer
Jun-26	584	1 -01-11-1010-5111 CERTIFIED SALARIES	$ 1.00	EOY FY26 Budget Transfer
Jun-26	584	1 -04-13-2140-5810 DUES & FEES	$ 1.00	EOY FY26 Budget Transfer
Jun-26	584	1 -05-14-2600-5715 IMPROVEMENTS TO BUILDINGS	$ (47,931.00)	EOY FY26 Budget Transfer
Jun-26	584	1 -05-15-0000-5850 CONTINGENCY	$ (20,075.00)	EOY FY26 Budget Transfer
Jun-26	584	1 -04-12-6116-5510 PUPIL TRANSPORTATION	$ (55,928.00)	EOY FY26 Budget Transfer
Jun-26	584	1 -03-11-1009-5111 CERTIFIED SALARIES	$ (56,186.00)	EOY FY26 Budget Transfer

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

MONTH/YR	JNL#	ACCOUNT NUMBER & DESCRIPTION	AMOUNT	DESCRIPTION
Jun-26	584	1 -01-13-2220-5111 CERTIFIED SALARIES	$ (57,937.00)	EOY FY26 Budget Transfer
Jun-26	584	1 -05-14-2700-5627 TRANSPORTATION SUPPLIES	$ (58,774.00)	EOY FY26 Budget Transfer
Jun-26	584	1 -03-11-1027-5111 CERTIFIED SALARIES	$ (59,607.00)	EOY FY26 Budget Transfer
Jun-26	584	1 -03-11-1014-5111 CERTIFIED SALARIES	$ (61,315.00)	EOY FY26 Budget Transfer
Jun-26	584	1 -03-11-1013-5111 CERTIFIED SALARIES	$ (62,875.00)	EOY FY26 Budget Transfer
Jun-26	584	1 -04-12-6110-5560 TUITION EXPENSE	$ (74,101.00)	EOY FY26 Budget Transfer
Jun-26	584	1 -05-14-2600-5112 CLASSIFIED SALARIES	$ (79,742.00)	EOY FY26 Budget Transfer
Jun-26	584	1 -04-12-1203-5112 CLASSIFIED SALARIES	$ (85,246.00)	EOY FY26 Budget Transfer
Jun-26	584	1 -03-13-2120-5112 CLASSIFIED SALARIES	$ (93,083.00)	EOY FY26 Budget Transfer
Jun-26	584	1 -05-15-0000-5112 CLASSIFIED SALARIES	$ (97,131.00)	EOY FY26 Budget Transfer
Jun-26	584	1 -03-11-3202-5111 CERTIFIED SALARIES	$ (127,567.00)	EOY FY26 Budget Transfer

Amity Regional School District No. 5 - Budget Transfers 2026-2027

MONTH/YR	JNL#	ACCOUNT NUMBER & DESCRIPTION	AMOUNT	DESCRIPTION
JUL				
Jul-26	39	1 -05-14-2600-5330 PROFESSIONAL & TECH SRVC	$ (1,170.00)	Fmx Subscription Fee
Jul-26	39	1 -05-14-2660-5695 TECHNOLOGY SUPPLIES	$ 1,170.00	Fmx Subscription Fee
Jul-26	65	1 -03-11-3202-5330 PROFESSIONAL & TECH SRVC	$ (761.40)	Final Forms
Jul-26	65	1 -05-14-2350-5695 TECHNOLOGY SUPPLIES	$ 761.40	Final Forms
Jul-26	81	1 -05-14-2660-5690 OTHER SUPPLIES	$ (2,190.00)	Fmx Utility Manager Fee
Jul-26	81	1 -05-14-2660-5695 TECHNOLOGY SUPPLIES	$ 2,190.00	Fmx Utility Manager Fee
AUG				
Aug-26	8	1 -01-13-2400-5440 RENTALS-LAND,BLDG,EQUIPMENT	$ (326.00)	Purchase French Books
Aug-26	8	1 -01-11-1006-5641 TEXTBOOKS	$ 326.00	Purchase French Books
Aug-26	12	1 -02-14-2219-5611 INSTRUCTIONAL SUPPLIES	$ (326.00)	French Textbooks
Aug-26	12	1 -02-11-1006-5641 TEXTBOOKS	$ 326.00	French Textbooks

Students

Conduct and Discipline

The Amity Board of Education supports a positive and safe learning environment where each students' academic potential can be achieved. Students have a role in creating a positive and safe environment by treating others with respect and promoting kindness. Students are expected to adhere to the policies regarding conduct and discipline established by the Board for all students in all public schools of the District.

Areas of Responsibility

Board of Education – The Amity Regional School District No. 5 (ARSD/District) Board of Education (Board) holds the certified personnel responsible for the proper conduct and control of students while legally under the supervision and jurisdiction of the school.

Principals – The Principals and their designees implement necessary procedures and rules and regulations to render effective the policies of the Board of Education relating to standards of student behavior. The Principal may involve representatives of all areas of school personnel, students, parents, and citizens of the community.

Teachers – Teachers are responsible for the instruction of students in rules and regulations of proper conduct, as well as be responsible for proper and adequate control of students. The responsibility and authority of any teacher extends to all students of the school district under the assigned supervision of the teacher and to other students so situated with respect to the teacher as to be subject to the teacher's control.

Support Staff - Support staff are responsible for reporting to teachers and administrators, any inappropriate student behavior, to preserve their personal safety, the safety of other students and/or staff, and to safeguard District property as well as to preserve the orderly operation of school.

Parents – Parents are expected to cooperate with school authorities regarding the behavior of their children. Parents shall be held responsible for the willful misbehavior of their children.

Students - Students are expected to comply with school rules and regulations, as well as Board policies and administrative regulations. Students who fail to comply are subject to disciplinary action including, but not limited to, suspension and expulsion.

I. Definitions

A. **Exclusion** means any denial of public-school privileges to a student for disciplinary purposes.

B. **Emergency** means a situation in which the continued presence of the student in school poses such a danger to persons or property or a disruption of the educational process that a hearing may be delayed until a time as soon after the exclusion of such student as possible.

Students

Conduct and Discipline

C. **School-Sponsored Activity** means any activity sponsored, recognized or authorized by the Board and includes activities conducted on or off school property.

D. **Removal** is the exclusion of a student for a class period of ninety minutes or less.

E. **In-School Suspension** means an exclusion from regular classroom activity for no more than ten (10) consecutive school days, but not exclusion from school, provided such exclusion shall not extend beyond the end of the school year in which such in-school suspension was imposed. No student shall be placed on in-school suspension more than fifteen (15) times or a total of fifty (50) days in one school year, whichever results in fewer days of exclusion.

F. **Suspension (also referred as Out-of-School Suspension or Bus Suspension)** means the exclusion of a student from school and/or transportation services for not more than ten (10) consecutive school days, provided such suspension shall not extend beyond the end of the school year in which such suspension is imposed; and further provided no student shall be suspended more than ten (10) times or a total of fifty (50) days in one school year, whichever results in fewer days of exclusion, unless such student is granted a formal hearing as provided below.

