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, April 4, 2022, 6:30 pm 25 Newton Road, Woodbridge, CT

- 1. CALL TO ORDER
- 2. PLEDGE OF ALLEGIANCE
- 3. APPROVAL OF MINUTES
 - a. Regular Board of Education Meeting March 14, 2022 Page 4
- 4. STUDENT REPORT
 - a. Monthly Report
- 5. PUBLIC COMMENT
- 6. SUPERINTENDENT'S REPORT
 - a. Personnel Report Page 10
 - b. Superintendent Report *Page 11*
- 7. CORRESPONDENCE
- 8. CHAIRMAN'S REPORT
 - a. Committee Reports
 - 1. ACES
 - 2. CABE
 - 3. Curriculum
 - 4. Discussion and Possible Action on Dissolving Ad Hoc School Safety Committee
 - 5. District Health and Safety
 - 6. District Technology
 - a. Monthly Report Page 14
 - 7. Facilities
 - a. Monthly Report Page 15
 - 8. Finance
 - a. Confirm Annual District Meeting Date of May 2, 2022 and Referendum Date of May 3, 2022 *Page 16*
 - b. Discussion and Possible Action on Award of Contracts over \$35,000 Page 17
 - Auditing Services
 - 2. Investment Consultant
 - c. Discussion of Monthly Financial Statements *Page 20*
 - d. Director of Finance and Administration Approved Transfers Under\$3,000 *Page 51*
 - e. Discussion and Possible Action on Budget Transfers over \$3,000 Page 53
 - f. Capital Projects Financial Report *Page 56*

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- 9. Policy
 - a. First Read
 - 1. Policy 5144.1 Restraint and Seclusion *Page 61*
 - 2. Policy 4148 Employee Protection *Page 69*
 - 3. Bylaw 9325 Meeting Conduct *Page 73*
 - b. Second Read
 - 1. Policy 4217.4 Dismissal/Suspension *Page 76*
 - 2. Policy 4222.1 Title 1 Paraprofessionals *Page 77*
 - 3. Policy 4250 Leaves and Vacations (recommendation to remove) Page 79
- 10. Personnel
- 9. **NEW BUSINESS**
- 10. ITEMS FOR THE NEXT AGENDA Due to Chairperson by April 20, 2022
- 11. ADJOURNMENT

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

pc: Town Clerks: Bethany, Orange, Woodbridge

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

District Mission Statement

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

AMITY REGIONAL SCHOOL DISTRICT NO. 5 BOARD OF EDUCATION



Bethany Orange Woodbridge

NORMS

BE RESPECTFUL

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

HONOR THE POSITION

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

REPRESENT THE BOARD WITH UNITY AND PRIDE

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

BOARD MEMBERS PRESENT

John Belfonti, Christopher Browe, Shannan Carlson, Paul Davis, Carla Eichler, Sean Hartshorn, Andrea Hubbard, Christina Levere-D'Addio, Dr. Carol Oladele, Donna Schuster, Dr. K. Sudhir, Dr. Jennifer Turner, Patrick Reed (arrived 6:36 p.m.)

BOARD MEMBERS ABSENT

None

STUDENT REPRESENTATIVES PRESENT

Alison Bowler

STAFF MEMBERS PRESENT

Dr. Jennifer Byars, Theresa Lumas, Frank Barretta, Thomas Brant, Kathy Burke, Shaun DeRosa, Brian Dower, Kathleen Kovalik, Jill LaPlante, Anna Mahon, Stephen Martoni, Dr. Jason Tracy

1. CALL TO ORDER

Chairperson Belfonti called the meeting to order at 6:31 p.m.

2. PLEDGE OF ALLEGIANCE

Recited by those present

3. APPROVAL OF MINUTES

a. Board of Education Regular Meeting - February 14, 2022

MOTION by Carla Eichler, SECOND by Sean Hartshorn, to approve minutes as submitted VOTES IN FAVOR, 12 (unanimous)
MOTION CARRIED

b. Board of Education Special Meeting - February 23, 2022

MOTION by Paul Davis, SECOND by Sean Hartshorn, to approve minutes as submitted VOTES IN FAVOR, 12 (unanimous)
MOTION CARRIED

c. Board of Education Special Meeting - March 7, 2022

MOTION by Andrea Hubbard, SECOND by Donna Schuster, to approve minutes as submitted VOTES IN FAVOR, 9 (Belfonti, Browe, Carlson, Davis, Hartshorn, Hubbard, Levere-D'Addio, Schuster, Turner)
ABSTAINED, 3 (Eichler, Oladele, Sudhir)
MOTION CARRIED

4. STUDENT REPORT

a. Monthly Report

5. RECOGNITION OF NATIONAL MERIT SCHOLARSHIP FINALISTS

Presented by Anna Mahon

6. PUBLIC COMMENT

Resident spoke about budget.

