

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, October 05, 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 Regular Meeting – September 28, 2026 [page 4](#)
4. **PUBLIC COMMENT**
5. **CORRESPONDENCE**
6. **CHAIRMAN’S REPORT**
 - a. Committee Reports
 1. **ACES**
 2. **Ad Hoc School Start Time**
 3. **CABE**
 4. **Communications**
 5. **Curriculum**
 6. **District Health and Safety**
 7. **District Technology**
 - a. Monthly Report [page 7](#)
 8. **Facilities**
 - a. Monthly Report [page 8](#)
 9. **Finance**
 - a. Discussion of Monthly Financial Statements [page 9](#)
 - i. Special Education Update
 - b. Director of Finance and Administration Approved Transfers Under \$3,000 [page 39](#)
 - c. Discussion and Possible Action on Budget Transfers over \$3,000 [page 40](#)
 10. **Policy**
 - a. First Read Policies
 - i. 5145.124 – Passive Alcohol Sensor Testing [page 41](#)
 - ii. Policy 5145.12 – Search and Seizure [page 43](#)
 - b. Discussion and Possible Action on Second Read Policies
 - i. Policy 6141.3273 Electronic Resources – Generative AI (Artificial Intelligence) [page 46](#)
 11. **Personnel**
 - a. Personnel Report [page 50](#)
7. **NEW BUSINESS & ANNOUNCEMENTS**
8. **ITEMS FOR THE NEXT REGULAR MEETING AGENDA – Due to Chairperson by October 30, 2026**

PLEASE POST

9. ADJOURNMENT

PLEASE POST



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

pc: Town Clerks Bethany, Orange, Woodbridge

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

District Mission Statement

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

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



NORMS

BE RESPECTFUL

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

HONOR THE POSITION

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

REPRESENT THE BOARD WITH UNITY AND PRIDE

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

AMITY REGIONAL BOARD OF EDUCATION SPECIAL MEETING MINUTES

Monday, September 28, 2026 6:30 pm

25 Newton Road, Woodbridge, CT

Lecture Hall

BOARD MEMBERS PRESENT

Cathy Bradley, Paul Davis, Jennifer Blando Jacquet* (attended via phone, left meeting at 8:25 p.m.), Dr. Karunakaran, Dana Lombardi, Michael McDonough, Meghan Rabuse, Patrick Reed, Donna Schlank, Christian Young

BOARD MEMBERS ABSENT

Cloud-Ingram, Dr. Oladele, Schuster

STUDENT BOARD MEMBERS PRESENT

Shreya Viswanathan and Luca DiSorbo

STAFF MEMBERS PRESENT

Dr. Jennifer Byars, Dr. Shannan Perry Carlson, Andre Hauser, Ernie Goodwin, Dr. Tracy, Kathy Burke, Jill LaPlante

1. CALL TO ORDER

Chairperson Davis called the meeting to order at 6:35 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 – September 14, 2026

MOTION by Cathy Bradley, SECONDED by Patrick Reed to approve the September 14, 2026 minutes as submitted.

MOTION by Donna Schuster (delivered by Chairperson Davis), SECONDED by Dr. Karunakaran to approve the September 14, 2026 minutes with suggested edits:

- A school administrator spoke in support of maintaining the student alcohol testing policy and discussed its role in prevention and student safety.
- An Orange resident spoke regarding concerns with the year-end budget surplus and offered suggestions for the use of surplus funds.
- An ARHS student spoke in support of maintaining the student alcohol testing policy and shared information regarding student perspectives on the policy.

VOTES IN FAVOR, 9 (Bradley, Davis, Jacquet, Dr. Karunakaran, Lombardi, McDonough, Rabuse, Reed, Young)

ABSTAIN, 1 (Schlank)

MOTION CARRIES

4. RECOGNITION OF STUDENTS

- a. 2026-2027 National Merit Scholarship Commended Scholars and Semi-Finalists

Presented by Amity Region 5 Superintendent of Schools Dr. Jennifer Byars and Amity Region 5 High School Mr. Andre Hauser

Chairperson Davis calls for a short recess to allow parents, students, and families to exit.

5. STUDENT REPORT

a. Monthly Report

Presented by Board of Education student representatives Shreya Viswanathan (High School) and Luca DiSorbo (Middle School)

6. STRATEGIC PLANNING

Presented by Dr. Richard Lemons, Executive Director, Partners for Educational Leadership

7. SUPERINTENDENT'S REPORT

- a. Superintendent Report – Enclosure
- b. Public Act 25-93 Annual Report - Enclosure
- c. Athletics Update – Mr. Goodwin
- d. [State Assessment Results Preliminary Review](#) – Dr. Perry Carlson
- e. Middle School Schedule Update – Mrs. Burke and Dr. Tracy

8. CHAIRMAN'S REPORT

- a. Personnel Committee
 - 1. Discussion of Administrative Assistant Union Contract for 2026-2029 (Anticipated Executive Session)

MOTION by Patrick Reed, SECONDED by Dana Lombardi, to enter executive session and invite Dr. Byars to join.

VOTES IN FAVOR, 10 (UNANIMOUS)

MOTION CARRIES

The Board enters Executive Session at 8:24 p.m.

The Board exits Executive Session at 8:31 p.m.

2. Action on Administrative Assistant Union Contract

MOTION by Dana Lombardi, SECONDED by Michael McDonough to approve the Administrative Assistant Union Contract for 2026-2029.

VOTES IN FAVOR, 9 (UNANIMOUS)

MOTION CARRIES

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

None

10. ITEMS FOR THE NEXT REGULAR MEETING AGENDA – Due to Chairperson by September 30, 2026

11. ADJOURNMENT

Chairperson Davis adjourned the meeting at 8:33 p.m. without objection.

Respectfully submitted,

Lisa Zaleski

Lisa Zaleski
BOE Recording Secretary

October 2026

Sep Ticket Summary

Tickets addressed and closed: 236

Tickets open: 4

HS Student Help Desk

189

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:

- Server upgrades and replacements at the High School and Middle Schools has been completed
- Remote classroom at Woodbridge Town Center has been equipped with Amity Wi-Fi and network connectivity as well as Amity phone system
- Security Awareness Training for staff has been reactivated
 - Monthly short training videos
 - Monthly phishing simulations

Projects in process:

- 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 over Winter Break
- Budget building for 2027-2028 SY has begun
- Exploring firewall replacement options for our current Fortinet Firewall that is end-of-life and out of support
- Researching options for replacement specialty lab machines for video editing and digital music at the High School
- Digital sign board expansion at both Middle Schools
 - Two additional boards per school
 - Devos stream sticks used for streaming information to hallway sign boards

October 2026

CLEAN

SAFE

HEALTHY

SCHOOLS

FMX Report
September to date
75 opened
63 resolved



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 expansion fitting for the HVAC loop at AMSO was repaired by an outside contractor.
- The dishwasher at AMSO was repaired by an outside vendor.
- Water bottle filling station filters were replaced District-Wide by our in-house maintainer.
- Numerous toilet and urinal flush valves had to be either cleaned or rebuilt by our in-house maintainer at AMSB.
- Door locks at ARHS were repaired or replaced by our in-house maintainer.
- A greenhouse for Spartan Prep and the Culinary department was delivered to ARHS on September 28th.