All suspensions shall be in-school suspensions unless the administration determines for any student enrolled in grades three through twelve, inclusive, that (1) the student being suspended poses such a danger to persons or property or such a disruption of the educational process that the student shall be excluded from school during the period of suspension or (2) that an out-of-school suspension is appropriate based on evidence of previous disciplinary problems that have led to suspensions or expulsion of the student and efforts by the administration to address such disciplinary problems through means other than out-of-school suspension or expulsion, including positive support strategies.

G. **Expulsion** means the exclusion of a student, grades three to twelve inclusive, from school privileges for more than ten (10) consecutive school days. The expulsion period may not extend beyond one calendar year.

H. **Dangerous Instrument** means any instrument, article, or substance which, under the circumstances in which it is used or attempted or threatened to be used, is capable of causing death or serious physical injury, and includes a “vehicle.”

I. **Deadly Weapon** means any weapon, whether loaded or unloaded, from which a shot may be discharged, or a switchblade knife, gravity knife, billy, blackjack, bludgeon or metal knuckles. It may also include pellet guns and/or air soft pistols.

J. **Firearm**, as defined in 18 U.S.C. §921, means a) any weapon (including a starter gun) that will, is designed to, or may be readily converted to expel a projectile by the action of an explosive, b) the frame or receiver of any such weapon, c) a firearm muffler or silencer, or d) any destructive device. (A firearm; currently defined by 18 U.S.C. 921, is any weapon that can expel a projectile by an explosive action and includes explosive devices, incendiaries, poison gases, and firearm frames, receivers, mufflers, or silencers.) A firearm, as defined by C.G.S. 53a-3 includes any sawed-off shotgun, machine gun, rifle, shotgun, pistol, revolver, or other weapon, whether loaded or unloaded from which a shot may be discharged. The term firearm does not include an antique firearm.

K. **Destructive device** includes any explosive, incendiary, or poisonous gas device, including a bomb, a grenade, a rocket having a propellant charge of more than four ounces, a missile having an explosive or incendiary charge of more than one-quarter ounce, a mine, or any other similar device; or any weapon (other than a shotgun or shotgun shell which the Attorney General finds is generally recognized as particularly suited for sporting purposes) that will, or may be readily converted to, expel a projectile by explosive or other propellant, and which has a barrel with a bore of more than ½" in diameter. The term "destructive device" also includes any combination of parts either designed or intended for use in converting any device into any destructive device and from which a destructive device may be readily assembled. A “destructive device” does not include an antique firearm; a rifle intended to be used by the owner solely for sporting, recreational, or cultural purposes; or any device which is neither designed nor redesigned for use as a weapon.

L. **Martial Arts Weapon** means a nunchaku, kama, kasari-fundo, octagon sai, tonfa, or Chinese star.

M. **Weapon** means any BB gun, any blackjack, any metal or brass knuckles, any police baton or nightstick, any dirk knife or switch knife, any knife having an automatic spring release device by which a blade is released from the handle, having a blade of over one and one-half inches (1½”) in length, any stiletto, any knife the edged portion of the blade of which is four (4) inches and over in length, any martial arts weapon or electronic defense weapon, or any other dangerous or deadly weapon or instrument, unless permitted by law under Connecticut General Statute § 29-38.

N. **Hazing** means any action which recklessly or intentionally endangers the health or safety of a person for the purpose of initiation, admission into or affiliation with, or as a condition for continued membership in a student organization.

O. **School Days** shall mean days when school is in session for students.

P. **Seriously Disruptive of the Educational Process** means any conduct that markedly interrupts or severely impedes the day-to-day operation of a school.

Q. **Alternate education** means a school or program maintained and operated by the Board of Education that is offered to students in a nontraditional setting and addresses their social, emotional, behavioral, and academic needs. Such program must conform to SBE guidelines and conform to C.G.S. 10-15 and 16 (180 days/900 hours).

II. Scope of the Student Discipline Policy

A. Conduct on School Grounds or at a School-Sponsored Activity

Students will be disciplined for conduct on school grounds or at any school-sponsored activity that endangers persons or property, is seriously disruptive of the educational process, or that violates a publicized policy of the Board.

B. Conduct off School Grounds

1. Students will be disciplined for conduct off school grounds if such conduct is seriously disruptive of the educational process and violative of a publicized policy of the Board. In making a determination as to whether such conduct is seriously disruptive of the educational process, the Administration and the Board of Education may consider, but shall not be limited to the following factors: (1) whether the incident occurred within close proximity of a school; (2) whether other students from the school were involved or whether there was any gang involvement; (3) whether the conduct involved violence, threats of violence, or the unlawful use of a weapon, as defined in section C.G.S. § 29-38, and whether any injuries occurred; and (4) whether the conduct involved the use of alcohol. The Administration and/or the Board of Education may also consider whether such off-campus conduct involved the use of drugs.

2. Students are subject to suspension or expulsion for conduct off school property and outside of school-sponsored activities in accordance with law, for conduct that violates a publicized policy of the Board and is seriously disruptive of the educational process, including but not limited to the following:

   Conduct leading to a violation of any federal or Connecticut state law that indicates that the student presents a danger to any person in the school community or school property and/or the conduct resulted in an arrest. Adjudication as a delinquent or a youthful offender as the result of a felony if the conduct leading to the adjudication is determined to pose a danger to the student themself, other students, school employees or school property.

III. Actions Leading to Disciplinary Action, including Suspension and/or Expulsion

Conduct which leads to disciplinary action (including but not limited to suspension and/or expulsion) includes conduct on school grounds or at a school-sponsored activity, and conduct off school grounds, as set forth above. Conduct includes, but is not limited to, the following:

1. Possession of any weapon, weapon facsimile, deadly weapon, pistol, knife, blackjack,

bludgeon, box cutter, metal knuckles, pellet gun, explosive device, firearm, whether loaded or unloaded, whether functional or not, or any other dangerous object. This also includes pellet guns and/or air soft pistols.

2. Unauthorized possession, sale, distribution, use or consumption of tobacco, drugs, narcotics or alcoholic beverages. For the purposes of this Paragraph 2, the term “drugs” shall include, but shall not be limited to, any medicinal preparation (prescription and non-prescription) and any controlled substance whose possession, sale, distribution, use or consumption is illegal under state and/or federal law.

3. Possession of paraphernalia used or designed to be used in the consumption, sale or distribution of drugs, alcohol or tobacco, as described in subparagraph (2) above.

4. Striking or assaulting a student, members of the school staff or other persons.

5. Threatening in any manner any member of the school community, including any teacher, a member of the school administration, any other employee, or a fellow student, including, but not limited to, threats made orally, in writing, or via electronic communication.

6. Blackmailing, threatening or intimidating school staff or students.

7. Any act of harassment that is based on, inclusive of, but not limited to, an individual’s race, religion, color, disability, national origin, ancestry, ethnic background, gender, sexual orientation, gender identity or expression, or socioeconomic status or membership in any other protected class.