7. PRESENTATION AND POSSIBLE ACTION ON SUPERINTENDENT'S PROPOSED 2022-2023 BUDGET

Presented by Kathy Burke, Dr. Tracy, Anna Mahon, Frank Barretta, Jill LaPlante, and Dr. Byars

MOTION by Dr. Turner, SECOND by Shannan Carlson, to approve the budget for the fiscal year 2022-2023 at a 3.99% increase

VOTES IN FAVOR, 12 (Belfonti, Browe, Carlson, Davis, Eichler, Hubbard, Levere-D'Addio, Oladele, Reed, Schuster, Sudhir, Turner)

OPPOSED, 1 (Hartshorn)

MOTION CARRIED

MOTION by Carla Eichler, SECOND by Christopher Browe, to authorize Amity Regional School District No. 5 to prepare an Explanatory Text for the Budget Referendum Question: BE IT RESOLVED, that the Secretary of the Board of Education of Amity Regional School District No. 5 is authorized to prepare, print, and distribute a concise explanatory text of the budget referendum question which, by vote of the member towns, which text shall not advocate either the approval or disapproval of the question and shall otherwise be prepared in accordance with Connecticut General Statutes Section 9-369b.

VOTES IN FAVOR, 13 (unanimous) MOTION CARRIED

Chairperson Belfonti called meeting recess at 9:00 p.m. Meeting resumed at 9:08 p.m.

8. SUPERINTENDENT'S REPORT

- a. Personnel Report
- b. Superintendent Report

9. CORRESPONDENCE

Summarized by Carla Eichler

10. CHAIRMAN'S REPORT

- a. Committee Reports
 - 1. ACES
 - Ad Hoc School Safety

Chairperson Belfonti requested that the Ad Hoc School Safety Committee (committee of the whole) be dissolved and no longer listed on meeting agendas.

3. CABE

- 4. Curriculum
- 5. District Health and Safety
- 6. District Technology
 - a. Monthly Report
- 7. Facilities
 - a. Monthly Report
- 8. Finance
- a. Presentation and Discussion of Fourth Quarter 2021
 Executive Summary Review of Amity Pension Fund, Sick and Severance Account, and OPEB Trust
- b. Discussion and Possible Action on Award of Contracts over \$35,000
 - 1. Workers' Compensation
 - 2. Liability, Auto, and Property

MOTION by Shannan Carlson, SECOND by Andrea Hubbard, to award a 3-year contract to CIRMA for workers' compensation and liability, auto and property insurances with rate limits proposed in the Budget Stabilization Program for LAP at 0% year 1, maximum 3% in both years 2 and 3 and a 5% reduction in year 1 for workers' compensation plus exposures VOTES IN FAVOR, 13 (unanimous) MOTION CARRIED

- c. Discussion of Monthly Financial Statements
- d. Director of Finance and Administration Approved Transfers Under \$3,000
- e. Other

9. Policy

- a. First Read
 - 1. Policy 4217.4 Dismissal/Suspension
 - 2. Policy 4222.1 Title 1 Paraprofessionals
 - 3. Policy 4250 Leaves and Vacations (recommendation to remove)
- b. Second Read
 - 1. Policy 9132 Committees
 - 2. Policy 4151.1 Personal Illness (recommendation to remove)
 - 3. Policy 4160/4260 Chronic Communicable Disease (recommendation to remove)

MOTION by Christopher Browe, SECOND by Shannan Carlson, to:

- Approve Policy 9132 Committees
- Remove Policy 4151.1 Personal Illness
- Remove Policy 4160/4260 Chronic Communicable Disease

VOTES IN FAVOR, 13 (unanimous)
MOTION CARRIED

10. Personnel

11. NEW BUSINESS

Communications Committee

12. ITEMS FOR THE NEXT AGENDA – Due to Chairperson by March 25, 2022

13. ADJOURNMENT

MOTION by Christopher Browe, SECOND by Sean Hartshorn, to adjourn meeting VOTES IN FAVOR, 13 (unanimous)
MOTION CARRIED

Meeting adjourned at 9:30 p.m.

Respectfully submitted,

Pamela Pero
Pamela Pero, Recording Secretary



AMITY REGIONAL SCHOOL DISTRICT NO. 5

Bethany Orange Woodbridge 25 Newton Road, Woodbridge, Connecticut 06525



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

April 4, 2022

To: Members of the Board of Education

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

Re: Personnel Report

- **♣** New Hires-Certified: None
- Amity Regional High School:
- Amity Regional Middle School Bethany:
- Amity Regional Middle School Orange:
- **♣** New Hires-Bench/Long Term Substitutes: None
- **♣** New Hires-Non-Certified: None
- **♣** NEW HIRES-COACHES:

Lauren Pitney – Assistant Softball Coach - 2022 Spring Season – Amity Regional High School

TRANSFERS:

Peter Downhour – FT Social Studies Teacher at Amity Regional High School to the position of District Diversity, Equity and Inclusion Instructional Coach, effective 2022-2023 school year.

Seth Davis – FT Social Studies Teacher at Amity Regional High School to the position of Student Learning Management System/SIS Liaison Instructional Coach, effective 2022-2023 school year.