Projects in process:

- The media center renovation at ARHS is in progress. To date, all the demo work has been completed. New walls are up; the new floor tile outside the media center is complete; electrical, HVAC, and plumbing rough-in is underway. Door frames are scheduled for installation in the next week or so.
- The bell and paging system upgrades for ARHS are underway. We are awaiting the remaining devices for the lockdown system and are scheduling a December wrap-up and testing.
- The permit for the storage building at AMSB was granted. The District is working with Miller Buildings on construction and delivery dates.
- A new filtration system for the glycol loop at AMSO has been ordered; F&F Mechanical prepped for the installation. We will be working with them on flushing and cleaning the loop. Arrival is scheduled for late October.
- Repairs to a water line in the parking lot at ARHS are scheduled.
- The controller for the AMSB Fire Pump has been ordered.
-

Outstanding issues to be addressed:

The Greenskies engineer has followed up with UI regarding the status of the utility application, which remains under review. In parallel, Greenskies has reengaged its legal team to resume work on the Power Purchase Agreement (PPA) so that the project will be positioned to move directly into engineering once UI completes its review. Assuming utility feedback is received within the next few months, Greenskies continues to anticipate a summer 2027 construction timeline. The updated PPA will be forwarded to the District once it is available.

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	AUG 26	CHANGE	SEPT 26	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	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	221,255	0	221,255	9,913	FAV
3	OTHER STATE GRANTS	1,139,388	1,315,000	1,315,000	(500)	1,314,500	(500)	UNF
4	MISCELLANEOUS INCOME	22,400	21,000	21,000	0	21,000	0	FAV
5	TOTAL REVENUES	58,311,995	58,809,212	58,819,125	(500)	58,818,625	9,413	FAV
6	SALARIES	31,948,569	34,089,387	33,752,022	28,950	33,780,972	(308,415)	FAV
7	BENEFITS	6,616,978	7,666,427	7,679,784	0	7,679,784	13,357	UNF
8	PURCHASED SERVICES	10,609,181	11,074,250	11,111,187	(35)	11,111,152	36,902	UNF
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	3,913,590	0	3,913,590	264,500	UNF
11	EQUIPMENT	377,770	212,901	212,901	0	212,901	0	FAV
12	IMPROVEMENTS / CONTINGENCY	721,511	330,500	280,500	(11,650)	268,850	(61,650)	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	58,736,641	17,265	58,753,906	(55,306)	FAV
16	SUBTOTAL	438,185	0	82,484	16,765	64,719	64,719	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	82,484	16,765	64,719	64,719	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	AUG 26	CHANGE	SEPT 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	WOODBIDGE 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	90,255	0	90,255	9,913	FAV
10	TRANSPORTATION BOWA AGREEMENT	0	0	0	0	0	0	FAV
11	OTHER REVENUE	314,404	211,342	221,255	0	221,255	9,913	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	(500)	19,500	(500)	UNF
16	OTHER STATE GRANTS	1,139,388	1,315,000	1,315,000	(500)	1,314,500	(500)	UNF
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	58,819,125	(500)	58,818,625	9,413	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	AUG 26	CHANGE	SEPT 26	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
1	5111-CERTIFIED SALARIES	26,418,634	28,174,113	27,914,396	43,348	27,957,744	(216,369)	FAV
2	5112-CLASSIFIED SALARIES	5,529,935	5,915,274	5,837,626	(14,398)	5,823,228	(92,046)	FAV
3	SALARIES	31,948,569	34,089,387	33,752,022	28,950	33,780,972	(308,415)	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	179,653	0	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	7,679,784	0	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	11,650	2,551,814	11,650	UNF
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	4,571,037	29,330	4,600,367	65,722	UNF
25	5521-GENERAL LIABILITY INSURANCE	298,269	346,137	344,647	0	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	3,016,528	(41,015)	2,975,513	(38,980)	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	11,111,187	(35)	11,111,152	36,902	UNF

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

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

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2025-2026	2026-2027	AUG 26	CHANGE	SEPT 26	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	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	1,054,959	0	1,054,959	179,000	UNF
34	5420-REPAIRS, MAINTENANCE & CLEANING	851,173	853,839	939,339	0	939,339	85,500	UNF
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	3,913,590	0	3,913,590	264,500	UNF
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	(50,000)	(11,650)	(61,650)	(61,650)	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	280,500	(11,650)	268,850	(61,650)	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	AUG 26	CHANGE	SEPT 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	58,736,641	17,265	58,753,906	(55,306)	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**



SEPTEMBER 2027

2026-2027 FORECAST

OVERVIEW

The projected unspent fund balance for this fiscal year is \$64,719 FAV, previously \$82,484 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 \$202,996 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 **\$9,413 FAV**, previously **\$9,913 FAV** which appears on page 2, column 6, line 21.

LINE 5 on Page 2: ATHLETICS:

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

LINE 6 on Page 2: INVESTMENT INCOME:

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

<u>Month</u>	<u>M&T Bank</u>	<u>State Treasurer's Investment Fund</u>
July 2025	.40%	3.73%
August 2025	.40%	3.74%

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 \$641 higher per full rate student than budgeted. Currently, six tuition students are enrolled, including three at reduced employee rates. *The forecast is \$9,913 FAV, previously \$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 \$500 UNF, previously 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 year-end balance of expenditures is *\$55,306 FAV, previously \$72,571 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 \$216,369 FAV, previously \$259,717 FAV due to estimate turnover projections and vacancies; currently one tutor position is unfilled.*

LINE 2 on Page 3: 5112-CLASSIFIED SALARIES:

The forecast is \$92,046 FAV, previously \$77,648 FAV due to turnover and vacancies. Turnover in the following positions: guards, nurses, technicians, and paraeducators account for the majority of the savings. There are still 2 unfilled paraeducator positions.