8. Bullying on school grounds; at a school-sponsored or school-related activity, function, or program; at a school bus stop; on a school bus or other vehicle owned, leased, or used by the Board; or through the use of an electronic device or an electronic mobile device owned, leased, or used by the Board.

9. Bullying outside of the school setting if it creates a hostile environment at school for the victim, infringes on the rights of the victim at school, or substantially disrupts the education process or orderly operation of a school.

10. Use of artificial intelligence tools to create or distribute content that harasses, threatens, intimidates, or harms another individual, including but not limited to altered images, synthetic media, or impersonations.

11. Engaging in teen dating violence, defined as any act of physical, emotional or sexual abuse, including stalking, harassing and threatening, that occurs between two students who are currently in or who have been in a dating relationship.

Students

Conduct and Discipline

12. Hazing.

13. Theft.

14. The destruction of real, personal or school property such as, cutting, defacing or otherwise damaging property in any way.

15. Possession or ignition of any fireworks or other explosive materials, or ignition of any material causing a fire.

16. Unauthorized and/or reckless and/or improper operation of a motor vehicle on school grounds or at any school-sponsored activity.

17. Leaving school grounds, school transportation vehicle or a school-sponsored activity without authorization.

18. A walk-out from or sit-in within a classroom or school building or school grounds. At the discretion of school administration, student protest activities may be permitted if such activities are planned to be minimally disruptive to the educational environment.

19. Use of or copying of the academic work of another individual and presenting it as the student's own work, without proper attribution.

20. Use of artificial intelligence tools to generate or substantially complete academic work and presenting such work as one's own without permission or proper attribution, in violation of District expectations for academic integrity.

21. Making an untrue statement of fact about a staff member or member of the school community with malice or reckless disregard for the truth.

22. Use of artificial intelligence to create, alter, or distribute false or misleading content, including images, audio, or video, that misrepresents individuals or events.

23. The possession and/or display of obscenity or pornographic images or the unauthorized or inappropriate possession and/or display of images, pictures, or photographs depicting nudity on school property or at a school-sponsored activity.

24. Inappropriate displays of public affection of a sexual nature and/or sexual activity on school grounds or at a school-sponsored activity.

25. Possession and/or use of a radio, walkman, beeper, paging device, cellular telephone, walkie-talkie or similar electronic device on school grounds or at a school-sponsored

activity in a manner that is not in accordance with the District Technology and District Acceptable Use policies.

26. Using computer systems, including email, instant messaging, text messaging, blogging or the use of social media, or other forms of electronic communications, to engage in any conduct prohibited by this policy.

27. Engaging in a plan to stage or create a violent situation for the purposes of recording it by photographing, audio, or video; or recording by photographic audio, or video acts of violence for purposes of later publication**.** Engaging in a plan to stage sexual activity for the purposes of recording it by photographing, audio, or video; or recording by photographing, audio, or video sexual acts for purposes of later publication.

28. Unauthorized use of or tampering with any school computer, computer system, computer software, Internet connection or similar school property or system, or the use of such property or system for inappropriate purposes.

29. Unauthorized use of artificial intelligence tools or platforms that have not been approved by the District or use of artificial intelligence tools to bypass school safeguards, filtering systems, or monitoring protocols.

30. Violation of the District's "Acceptable Use Agreement/Internet Use" for the applicable grade level.

31. Any misuse of artificial intelligence tools or technologies that violates District policies, disrupts the educational environment, infringes on the rights of others, or is inconsistent with expectations for responsible use.

32. Possession and/or use of a laser pointer.

33. Lying, misleading or being deceitful to a school employee or person having authority over the student during any school investigation including knowingly making a false written statement or the filing of a false complaint.

34. Use of artificial intelligence to generate, possess, or distribute inappropriate, obscene, or sexually explicit content, including artificially generated or altered images of individuals.

35. Refusal to obey redirection by a member of the school staff or law enforcement authorities for disruptive classroom behavior.

36. Defiance of school rules and the valid authority of teachers, supervisors,

administrators, other staff members and/or law enforcement authorities.

37. Refusal by a student to identify themself to a staff member when asked.

38. Violation of smoking; dress; transportation regulations, or other regulations and/or policies governing student conduct.

39. The use of obscene or profane language or gestures.

40. Unauthorized entrance into any school facility or portion of a school facility or aiding or abetting an unauthorized entrance.

41. Trespassing on school grounds while on out-of-school suspension or expulsion.

42. Throwing snowballs, rocks, sticks and/or similar objects.

43. Accumulation of offenses such as school and class tardiness, class or study hall or failure to attend detention.

44. Any other violation of school rules or regulations or a series of violations which makes the presence of the student in school seriously disruptive of the educational process and/or a danger to persons or property.

45. Any action prohibited by any Federal or State law which would indicate that the student presents a danger to any person in the school community or school property.

IV. Progressive Discipline

Through progressive discipline, principal/designee determines appropriate consequences and/or support to help students improve their behavior, while taking into account the details of each individual circumstance. The goal of all discipline is to teach students why the behavior is inappropriate and to prevent inappropriate student behavior from happening again. Providing students with the opportunity to reflect on their own actions and the impact of these actions is essential to student learning. The following may be taken into consideration when employing progressive discipline:

1. The student’s age, grade level, stage of social development, and /or special education needs;
2. The nature and severity of the misbehavior;
3. The impact of the misbehavior on the learning environment and school climate; and
4. Prior referrals for inappropriate behavior.

Within this context, more serious consequences may be considered for inappropriate behavior that escalates or is repeated.

The principal/designee shall consider a range of options to determine the consequences for each situation and to help the student learn from their choices. Possible consequences include, but are not limited to:

1. A conversation with student and/or student's parent/guardian;
2. A review of expectations for student's behavior;
3. Restorative conversations and actions;
4. Recommendation for counseling support;
5. After school detention;
6. Saturday School detention;
7. Loss of privileges (i.e., extracurricular participation, field trips, parking);
8. Suspension or expulsion; and/or
9. A consequence that fits the student's misbehavior.

Each decision on discipline is unique for each student, as it will depend upon the strengths and challenges of the student and the circumstances of the misbehavior. Parent/guardian notification for consequences 1 through 3 (as noted above) is at the discretion of the administrator addressing the violation. Parent notification will be provided for consequences 4 through 9 (as noted above). Notification is generally provided in the form of a phone call, a letter, or an electronic communication which state the nature of the violation and the consequence.

V. Procedures Governing Removal

A. All teachers are hereby authorized to remove a student from class when such student causes a serious disruption of the educational process within the classroom.

B. Such teacher shall send the student to a designated area and shall immediately inform the building Principal or their designee as to the name of the student and the reason for removal.

C. No student shall be removed from class more than six (6) times in any year nor more than twice in one week, unless such student is referred to the Building Principal or their designee and granted an informal hearing in accordance with the provisions of this policy.

D. A school principal or other school administrator shall notify a parent or guardian of a student whose behavior has caused a serious disruption to the instruction of other students, caused self-harm or caused physical harm to a teacher, another student or other school employee not later than twenty-four hours after such behavior occurs. Such notice shall include, but not be limited to, informing such parent or guardian that the teacher of record in the classroom in which such behavior occurred may request a behavior intervention meeting.

Students

Conduct and Discipline

E. Any teacher of record in a classroom may request a behavior intervention meeting with the crisis intervention team for the school, for any student whose behavior has caused a serious disruption to the instruction of other students or caused self-harm or physical harm to such teacher or another student or staff member in such teacher's classroom. The crisis intervention team shall, upon the request of such teacher and notifying such student's parent or guardian, convene a behavior intervention meeting regarding such student. The participants of such behavior intervention meeting shall identify resources and support to address such student's social, emotional and instructional needs. Not later than seven days after the behavior intervention meeting, the crisis intervention team shall submit to the parent or guardian of such student, in the dominant language of such parent or guardian, a written summary of such meeting, including, but not limited to, the resources and supports identified.

VI. Procedures Governing Out-of-School Suspension

A. The Principal of a school, or designee on the administrative staff of the school, shall have the right to suspend out of school any student for breach of conduct as noted in Section III of this policy for not more than ten (10) consecutive school days.

All suspensions shall be in-school suspensions, except the Board of Education may authorize the administration of schools under its direction to impose an out-of-school suspension on any student if, resulting from a due process hearing:

1. The administration determines that the student being suspended poses such a danger to persons or property or such a disruption of the educational process that the student shall be excluded from school during the period of suspension;
2. The administration determines that an out-of-school suspension is appropriate for such student based on evidence of:

    a. Previous disciplinary problems that have led to suspensions or expulsion of such student, and

    b. Efforts by the administration to address such disciplinary problems through means other than out-of-school suspension or expulsion, including positive behavioral support strategies;

3. The administration determines that an out-of-school suspension is appropriate for such student based on evidence that such student's conduct on school grounds is behavior that causes physical harm;

4. Requires that such student receives services that are trauma-informed and developmentally appropriate and align with any behavioral intervention plan, individualized education program, or plan pursuant to Section 504 of the Rehabilitation Act of 1973, as amended from time to time, for such student upon

such student's return to school immediately following the out-of-school suspension; and

5. Considers whether to convene a planning and placement team meeting for the purposes of conducting an evaluation to determine whether such student may require special education or related services.

An out-of-school suspension shall not exceed ten school days.

B. In such cases, the following procedures shall be followed:

1. Unless an emergency situation exists, no student shall be suspended prior to having an informal hearing before the Principal or designee at which the student is informed of the charges and given an opportunity to respond. In the event of an emergency, the informal hearing shall be held as soon after the suspension as possible.

2. Evidence of past disciplinary problems which have led to removal from a classroom, suspension, or expulsion of a student who is the subject of an informal hearing may be received by the Principal, but only considered in the determination of the length of suspension.

3. By telephone, the Principal or designee shall notify the parent or guardian of a student and the Superintendent of Schools not later than 24 hours of the suspension following the suspension and state the cause(s) leading to the suspension.

4. Whether or not home contact is made with the parent or guardian of such student, the Principal or designee shall forward a letter promptly to such parent or guardian to the last address reported on school records (or to a newer address if known by the Principal or designee), offering the parent or guardian an opportunity for a conference to discuss same.

5. Notice of the original suspension shall be transmitted by the Principal or designee to the Superintendent of Schools or designee by the close of the school day following the commencement of the suspension, but not later than 24 hours after the commencement of the suspension.

6. The student shall be allowed to complete any classwork, including examinations, missed while under suspension, without penalty.

7. Notice of the suspension shall be recorded in the student's cumulative educational record. Such notice shall be expunged from the cumulative educational record by the Board if the student graduates from high school. For any student for whom a suspension has been waived or the length of suspension has been shorten pursuant to

number 9 below, the student's suspension shall be expunged from the cumulative education record if the student graduates from high school, or if the administration so chooses, at the time the student completes any administration-specified program and meets any other conditions required by the administration, whichever is earlier.

8. The decision of the Principal or designee with regard to disciplinary actions up to and including suspensions shall be final.

9. For any student who is suspended for the first time and who has never been expelled, the school administration may shorten the length of or waive the suspension period if the student successfully completes an administration- specified program and meets any other administration-required conditions. Such program shall be at no expense to the student or their parents/guardians.

B. In cases where the student has already been suspended, or such suspension will result in the student's being suspended, more than ten (10) times or fifty (50) days in a school year, whichever results in fewer days of exclusion, the student shall, prior to suspension, be granted a formal hearing before the Board of Education. The Principal or designee shall report the student to the Superintendent or designee and request a formal Board hearing.

C. The reassignment of a student from one regular education classroom in the district to another regular education classroom program in the school district shall not constitute a suspension or expulsion.

VII. Procedures Governing In-School Suspension

A. The Principal or designee may impose in-school suspension in cases where a student's conduct endangers persons or property, violates school policy, seriously disrupts the educational process or in other appropriate circumstances as determined by the Principal or designee. All suspensions shall be in-school suspensions unless the administration determines that for a student enrolled in grades three through twelve, inclusive, (1) the student being suspended poses such a danger to persons or property or such a disruption of the educational process that the student shall be excluded from school during the period of suspension or (2) that an out-of-school suspension is appropriate based on evidence of previous disciplinary problems that have led to suspensions or expulsion of the student and efforts by the administration to address such disciplinary problems through means other than out-of-school suspension or expulsion, including positive support strategies.

B. The Principal of a school, or designee on the administrative staff of the school, shall have the right to suspend any student in-school for breach of conduct as noted in Section III of this policy for not more than five (5) consecutive school days.

C. In-school suspension may not be imposed on a student without an informal hearing by the

Students

Conduct and Discipline

building Principal or designee.

D. In-school suspensions shall be served in the school attended by the student.

E. An in-school suspension may be served in the student's school or any school building under the jurisdiction of the local or regional board of education, as determined by such board.

F. No student shall be placed on in-school suspension more than fifteen (15) times or a total of fifty (50) days in one school year, whichever results in fewer days of exclusion.

VIII. Expulsion Recommendation Procedure

A. A Principal may consider recommendation or expulsion of a student enrolled in grades three through twelve, inclusive, in a case where they have reason to believe the student has engaged in conduct described at Sections IIA and IIB above.

B. A Principal must recommend expulsion proceedings in all cases against any student in grades kindergarten through grade twelve, inclusive, whom the administration has reason to believe:

1) The student, on grounds or at a school-sponsored activity, was in possession of a firearm, as defined in 18 U.S.C. 921*, as amended from time to time, or deadly weapon, dangerous instrument or martial arts weapon, as defined in C.G.S. 53A-3; or the student, off school grounds, did possess such firearm in violation of C.G.S. 29-35 or did possess and use such a firearm, instrument or weapon in the commission of a crime under chapter 952 of the Connecticut General Statutes; or the student, on or off school grounds offered for sale or distribution a controlled substance, as defined in subdivision (9) of C.G.S. 21a-240, whose manufacture, distribution, sale, prescription, dispensing, transporting or possessing with intent to sell or dispense, offering or administering is subject to criminal penalties und er C.G.S. 21-277 and 21a-278.