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, previously \$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 compared 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
<i>JUL</i>	\$ 647,080	\$ 524,275	\$ 122,805	\$ 847,639	\$ 347,337
<i>AUG</i>	\$ 699,861	\$ 673,934	\$ 25,927	\$ 398,153	\$ 488,825
<i>SEP</i>	\$ 508,509	\$ 512,286	\$ (3,777)	\$ 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	\$ 5,988,350	\$ 5,843,395	\$ 144,955	\$ 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%	102.5%

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
<i>JUL</i>	\$ 72,808	\$ 49,298	\$ 23,510	\$ 45,277	\$ 50,798
<i>AUG</i>	\$ 75,272	\$ 103,562	\$ (28,290)	\$ 58,223	\$ 54,969
<i>SEP</i>	\$ 76,437	\$ 74,744	\$ 1,693	\$ 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	\$ 662,642	\$ 665,729	\$ (3,087)	\$ 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 \$11,650 UNF, previously neutral. There is a transfer requested this month for developing a required Stormwater Management Plan.

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 \$65,722 UNF, previously \$36,392 UNF.*

LINE 25 on Page 3: 5521-GENERAL LIABILITY INSURANCE: *The forecast is \$1,490 FAV, previously \$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 \$38,980 FAV, previously \$2,035 UNF.*

Tuition for the Vo-Ag schools is \$871 FAV, previously neutral.

	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	(0)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	16(17)
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ECA budget is \$64,764, forecast is \$57,552 FAV previously \$7,212 FAV.

	FY22-23 ACTUAL	FY23-24 ACTUAL	FY24-25 ACTUAL	FY25-26 ACTUAL	FY26-27 BUDGET	FY26-27 FORECAST
ECA	18	19	19	14	18	16(18)

Public (ACES) and private out-of-district placements are \$30,987 FAV, previously \$2,035 UNF.

	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	6(7)
Private SPED	16	19	15	19	18	19(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 \$173,000 UNF, previously neutral. The forecast is based on higher usage and fees incurred in FY26. Year to date public benefit charges total: \$3,150 and VNM credits are \$11,929.

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 \$6,000 UNF, previously neutral.*

ELECTRICITY (KILOWATT HOURS)

MONTH	2026-2027 FORECAST	2026-2027 BUDGET	VARIANCE	2025-2026 ACTUAL	2024-2025 ACTUAL
JUL	413,852	329,891	83,961	391,045	352,636
AUG	403,966	351,755	52,211	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	3,688,074	3,551,902	136,172	4,107,992	3,589,872

DEGREE DAYS

There are 820 degree days to date as opposed to 824 last year.

LINE 34 on Page 4: 5420-REPAIRS & MAINTENANCE: *The forecast is \$85,500 UNF, previously neutral. There is a transfer requested this month for the repair of the well pump; \$50,000 to cover the deductible and the remainder is expected to be reimbursed by insurance.*

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 \$38,350 FAV, previously \$50,000 FAV. A transfer was approved in September to cover the well pump at AMSB and a transfer is requested this month for developing a Stormwater Management Plan.*

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 be 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 scrap 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).

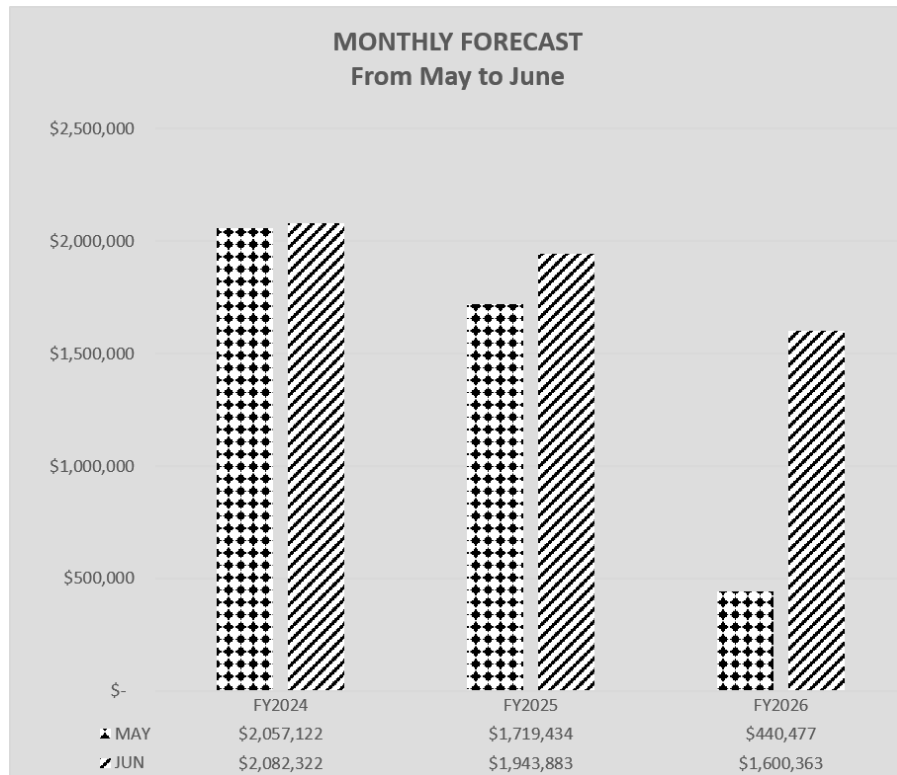
Revenues can be most impacted by decisions made at the State level for Special Education and Transportation grants. The reimbursement rate can change in mid-year as it did in 2024-2025. The State then added a special appropriation in June, the final month of the fiscal year.

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.

FY2025:

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 fees**, \$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

RECAP OF 2023-2024

Unspent Encumbrances Balance:

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

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

FINANCIAL MANAGEMENT:

\$ 323,979

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

SPECIAL EDUCATION:

\$ 295,125

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

OTHER:

\$1,463,218

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

hired which reduced our costs with an outside agency and provided more stability. An outside agency was utilized to cover vacant para positions. Turnover savings were exceeded by \$284,218 and leave of absences were \$185,956.