2) In keeping with C.G.S. §10-233d and the Gun Free Schools Act, such a student shall be expelled for one calendar year if the Board of Education or impartial hearing board finds that the student did so possess or so possess and use, as appropriate, such a weapon or firearm, instrument or weapon; or did so offer for sale or distribution such a controlled substance.

3) The Board may modify the period of a mandatory expulsion on a case-by-case basis.

4) A preschool student enrolled in a Board provided preschool program is subject to mandatory expulsion whenever there is reason to believe that the child was in possession of a firearm, as defined in 18 USC 921, as amended from time to time, on or off school grounds or at a preschool program-sponsored event. Such child shall be expelled for one calendar year if, at the expulsion hearing it is determined, that the

child did so possess such a firearm. The Board may modify the period of expulsion on a case-by-case basis.

C. Upon receipt of an expulsion recommendation, the Superintendent may conduct an inquiry concerning the expulsion recommendation.

   If the Superintendent or their designee determines that a student should or must be expelled, they shall forward their recommendation to the Board of Education so that the Board of Education can consider and act upon this recommendation.

IX. Expulsion Hearing Procedure

A. **Emergency Exception**

Except in an emergency situation, the Board of Education shall, prior to expelling the student, conduct a hearing to be governed by the procedures outlined herein. Whenever an emergency exists, the hearing provided for above shall be held as soon as possible after the expulsion.

B. **Hearing Panel**

1. Expulsion hearings conducted by the Board will be heard by any three or more Board members. A decision to expel a student must be supported by a majority of the Board members present, provided that no less than three affirmative votes to expel are cast.

2. Alternatively, the Board may appoint an impartial hearing board composed of one or more persons to hear and decide the expulsion matter, provided that no member of the Board may serve on such panel.

C. **Notice**

1. Written notice of the expulsion hearing must be given to the student, and, if the student is a minor to their parent(s) or guardian(s) at least five business days prior the time of the hearing, not including the day of such hearing.

2. The written notice of the expulsion hearing shall inform the student of the following:

   a) The date, time, and location of the hearing.

   b) A short, plain description of the conduct alleged by the administration.

   c) The student may present as evidence, testimony and documents concerning the conduct alleged and the appropriate length and conditions of expulsion, as well as notice that the expulsion hearing will be the student's sole opportunity to present such evidence.

d) The student may cross-examine witnesses called by the administration.

e) The student may be represented by any third party of their choice, including an attorney, at their expense or at the expense of their parents.

f) The notice shall include information concerning the parent/guardian and the student's legal rights regarding expulsion hearings and the legal services that are provided free of charge or at a reduced rate that are available locally (CT Legal Service or source of such services) and how to access such services. An attorney or other advocate may represent any student subject to expulsion proceedings. The student's parent/guardian shall have the right to have the expulsion hearing postponed for up to one week to allow time to obtain representation, except that if an emergency exists, such hearing shall be held as soon after the expulsion as possible.

g) A student is entitled to the services of a translator or interpreter, to be provided by the Board of Education, whenever the student or their parent(s) or guardian(s) do(es) not speak the English language or is disabled.

h) The conditions under which the Board is not legally required to give the student an alternative educational opportunity (if applicable).

D. **Hearing Procedures**

1. The hearing will be conducted by the Presiding Officer, who will call the meeting to order, introduce the parties, Board members and counsel, briefly explain the hearing procedures, and swear in any witnesses called by the administration or the student.

2. The hearing will be conducted in executive session. A verbatim record of the hearing will be made, either by tape recording or by a stenographer.

3. Formal rules of evidence will not be followed. The Board has the right to accept hearsay and other evidence if it deems that evidence relevant or material to its determination. The presiding officer will rule on testimony or evidence as to it being immaterial or irrelevant.

4. The hearing will be conducted in two parts. In the first part of the hearing, the Board will receive and consider evidence regarding the conduct alleged by the administration.

5. In the first part of the hearing, the charges will be introduced into the record by the Superintendent or their designee.

6. Each witness for the administration will be called and sworn. After a witness has finished testifying, they will be subject to cross-examination by the opposite party or their legal counsel and by Board members.

7. After the Administration has presented its case, the student will be asked if they have any witnesses or evidence to present. If so, the witnesses will be sworn, will testify, and will be subject to cross examination and to questioning by the Board. The student may also choose to make a statement at this time. If the student chooses to make a statement, they will be sworn and subject to cross examination and questioning by the Board. Concluding statements will be made by the administration and then by the student and/or their representative.

8. In cases where the respondent has denied the allegation, the Board must determine whether the respondent committed the offense(s) as charged by the Superintendent.

9. If the Board determines that the student has committed the conduct as alleged, then the Board shall proceed with the second portion of the hearing, during which the Board will receive and consider evidence regarding the length and conditions of expulsion.

10. When considering the length and conditions of expulsion, the Board may review the student's attendance, academic and past disciplinary records. The Superintendent will make a recommendation as to the discipline to be imposed.

11. Evidence of past disciplinary problems which have led to removal from a classroom, suspension or expulsion of a student being considered for expulsion may be considered only during the second portion of the hearing, during which the Board is considering length of expulsion and nature of alternative educational opportunity to be offered.

12. Where administrators presented the case in support of the charges against the student, such administrative staff shall not be present during the deliberations of the Board either on questions of evidence or on the final discipline to be imposed. The Superintendent may, after reviewing the incident with administrators, and reviewing the student's records, make a recommendation to the Board as to the appropriate discipline to be applied.

13. The Board shall make findings as to the truth of the charges, if the student has denied them, and, in all cases, the disciplinary action, if any, to be imposed. The Board shall report its final decision in writing to the student, or if such student is a minor, also to

the parent(s) or guardian(s), stating the reasons on which the decision is based, and the disciplinary action to be imposed. Said decision shall be based solely on evidence presented at the hearing.

14. For any student who is suspended for the first time and who has never been expelled, the school administration may shorten the length of or waive the suspension period if the student successfully completes an administration- specified program and meets any other administration-required conditions. Such program shall be at no expense to the student or their parents/guardians.

X. Alternative Educational Program for Expelled Students

A. **Students under sixteen (16) years of age:**

Whenever the Board of Education expels a student under sixteen years of age, it shall offer any such student an alternative educational program, which shall be (1) alternative education, as defined, by C.G.S. 10-74j or (2) in accordance with the standards adopted by the State Board of Education (SBE) with an individualized learning plan.

B. **Students sixteen (16) to eighteen (18) years of age:**

The Board of Education will provide an alternative education as defined or in accordance with SBE standards to a sixteen- to eighteen-year-old student expelled for the first time if they request it and if they agree to the conditions set by the Board of Education. The alternative education may include placement in an adult education program for students who are at least seventeens of age. Students participating in an adult education program during a period of expulsion shall not be required to withdraw from school prior to participation. The Board of Education is not required to offer an alternative program to any student between the ages of sixteen and eighteen who is expelled for the second time.

C. **Students eighteen (18) years of age or older:**

The Board of Education is not required to offer an alternative educational program to expelled students eighteen years of age or older.