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

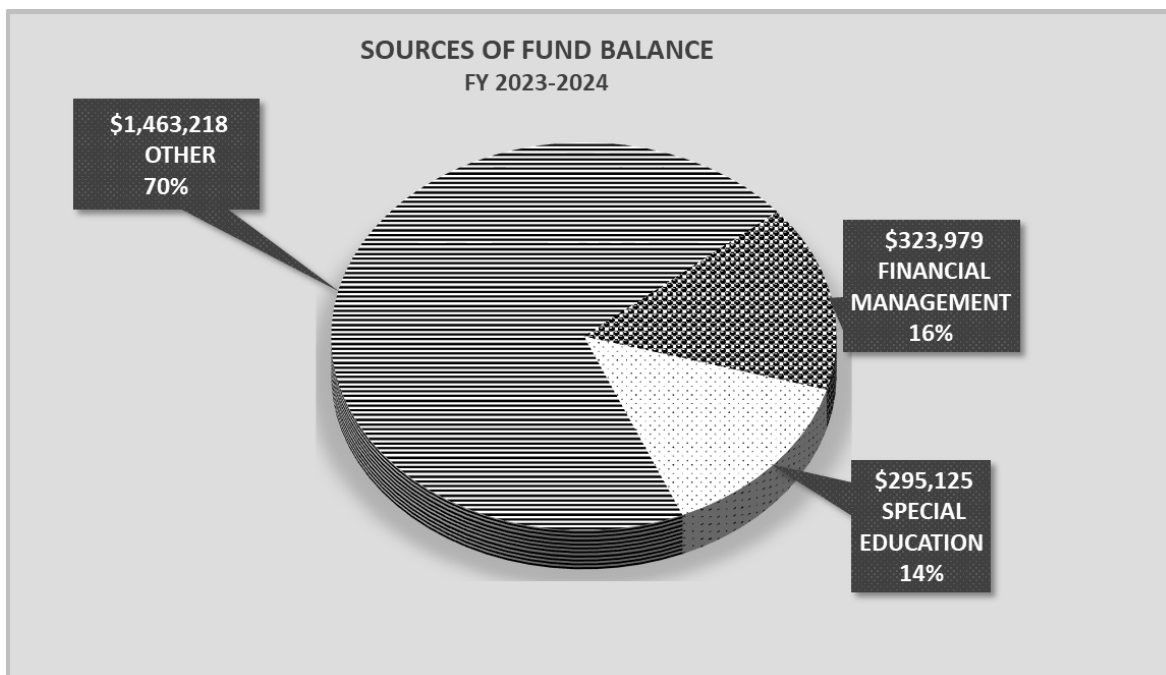
\$30,263 STAFF TRAVEL, CONFERENCES AND DUES & FEES (OTHER): Some staff did not attend conferences as planned due to resignations or scheduling constraints. This results in lower registration fees and travel costs. Several students competitions were still virtual, had capped the number of participants,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

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

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

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

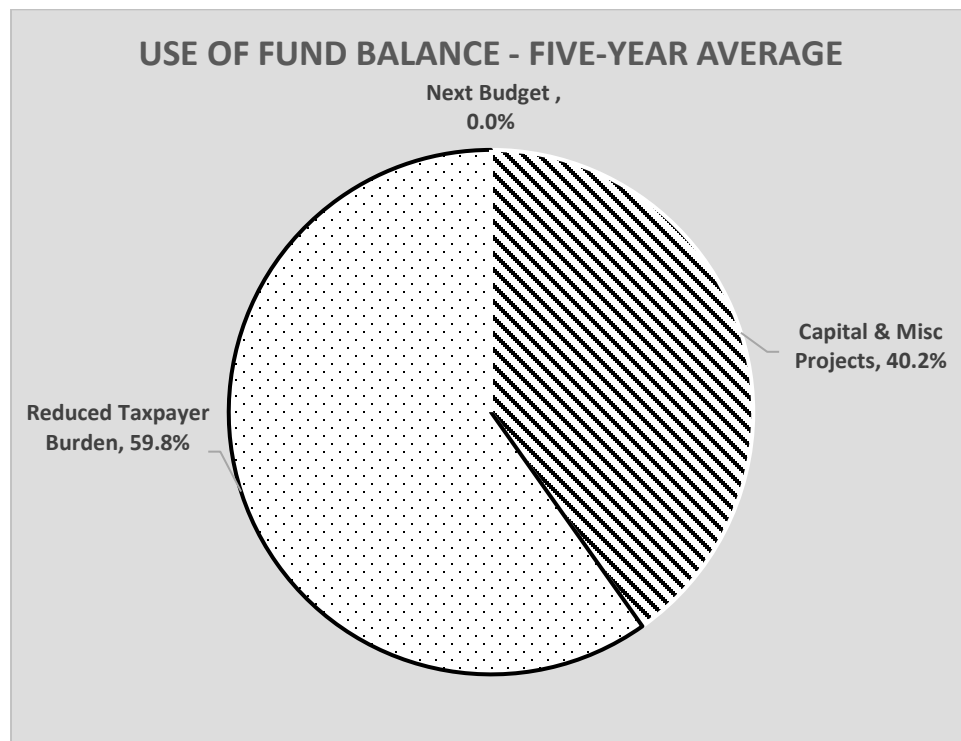
The primary sources of the fund balance are shown graphically below:



The use of the fund balance is proposed as follows:

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

The uses of the fund balance are shown graphically below:



Unspent Funds:

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

APPENDIX 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.

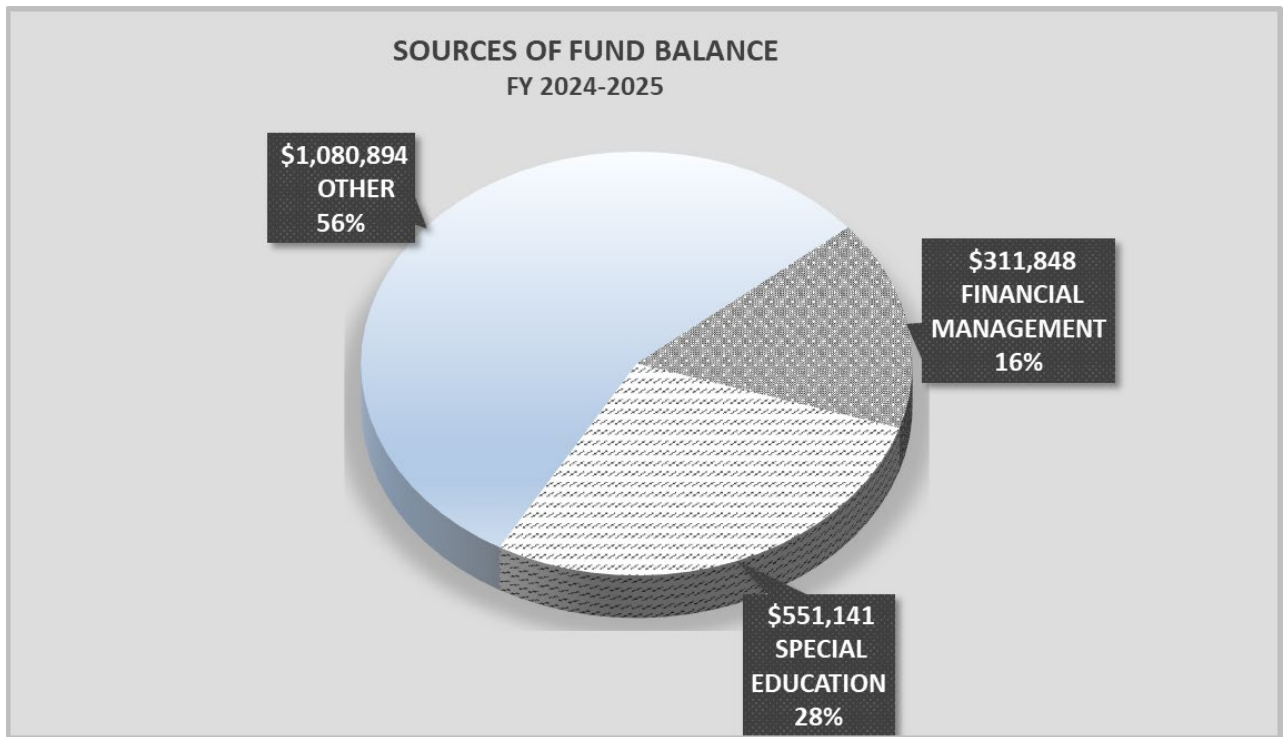
\$42,256 SUPPLIES (OTHER): Instructional supplies are \$63,000 under budget, other supplies are \$11,105 under budget, transportation fuel was under budget \$9,519 and technology supplies are \$13,796 under budget. There was a soft freeze mid-year in response to high medical claims and lower special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

\$59,598 STUDENT TRANSPORTATION (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.

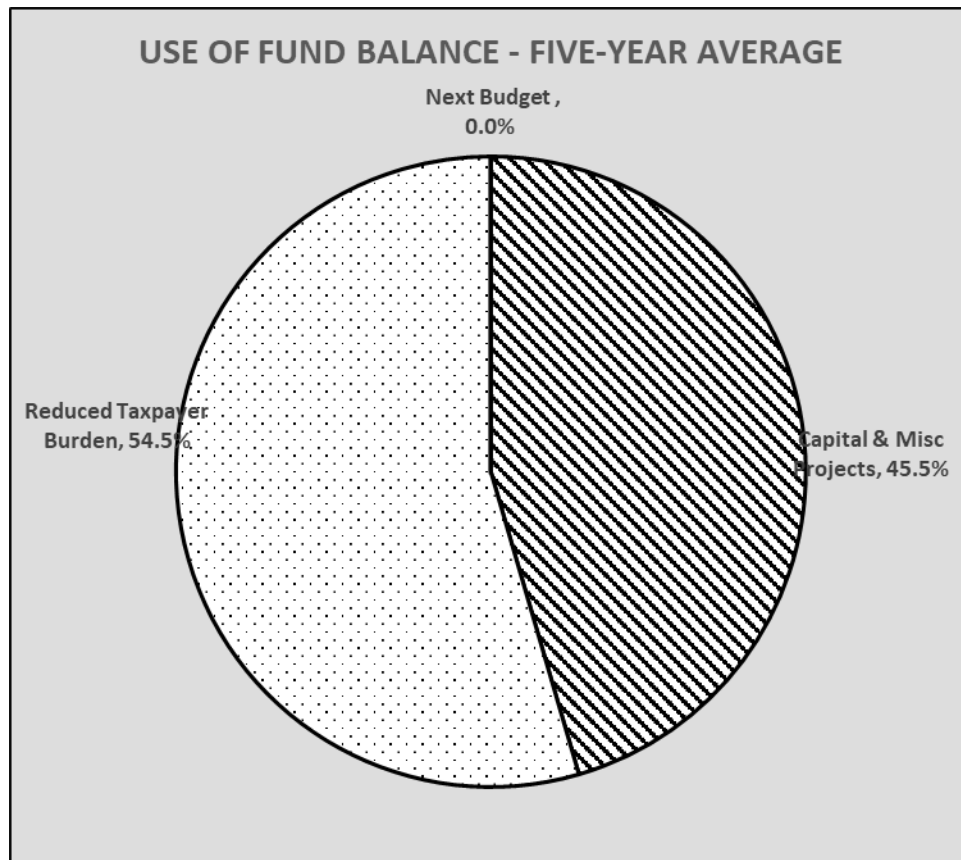
The primary sources of the fund balance are shown graphically below:



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 2025-2026 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.

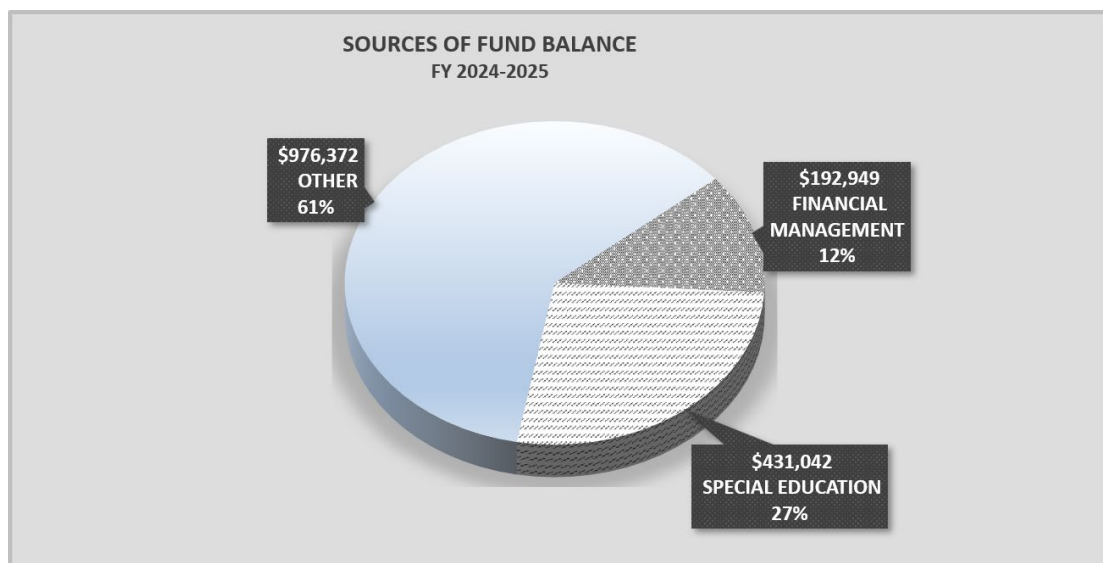
\$539,161 Benefits were under budget \$42,498 due to lower **payroll taxes and life insurance premiums** directly related to vacancies, turnover, and leaves of absences; **Medical insurance** was under budget, \$503,679 due to changes in employee coverages, vacancies, additional premiums collected from 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 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