D. **Students identified as eligible for services under the Individuals with Disabilities Education Act (IDEA):**

If the Board of Education expels a student who has been identified as eligible for services under the Individuals with Disabilities Education Act (“IDEA”), it shall offer an alternative educational program to such student in accordance with the requirements of IDEA, as it may be amended from time to time.

Students

Conduct and Discipline

XI. Notice of Student Expulsion on Cumulative Record

A. Notice of expulsion and the conduct for which the student was expelled shall be included on the students' cumulative educational record. Such notice, except for the notice of an expulsion of a student in grades 9 through 12 inclusive, based on possession of a firearm or deadly weapon, may be expunged from the cumulative educational record by the Board if the Board determines that the conduct and behavior of the student in the years following the expulsion warrants an expungement. Such notice shall be expunged from the cumulative educational record by the Board if the student graduates from high school.

B. If a student's expulsion is shortened or the expulsion period waived based upon the fact that the student was expelled for the first time, had never been suspended, and successfully completed a Board specified program and/or met other conditions required by the Board, the notice of expulsion shall be expunged from the cumulative educational record if the student graduates from high school or, if the Board so chooses, at the time the student completes the Board specified program and meets any other conditions required by the Board.

XII. Change of Residency During Expulsion Proceedings

A. **Student moving into the school district:**

1. If a student enrolls in the district while an expulsion hearing is pending in another district, such student shall not be excluded from school pending completion of the expulsion hearing unless an emergency exists, as defined above. The Board shall retain the authority to suspend the student and/or to conduct its own expulsion hearing.

2. Where a student enrolls in the district during the period of expulsion from another school district, the Board may adopt the decision of the student expulsion hearing conducted by such other school district. The Board shall make its determination based upon a hearing held by the Board which shall be limited to a determination of whether the conduct which was the basis of the expulsion would also warrant expulsion by the Board.

B. **Student moving out of the school district:**

Where a student withdraws from school after having been notified that an expulsion hearing is pending, but before a decision has been rendered by the Board, the notice of the pending expulsion hearing shall be included on the student's cumulative record and the Board shall complete the expulsion hearing and render a decision. If the Board subsequently renders a decision to expel the student, a notice of the expulsion shall be included on the student's cumulative record.

Students

Conduct and Discipline

XIII. Procedures Governing Suspension and Expulsion of Students Identified as Eligible for Services under the Individuals with Disabilities Education Act (IDEA)

A. **Suspension of IDEA students:**

Notwithstanding the foregoing, if the administration suspends a student identified as eligible for services under the IDEA, as reauthorized in 2004, (an "IDEA student") who has engaged in conduct that violated any rule or code of conduct of the school district that applies to all students, the following procedures shall apply:

1. The administration shall not later than the date on which the decision to take disciplinary action is made, notify the parents of the student of the decision to suspend and a copy of the special education procedural safeguards must either be hand delivered or sent by mail to the parents on the date that the decision to suspend was made.

2. During the period of suspension, the school district is not required to provide any educational services to the IDEA student beyond that which is provided to all students suspended by the school district.

B. **Expulsion and Suspensions that Constitute Changes in Placement for IDEA students:**

Notwithstanding any provision to the contrary, if the administration recommends for expulsion an IDEA student who has engaged in conduct that violated any rule or code of conduct of the school district that applies to all students, the procedures described in this section shall apply. The procedures described in this section shall also apply for students whom the administration has suspended in a manner that is considered under the IDEA, as it may be amended from time to time, to be a change in placement.

1. The parents of the student must be notified of the decision to suspend on the date on which the decision to suspend was made, and a copy of the special education procedural safeguards must either be hand-delivered or sent by mail to the parents on the date that the decision to suspend was made.

2. The school district shall immediately convene the IEP team, but in no case later than ten (10) school days after the recommendation for expulsion or the suspension which constitutes a change in placement was made. The relevant members of the student's IEP team shall consider the relationship between the student's disability and the behavior that led to the recommendation for expulsion or the suspension which constitutes a change in placement, in order to determine whether the student's behavior was a direct manifestation of their disability.

3. If the IEP team finds that the behavior was a direct manifestation of the student's

disability, the administration shall not proceed with the recommendation for expulsion. The IEP team shall consider the student's misconduct and revise the IEP to prevent a recurrence of the misconduct and to provide for the safety of other students and staff.

4. Prior to placing any student in an out-of-district placement due to the challenging behavior of such student, the Board of Education shall conduct a functional behavior assessment of such student and develop or update a behavioral intervention plan for such student. A functional behavior assessment and a behavioral intervention plan shall not be required if the time required to conduct such assessment or develop or update such plan would put the safety of such student, any other student, or any staff at such student's school at risk. Not later than two business days following the decision to not conduct such assessment or develop or update such plan for such student, the Board shall file a notice with the Department of Education of the reasons that such assessment was not conducted or such plan was not developed or updated.

5. If the IEP team finds that the behavior was not a manifestation of the student's disability, the administration may proceed with the recommended expulsion or suspension that constitutes a change in placement.

6. During any period of expulsion, or suspension of greater than ten (10) days per school year, the administration shall provide the student with an alternative education program in accordance with the provisions of the IDEA.

7. The special education records and disciplinary records of the student must be transmitted to the individual(s) who will make the final determination regarding a recommendation for expulsion or a suspension that results in a change in placement.

8. School personnel may remove a disabled student who has violated the conduct code from their current placement for up to 10 school days without a hearing.

C. **Transfer of IDEA students for Certain Offenses:**

School personnel may transfer an IDEA student to an appropriate interim alternative educational setting for not more than forty-five (45) school days if the student:

1. Was in possession of a dangerous weapon, as defined in 18 U.S.C. 930(g)(2), as amended from time to time, on school grounds or at a school- sponsored activity, or

2. Knowingly possessed or used illegal drugs or sold or solicited the sale of a controlled substance while at school or at a school-sponsored activity; or

3. Inflicted serious bodily injury to another person at school, on school premises or at a

school function.

As used in this subsection XIIC., the term "dangerous weapon" means a weapon, device, instrument, material, or substance, animate or inanimate, that is used for, or is readily capable of, causing death or serious bodily injury, except that such term does not include a pocket knife with a blade of less than 2.5 inches in length.

The term "serious bodily injury" means a substantiated risk of death, extreme physical pain, protracted loss or impairment of the function of a bodily member, organ, or mental faculty.

XIV. Procedures Governing Suspension and Expulsion of Students Identified as Eligible for Educational Accommodations under Section 504 of the Rehabilitation Act of 1973

A. **Expulsion of students identified as eligible for educational accommodations under Section 504 of the Rehabilitation Act of 1973:**

Notwithstanding any provision to the contrary, if the administration recommends for expulsion a student identified as eligible for educational accommodations under Section 504 of the Rehabilitation Act of 1973 (a "Section 504 Student") who has engaged in conduct that violated any rule or code of conduct of the school district that applies to all students, the following procedures shall apply:

1. The parents of the student must be notified of the decision to recommend the student for expulsion.

2. The district shall immediately convene the student's Section 504 team (504 team), for the purpose of reviewing the relationship between the student's disability and the behavior that led to the recommendation for expulsion, in order to determine whether the student's behavior was a manifestation of their disability.

3. If the 504 team finds that the behavior was a manifestation of the student's disability, the administration shall not proceed with the recommendation for expulsion. The 504 team shall consider the student's misconduct and revise the 504 plan to prevent a recurrence of the misconduct and to provide for the safety of other students and staff.

4. If the 504 team finds that the behavior was not a manifestation of the student's disability, the administration may proceed with the recommendation for expulsion.

XV. Procedures Governing Suspension and Expulsion of Students Identified as Homeless under the McKinney-Vento Homeless Act

Prior to conducting any hearing regarding the suspension of a student, an administrator, school counselor or school social worker at the school in which the student is enrolled, shall contact the local homeless education liaison designated by the local or regional board of education for the school district, pursuant to Subtitle B of Title VII of the McKinney-Vento Homeless Assistance Act, 42 USC 11431 et seq., as amended from time to time, to determine whether such student is a homeless child or youth, as defined in 42 USC 11343a, as amended from time to time. If it is determined that such student is a homeless child or youth, the administration shall consider the impact of homelessness on the behavior of the student during the hearing.

XVI. Notification to Parents or Guardian

A. The parents or guardian of any minor student either expelled or suspended or removed from class shall be given notice of such disciplinary action within twenty- four (24) hours of the time of the institution of the period of expulsion, suspension or removal from class.

B. The Superintendent of Schools shall forward to the student concerned and their parents, or the student if they have attained the age of 18, a copy of this Board policy on student discipline at the time the Superintendent sends out the notice that an expulsion hearing will be convened.

XVII. Early Readmission to School

An expelled student may apply for early readmission to school. The Board delegates the authority to make decisions on readmissions to the Superintendent. Students desiring readmission to school shall direct such readmission requests to the Superintendent. The Superintendent has the discretion to approve or deny such readmission requests and may condition readmission on specified criteria.

XVIII. Exclusion from Co-Curricular and Extra-Curricular Activities

Participation in co-curricular and extra-curricular activities is a privilege and not an entitlement. Students involved in such programs are expected to follow all school rules and demonstrate good citizenship. Failure to do so may result in partial or complete exclusion from said activities and programs. Activities include, but are not limited to, athletic programs, musical or drama productions, clubs, class activities, proms and school dances, graduation ceremonies, field trips, and school trips out-of-state and abroad.

XIX. Expulsion and Readmission of a Student Placed in a Diversionary Program, Juvenile Residential Center or Other Residential Placement

1. Any student who commits an expellable offense and is subsequently placed in a juvenile residential center or any other residential placement for such offense may be expelled by the Board. The period of expulsion shall run concurrently with the period of placement in a juvenile residential center or other residential placement.

Students

Conduct and Discipline

2. If a student who committed an expellable offense seeks to return to the school district after participating in a diversionary program or having been placed in a juvenile residential center or any other residential placement and such student has not been expelled by the board of education for such offense, the board of education shall allow such student to return and may not expel the student for additional time for such offense.

XX. Dissemination of Student Conduct and Discipline Policy

The Board of Education shall, at the beginning of each school year and at such other times as it may deem appropriate, provide for an effective means of informing all students, parent(s) and/or guardian(s) of this policy.

XXI. Compliance with Reporting Requirements

A. The Board of Education shall report all suspensions and expulsions to the State Department of Education.

B. If the Board of Education expels a student for sale or distribution of a controlled substance, the Board shall refer such student to an appropriate state or local agency for rehabilitation, intervention or job training and inform the agency of its action.

C. If the Board of Education expels a student for possession of a deadly weapon or firearm, as defined in C.G.S. §53a-3, the violation shall be reported to the local police.

(cf. 5128.1 – Plagiarism)
(cf. 5131.1 – Bus Conduct)
(cf. 5131.21 – Threats or Acts of Violence)
(cf. 5131.5 – Vandalism)
(cf. 5131.6 – Drugs, Alcohol, Tobacco)
(cf. 5131.7 – Weapons and Dangerous Instruments)
(cf. 5131.8 – Off-School Grounds Misconduct)
(cf. 5131.81 – Use of Cell Phones and Other Electronic Communication Devices)
(cf. 5131.91 – Hazing)
(cf. 5131.911 – Bullying Regulation and Teen Dating Violence)
(c.f. 5144.12 – Student Discipline: Restorative Practice)
(c.f. 5145.45 – Non-Discrimination)
(c.f. – 5145.5 – Prohibition Against Sexual Harassment)

Legal References: Connecticut General Statutes

4-177 – 4-180 Contested cases. Notice. Record, as amended

10-74j Alternative education (PA 15-133)

Students

Conduct and Discipline

10-233a through 10-233f Suspension, removal and expulsion of students, as amended by PA 95-304, PA 96-244, PA 98-139, PA 07-66, PA 07-122, PA 08-160, PA 09-82, PA 09-6 (September Special Session), PA 10-111, PA 14-229, PA 15-96, PA 16-147, PA 17-220, PA 19-91, , PA 25-67 and PA 25-93.

10-233f In-school suspension of students

Packer v. Board of Educ. of the Town of Thomaston, 246 Conn.89 (1998).
Public Act 98-139

Honig v. Doe, (United States Supreme Court 1988)

Individuals with Disabilities Act, 20 U.S.C. 1400 et seq. as amended by the Individuals with Disabilities Education Act Amendments of 1997 (P.L. 105-17). Section 504 of the Rehabilitation Act of 1973, 29 U.S.C. § 794(a)

P.L. 108-446 Individuals with Disabilities Education Improvement Act of 2004

State v. Hardy, 896 A.2d 755, 278 Conn. 113 (2006)

Public Act 24-45 An Act Concerning Education Mandate Relief, School Discipline and Disconnected Youth, Sections 13-14

Public Act 24-93 An Act Concerning Various and Assorted Revisions to the Education Statutes, Section 11 and Section 12

Public Act 25-67 An Act Concerning the Quality and Delivery of Special Education Services in Connecticut (Section 13)

Public Act 25-93 An Act Increasing Resources for Students, Schools and Special Education (Sections 38 & 39)

Public Act 26-15 An Act Concerning Online Safety

Instruction

Grading/Assessment Systems

Philosophy of Grading and Assessment
It is the philosophy of this district that students respond more positively to the opportunity for success than to the threat of failure. The district seeks, therefore, through learner objectives and its instructional program, to make achievement both recognizable and possible for students. Achievement will be emphasized in the process of evaluating student performance.

Responsibilities in Evaluation and Communication
Evaluation of student progress is a primary responsibility of the teacher. The highest possible level of student achievement is a common goal of both school and home. A close working relationship between home and school is essential to the accomplishment of this goal. Regular communication with parents or guardians, utilizing a variety of means, about the scholastic progress of their student is a basic component of this working relationship.