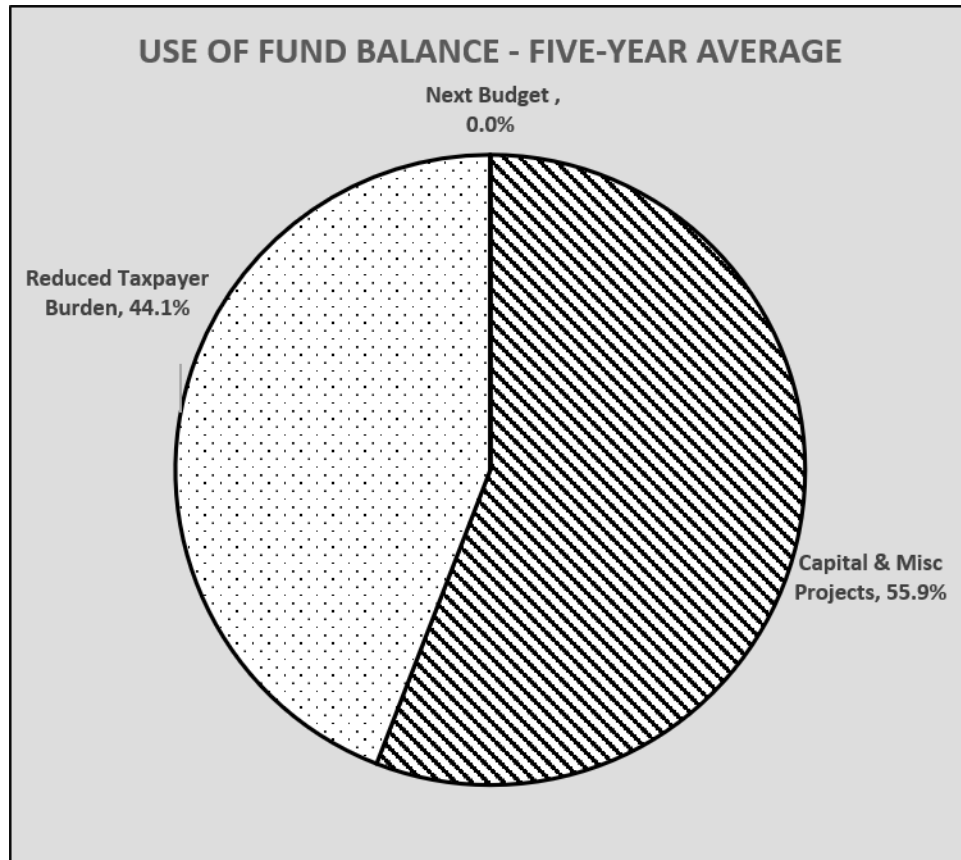
The primary sources of the fund balance are shown graphically below:



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 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
Aug-26	27	1 -03-11-1016-5611 INSTRUCTIONAL SUPPLIES	\$ (550.00)	Transfer For Conference
Aug-26	27	1 -03-11-1016-5581 TRAVEL - CONFERENCES	\$ 550.00	Transfer For Conference
Aug-26	82	1 -02-13-2220-5330 PROFESSIONAL & TECH SRVC	\$ (1,279.00)	Bookbreak Membership
Aug-26	82	1 -02-13-2220-5642 LIBRARY BOOKS & PERIODICALS	\$ (45.00)	Bookbreak Membership
Aug-26	82	1 -02-13-2220-5810 DUES & FEES	\$ 1,324.00	Bookbreak Membership
Aug-26	83	1 -01-13-2220-5330 PROFESSIONAL & TECH SRVC	\$ (1,279.00)	Bookbreak Membership
Aug-26	83	1 -01-13-2220-5642 LIBRARY BOOKS & PERIODICALS	\$ (45.00)	Bookbreak Membership
Aug-26	83	1 -01-13-2220-5810 DUES & FEES	\$ 1,324.00	Bookbreak Membership
Aug-26	150	1 -05-13-2212-5580 STAFF TRAVEL	\$ (1,500.00)	Prof. Learning Supplies
Aug-26	150	1 -05-13-2213-5590 OTHER PURCHASED SERVICES	\$ 1,500.00	Prof. Learning Supplies
SEPT				
Sep-26	11	1 -02-11-1010-5611 INSTRUCTIONAL SUPPLIES	\$ (300.00)	Equipment -Theatre
Sep-26	11	1 -02-11-1010-5730 EQUIPMENT - NEW	\$ 300.00	Equipment -Theatre
Sep-26	48	1 -03-13-2400-5330 PROFESSIONAL & TECH SRVC	\$ (1,658.00)	Purchase Remarkable Tablets
Sep-26	48	1 -05-14-2350-5732 EQUIPMENT-TECHNOLOGY-NEW	\$ 1,658.00	Purchase Remarkable Tablets
Sep-26	143	1 -03-13-2220-5690 OTHER SUPPLIES	\$ (1,996.00)	Conference Expenses
Sep-26	143	1 -03-13-2220-5581 TRAVEL - CONFERENCES	\$ 1,996.00	Conference Expenses
Sep-26	156	1 -03-13-2220-5810 DUES & FEES	\$ (757.00)	Transfer For Conference
Sep-26	156	1 -03-13-2220-5581 TRAVEL - CONFERENCES	\$ 757.00	Transfer For Conference

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



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

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

To: Jennifer Byars, Ed. D., Superintendent of Schools
From: Theresa Lumas, Director of Finance and Administration
Re: Budget Transfers over \$3,000
Date: September 28, 2026

Facilities:

Mr. Martoni is requesting a budget transfer for development of a Stormwater Management Plan, which has been mandated by the CT Department of Energy & Environmental Protection (DEEP). Fuss & O'Neill, our safety services consultant, submitted proposals for Amity Regional High School and Amity Middle School Bethany.