Use of Artificial Intelligence in Grading and Assessment
Artificial intelligence tools may be used to support instructional planning, feedback, and assessment practices; however, such tools shall not be used as the sole basis for evaluating student work, determining grades, or making decisions regarding student performance. Final responsibility for grading and assessment rests with the educator, who must exercise professional judgment in all evaluation decisions.

Educators shall review and verify any AI-assisted analysis, scoring, or feedback to ensure accuracy, appropriateness, and alignment with established grading criteria and District expectations. When artificial intelligence tools are used to assist in providing feedback or evaluating student work, such use shall support transparency and maintain clear communication with students regarding expectations and evaluation criteria.

Grading and Reporting Practices
It is the responsibility of the school and individual staff members to keep parents or guardians well informed. Regularly used report cards, combined with scheduled parent-teacher conferences, and other communications vehicles helps promote a process of continuous evaluation of student performance. The curriculum contains a wide variety of courses at various levels of academic challenge. Students are allowed considerable choice and are encouraged to strive for academic excellence. A system of grade weighting recognizes the differences in student achievement. Grade weighting encourages and rewards students for selecting courses at more challenging levels of difficulty.

The grading and reporting systems as developed by the administration and faculty are subject to the

Instruction

Grading/Assessment Systems

approval of the Superintendent and Board of Education.

For the Classes of 2019 and beyond, the following shall be used for calculation of weighted GPA (WGPA) and unweighted GPA (GPA).

Grade Point Average (GPA)

A Grade Point Average shall be implemented for the high school in accordance with the guidelines set forth and published annually in the high school parent/student handbook. Parents and students shall be advised annually, via the school's parent/student handbook, of this position and the specifics of the weighted grading program.

All credit-bearing courses will be included in weighted and unweighted Grade Point Average calculations.

Weighted and Unweighted Grade Point Average Modifications/Exclusions

N Grades: N Grades will be counted as an F in all weighted GPA and unweighted GPA calculations.

Summer School: Summer school grades will be excluded from all weighted GPA and unweighted GPA calculations.

Pass/Fail: Pass/Fail grades will be excluded from all weighted GPA and unweighted GPA calculations.

Transfer Courses: All transfer course grades will be excluded from all weighted GPA and unweighted GPA calculations.

Unweighted Grade Point Average (GPA)

An Unweighted Grade Point Average (GPA) will be calculated for each student. The following scale will be used to calculate an Unweighted Grade Point Average (GPA).

Instruction

Grading/Assessment Systems

Unweighted GPA Scale

Letter Grade	Number Grade	Scale
A+	97-100	4.30
A	93-96	4.00
A-	90-92	3.70
B+	87-89	3.30
B	83-86	3.00
B-	80-82	2.70
C+	77-79	2.30
C	73-76	2.00
C-	70-72	1.70
D+	67-69	1.30
D	63-66	1.00
D-	60-62	0.70
F	0-59	0.00
N	0	0.00

Course credit value (i.e. full-credit, half-credit, quarter-credit, etc.) will be factored in Unweighted Grade Point Average calculations.

Weighted Grade Point Average (WGPA)

A Weighted Grade Point Average will be calculated for each student. Course credit value (i.e. full-credit, half-credit, quarter-credit, etc.) and level will be factored in Weighted Grade Point Average calculations.

Level Description

1. Level Honors/Advanced Placement courses are those which are most rigorous and require superior scholarship.
2. Level 1 courses require demonstrated, sound scholarship and study skills. The curriculum is comprehensive, very challenging, and provides advanced college and career preparation.
3. Level 2 courses offer a challenging and comprehensive curriculum requiring above-average academic ability.
4. Level 3 courses provide a foundation for academic work in post-secondary schools and

Instruction

Grading/Assessment Systems

colleges.

5. Combined Level/Contract Level courses create a heterogeneous learning environment in which students contract, depending on the course, for Honors, Level 1, Level 2, or Level 3 work. The contracted weight determines the value of the course for Weighted Grade Point Average calculation.
6. Level Elective courses are challenging and provide a comprehensive curriculum which requires above-average academic ability. Level Elective courses are calculated as L2 in Weighted Grade Point Average Calculation.

The Weighted GPA and Grading System is applicable to grades 9-12 and is described as follows:

Weighted Grade Point Average Scale

The following scale will be used to calculate a Weighted Grade Point Average:

GPA	GPA	LH	L1	L2	L3
A+	4.3	5.6	5.16	4.73	4.3
A	4	5.3	4.86	4.43	4
A-	3.7	5	4.56	4.13	3.7
B+	3.3	4.6	4.16	3.73	3.3
B	3	4.3	3.86	3.43	3
B-	2.7	4	3.56	3.13	2.7
C+	2.3	3.6	3.16	2.73	2.3
C	2	3.3	2.86	2.43	2
C-	1.7	3	2.56	2.13	1.7
D+	1.3	2.6	2.16	1.73	1.3
D	1	2.3	1.86	1.43	1
D-	0.7	2.0	1.56	1.13	0.7
F	0	0	0	0	0

Legal Reference: Connecticut General Statutes

Sec. 10-220g. Policy on weighted grading for honors and advanced placement classes

P.A. 99-81 An Act Concerning Weighted Grading for

Instruction

Grading/Assessment Systems

Honors Classes

P.A. 26-25 An Act Concerning Online Safety

AMITY REGIONAL SCHOOL DISTRICT NO. 5

Bethany Orange Woodbridge

25 Newton Road, Woodbridge, Connecticut 06525

Dr. Jennifer P. Byars ***jennifer.byars@amityregion5.org***
Superintendent of Schools ***203.392.2106***

August 17, 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:

  Nicole Yancey – F/T English Teacher – Nicole returns to Amity bringing 9 years of experience as an English Teacher after a temporary relocation to Atlanta, Ga. for the past 2 years. Nicole earned a Bachelor's Degree in English from University of South Carolina and a Master's Degree in Secondary English from Sacred Heart University.

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

- Amity Regional Middle School – Orange:

  Charlotte Adinolfi – F/T Special Education Teacher – Charlotte brings to Amity 9 years of experience as a Special Education Teacher, most recently from the Milford Public School District. Along with earning a Bachelor's Degree in English/Journalism, a Master's Degree in Special Education and a 6th Yr Certificate, all from Fairfield University, Charlotte also holds an Orton-Gillingham Certification.

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

NEW HIRES-NON-CERTIFIED:

Muhammad Khan **–** Information Technology Specialist – Amity Regional High School, eff 08/31/2026

NEW HIRES-COACHES:

Angela Nielsen **–** Asst. Girls Volleyball Coach **–** 2026 Fall Season – Amity Regional High School
Katie Beezer **–** Asst. Girls Cross Country Coach **–** 2026 Fall Season – Amity Regional High School
Brooke Ferrare **–** Asst. Boys Cross Country Coach **–** 2026 Fall Season – Amity Regional High School

TRANSFERS: NONE

RESIGNATIONS:

Ty Cable – Paraprofessional – Amity Middle School-Bethany, eff. 7/31/2026
Samantha Helwig – Field Hockey Coach – Amity Middle School-Orange, eff. 8/1/2026

RETIREMENTS: NONE