Amity Regional School District No. 5 is required to address new stormwater management requirements established by the Connecticut Department of Energy and Environmental Protection (CT DEEP) under the General Permit for the Discharge of Stormwater Associated with Commercial Activity (CSGP), which became effective December 1, 2025. The permit applies to qualifying sites with five or more acres of contiguous impervious surface and requires covered facilities to develop and implement a Stormwater Management Plan (SMP) designed to reduce pollutants in stormwater runoff through appropriate management practices, inspections, maintenance, and stormwater control measures. CT.gov.

Two of the District's three schools based on the review conducted by Fuss & O'Neill, are subject to the new permit requirements: Amity Regional High School and Amity Middle School Bethany.

These campuses contain school buildings, parking areas, athletic facilities, and other impervious surfaces that collectively exceed the applicable five-acre threshold at each location. As existing sites not previously covered by the permit, qualifying facilities must register with CT DEEP by **December 1, 2026**, and preparation of a site-specific Stormwater Management Plan is part of the registration process.

Mr. Martoni has some funds available from summer training that can be applied to the high school project, which costs \$19,000. The funds were encumbered last year for Bethany, which is \$17,000. A transfer is requested from contingency to professional technical services.

ACCOUNT NUMBER	ACCOUNT NAME	TO	FROM
05-14-2600-5330	Professional & Technical	\$11,650	
05-14-2600-5715	Facilities Contingency		\$11,650

Students

Search and Seizure

~~Breathalyzer~~ **Passive Alcohol Sensor Testing**

This policy provides the basic structure for the use of passive alcohol sensors in the Amity Regional School District No. 5 to detect/confirm alcohol consumption by students.

The passive alcohol sensor device is a non-invasive high-speed breath alcohol-screening instrument which can be used as a “sniffer” for overt or covert alcohol detection. This device may be used to sample a student’s breath in order to detect alcohol use.

The District does not consider the use of a passive alcohol-screening device as constituting a “search”; therefore, the issue of trespass or intrusion into a student’s privacy is not a factor in the use of this device.

Trained district personnel are authorized to use the passive alcohol screening device(s) in the following instances:

1. To screen all participants at dances. If the student(s) tests positive or if the student(s) declines to take the screening, when reasonable suspicion exists, the student(s) will not be admitted to the dance, and the student(s)’ parents/guardians will be called to pick up. He/she may be subject to appropriate disciplinary action as set forth in the District’s disciplinary policies.
2. If a student(s) refuses the screening (and no reasonable suspicion exists), the student(s)’ parents/guardians will be called, and the student(s) will not be admitted to the dance.
3. As part of a nursing assessment, in the health office by staff nurses when reasonable suspicion of alcohol exists during the school day.

Reasonable suspicion shall refer to any of the following:

1. Observed use or possession of alcohol, or
2. Apparent physical state of impairment of motor function, or
3. Marked changes in personal behavior not attributable to other factors.

(cf. 5131.6 – Drugs, Alcohol, Tobacco)
 (cf. 5131.8 – Out of School Misconduct)
 (cf. 5145.11 Questioning and Apprehension)
 (cf. 5145.12 – Search and Seizure)

Legal Reference: Connecticut General Statutes

10a-18 Programs to be offered on effects of drugs and alcohol.

Policy Updated:

AMITY REGIONAL SCHOOL DISTRICT NO. 5
 Woodbridge, Connecticut

Students

Search and Seizure

~~Breathalyzer~~ **Passive Alcohol Sensor** Testing

10-19 Teaching about alcohol, nicotine or tobacco, drugs and acquired immune deficiency syndrome. Training of personnel.

10-154a Professional communications between teacher or nurse and student. Surrender of physical evidence obtained from students.

10-221d Boards of education to prescribe rules re; use, sale or possession.

21a-240 Definitions, dependency producing drugs.

21a-243 Regulation re schedules of controlled substances.

New Jersey v. T.L.O., 469 325; 105 S.Ct. 733 (1985)

Veronia School District 47J v. Acton, 515 U.S. 646 (1995)

Todd v. Rush County Schools, 133F.3d 984 (7th Cir. 1998)

Knox County Education Association v. Knox County Board of Education, 158 F3d 361, 3885-386 (6th Cir. 1998)

Students

Search and Seizure

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

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

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

Definitions

"Reasonable suspicion" means sufficient knowledge possessed by the District official at the time the official makes or authorizes the search which would lead a reasonable person to believe that a search of a particular student or place will likely turn up evidence of a violation of law; Board policy; administrative regulation; school rule; or the existence of an emergency/dangerous circumstances that is reasonably believed to have the potential to cause harm to the student, others, or property. The official's knowledge may be based upon relevant past experience of the official, observation by the official, and/or credible information from another person.

"Past experience" may provide the district official with information relevant to the potential violation as well as information which enables the official to evaluate the credibility of information from another student.

"Credible information from another person" may include information which the district official reasonably believes to be true provided by another District employee, a student, a law enforcement or other government official, or some other person.

"Emergency/Dangerous Circumstances" means a District official has knowledge which would lead a reasonable person to believe that either an emergency or dangerous circumstance exists and that it is necessary to act to protect the safety of any person or property.

"Reasonable in scope" means the manner and extent of the search are reasonably related to the objectives of the search, limited to the particular student or students most likely to be

Students

Search and Seizure

involved in the infraction and not excessively intrusive in light of the student's age, sex, maturity or the nature of the infraction.

Desks and School Lockers

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

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

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

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

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

Student Search

A student may be searched if there are reasonable grounds for suspecting that the search will turn up evidence that the student has violated or is violating either the law or the rules of the school the scope of the search must be reasonably related to the objectives of the search and the nature of the infraction. Personal searches of students and searches of student property shall be limited to the search of purses, knapsacks, book bags, and the like; outer coats and jackets, footwear, belts, pockets, hair, hats, cell phones, and personal vehicles.

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

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

Students

Search and Seizure

(cf. 5131.81 – Use of Cell Phone and Other Personal Electronic Devices)

Legal Reference: Connecticut General Statutes

10-221 Boards of Education to prescribe rules

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

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

Instruction

Electronic Resources – Generative AI (Artificial Intelligence)

Purpose

The Amity Regional School District No. 5 (District) Board of Education (Board) is committed to providing students with innovative and effective educational experiences to foster high levels of learning and opportunities for self-expression. As schools prepare students for a future that demands adaptability, critical thinking, and increased digital literacy, the District recognizes the potential of artificial intelligence (AI) and other related technologies.

The Amity Regional School District No. 5 (District) Board of Education (Board) acknowledges that technology is ever-changing and that artificial intelligence, including generative forms of AI, is becoming more a part of our everyday lives. The responsible integration of AI into the District's educational environment is a necessary condition as technology continues to evolve.

The District recognizes both the opportunities and challenges presented by AI and seeks to promote its thoughtful and responsible use to support student learning, creativity, and future readiness.

AI systems shall support, not replace, professional judgment and decision-making. Final responsibility for instructional, evaluative, and operational decisions remains with District personnel. AI is not a substitute for human creativity, judgement, and creation. AI may be used to enhance professional practice, improve efficiency, and support teaching, learning, and district operations.

This policy establishes a framework for the responsible, equitable, and effective integration of artificial intelligence technologies in district schools to enhance both administrative functions and teaching and learning for all students and educators.

Definitions

Artificial Intelligence (AI): is any computer/program that demonstrates the ability to learn, to imitate human or animal language or behaviors, in any manner possible and/or to understand human/animal behavior.

Responsible Use: The transparent and accountable use of artificial intelligence (AI) in a manner that supports teaching, learning, and District operations while upholding academic integrity, protecting student and staff privacy, and complying with all applicable laws, regulations, and District policies.

Role in Curriculum and Instruction

Policy Adopted:

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The District shall provide educators with high-quality, multifaceted, ongoing professional learning opportunities that help increase their AI literacy and understand what, how, and why specific AI is being used in their educational settings.

The District shall take steps to ensure all students and educators become AI literate and develop a sense of competency with these technologies. AI may be used as a resource across all subject areas and disciplines.

The District shall provide grade-appropriate instruction for students on the safe and responsible use of artificial intelligence and digital technologies. Instruction shall include digital citizenship, online safety, protection of personal information, awareness of misinformation and bias, and responsible use of AI-enabled tools and platforms.

Artificial intelligence tools may produce inaccurate or incomplete information. The accuracy of AI-generated content is never guaranteed, and users are responsible for reviewing and verifying all outputs/content. When employees or students use AI in the performance of their work, they remain accountable for the quality of their work product.

Student Data Privacy

All AI tools shall comply with the Family Educational Rights Act (FERPA), Connecticut student privacy laws, and other applicable federal and state requirements.

Selection of AI Platforms

The District shall establish a review and approval process for artificial intelligence tools that considers instructional value, developmental appropriateness, equity, data privacy, and alignment with District goals. Only AI platforms that meet established criteria and receive District authorization shall be permitted for use, and such tools shall be subject to periodic review to ensure continued effectiveness and compliance. AI tools may be adopted on a pilot or trial basis. The Superintendent or their designee shall periodically inform the Board of Education, through the Curriculum Committee, of artificial intelligence tools approved for use in the District, including any significant additions or changes.

The District shall inform educators, parents, and students of the AI tools approved for use in the schools.

Prohibited Uses

AI use by students must align with district policies and regulations around academic integrity, such that students may not misrepresent AI or partially AI-generated work as their own.

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AI use by administrators, teachers, and staff must be done in a manner consistent with applicable professional codes of conduct and district policies.

The District prohibits the use of AI as the sole factor in making the final determination on student assessments, evaluations, or grades.

The District prohibits the entering of employee or student images and Protected Personal Information (PPI) into any AI tools and/or resources.

AI notetakers or similar technologies (collectively “AI notetakers”) are not permitted in meetings that discuss individual student matters, legal matters, or other sensitive matters. If AI notetakers will be used in meetings, their presence must be disclosed. If any participant in the meeting objects to the participation of the AI notetaker, the notetaker shall be removed from the meeting.

Establishment of an AI Council

The District shall establish an AI Council as a subset of the District Technology Committee to monitor AI use, address interest holder concerns, and recommend improvements. The AI Council shall conduct, at minimum, an annual evaluation of AI tools and practices to ensure they meet district goals. The AI Council may engage educators, students, families, and local associations to gather input on AI use in schools.

Development of an Administrative Regulation

A regulation, developed by the superintendent, for utilizing AI for innovative, organizational, and management uses shall be established in order to keep pace with technology advancements across the field of Artificial Intelligence.

As with any new technology, the understanding of appropriate use may evolve with time, and it is expected that the Superintendent will review and update the regulation as warranted.

Review and Resolution of Concerns Related to AI Use

Concerns regarding the use of artificial intelligence in instructional practices, student work, or decision-making shall be addressed through the District’s established chain of communication for curriculum and instruction matters. Individuals are expected to seek resolution at the appropriate level and follow the established process for escalation when concerns are not resolved.

Concerns related to artificial intelligence tools, systems, or broader implementation practices may also be referred to the District’s AI Council for review and consideration, as appropriate.

Ongoing Review

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Given the rapidly evolving nature of artificial intelligence, this policy shall be reviewed periodically and updated as necessary to reflect changes in technology, law, and educational practice.

- c.f. (4118.22 – Code of Professional Responsibility)
- (4118.5 – Acceptable Computer Network Use)
- (5131 – Conduct and Discipline)
- (6141.32 – Computer Literacy)
- (6141.321 – Acceptable Use of Computers and Technology)
- (6146.1 – Grading/Assessment System)

Legal Reference: Public Act 23-16 An Act Concerning Artificial Intelligence, Automated Decision-Making and Personal Data Privacy

Public Act 24-151 An Act Authorizing and Adjusting Bonds of the State and Concerning Provisions Related to State and Municipal Tax Administration, General Government and School Building Projects

Public Act 26-15 An Act Concerning Online Safety

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



Dr. Jennifer P. Byars
Superintendent of Schools

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203.392.2106

October 5, 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: NONE
- Amity Regional Middle School – Bethany: NONE
- Amity Regional Middle School – Orange: NONE

NEW HIRES-BENCH/LONG TERM SUBSTITUTES/TUTORS:

Qaisar Shah – ISS Tutor – District-wide

NEW HIRES-NON-CERTIFIED:

Daniel Zaleski – Part Time School Security Officer – Amity Middle School - Orange
Eileen Perchinski – Part Time School Security Officer – Amity Middle School - Bethany

NEW HIRES-COACHES:

Tess Csejka – Field Hockey Coach – 2026 Fall Season – Amity Middle School-Orange

TRANSFERS: NONE

RESIGNATIONS:

Kimberly Sperry – Paraprofessional – Amity Middle School-Orange, eff. 9/30/2026
Madison Vitti – Softball Co-Coach – 2027 Spring Season – Amity Middle School-Orange
Ed Landa – Softball Co-Coach – 2027 Spring Season – Amity Middle School-Orange
Tyshawn Cannon – Asst. Girls Basketball Coach – 2026 Winter Season – Amity Regional High School

RETIREMENTS: NONE