- **♣** RESIGNATIONS: NONE
- **RETIREMENTS:**

Peter Silva – Spanish Language Teacher, Amity Regional High School, eff. 06/30/2022

AMITY REGIONAL SCHOOL DISTRICT NO. 5

Bethany Orange Woodbridge 25 Newton Road, Woodbridge, Connecticut 06525



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

Superintendent's Report – April 2022

Continuously improve instruction, cultivate creativity, and enhance student engagement and performance.

Enhance the efficient and effective use of resources.

Foster a supportive climate for students and adults.

Instruction

March 23rd Special Programming Day: Our SAT/Pre-ACT testing went extremely well in large part as a result of the practice session on March 11th. Sophomores and juniors were focused throughout the testing. Ninth grade students actively participated in the workshops based around our No Place for Hate efforts and had the opportunity to discuss and reflect on their own strengths as members of our school community. Seniors completed their preparations for SSLP/SIP/post-graduation. The day was a resounding success!

2022-2023 Scheduling Process: As a follow-up to last month's presentation to the BOE regarding scheduling, the process for scheduling the 2022-2023 school year is fully underway as the administrators, department chairs and counselors review requests, identify section numbers, and begin to run the master schedule in PowerSchool. The master schedule is predicated on student requests and is a reflection of our commitment to supporting students as they work to emulate the characteristics outlined in the BOWA Portrait of the Graduate.

Journey into Africa: On March 30, 2022, AMSB seventh grade students were treated to a presentation from the Journey into Africa program. The presentation introduced students to the art of African storytelling as a manner to preserve and retell history of the African people. They discussed the cultural importance of and connection to storytelling and music. The presentation ended with a demonstration of music and incorporated student participation in a drumming circle.

AMSO Spring Student Clubs: The AMSO Video Production Club, sponsored by the Jamie Hulley Foundation, began meeting at the end of March. The club gives students the opportunity to write, direct, act, and produce a short film. Students are excited to learn the introductory aspects of making a film from start to finish. The AMSO Farm and Garden Club has started work in the greenhouse. Students have begun planting a variety of seeds for flowering plants to be used to fill the planters in the front of the building.

AMSO Career Fair: AMSO students attended the Career Fair on March 25, 2022. Over 30 presenters from a wide variety of occupations came together to share information about their workplace, their job, and the education and skills that are needed for success in their career. Students enjoyed many hands-on, interactive displays that helped connect what they are learning in school with the workplace.

AMSB Spring Concert: The AMSB Spring Concert will be held on May 5, 2022. AMSB students and staff are hard at work preparing the songs and performances that will make this event special. Due to the number of students and expected attendees, we will follow a similar format to the winter concert and perform the choir and band concerts separately, but on the same evening.

AMSO Solo and Small Ensemble Concert: The Solo and Small Ensemble Concert took place at AMSO on March 25, 2022. The students had the opportunity to showcase their talents performing music of their choice for their families and friends.

News from ATA: Amity Transition Academy-Albertus Magnus campus hosted the winter basketball tournament at Albertus Magnus College. Amity Transition Academy-UNH, Milford Public Schools, Hamden Transition Academy, and North Branford Public Schools all participated in the two hour event. A special thank you to Tricia Fitzgerald and Alyssa Kopjanski for planning the event and to our partners at Albertus Magnus College. The ability for our students to access their athletic training facilities is greatly appreciated!

SAILS and **Spartan Prep Updates:** Students in the 7-8 SAILS program participated in a community outing to a local store and restaurant. Students use this opportunity to work on their financial literacy, socialization, and daily living skills. Students and staff in the 7-8 Spartan Prep program are continuing their work towards running a small dog treat business. This allows students to work on key academic skills through a real-world application.

Instructional Meetings: Curriculum Articulation meetings held in the last month included Reading. Additionally, the consultant for Reader's Workshop, Maggie Roberts, spent a day coaching and modeling the Reader's Workshop implementation at our middle schools. District meetings held this past month include District Steering and the BOWA Portrait of the Graduate committee.

Steam Day Returns: Back from a two-year hiatus, the Amity STEAM Day is making its return for a fifth year on Wednesday, June 1, 2022. All Bethany, Orange, and Woodbridge fifth grade students are invited to attend this wonderful day and actively engage in Science, Technology, Engineering, the Arts, and Mathematics activities.

Resources

Joint PTSO Meeting: There will be a joint PTSO meeting on April 21, 2022 at 6:00pm in the District Presentation Room. A presentation on the 2022-2023 BOE Proposed Budget will be shared with parents, teachers, and students from ARHS, AMSB, and AMSO. An option to attend virtually through the ARHS PTSO will also be provided.

IPPF Finals Invite: Members of the ARHS Debate Team have advanced to the "Elite 8" round of the 2021-22 Brewer Foundation/New York University International Public Policy Forum! Our team is now invited to compete in oral debates in New York City during IPPF Finals Weekend, April 29-May 1, 2022. This is an all-expense paid trip to the city and an amazing opportunity for our ARHS students.

Pupil Services Professional Learning: Jaime Guthrie, Pupil Services and Title IX Coordinator, continued her professional learning in the area of Title IX and School Expulsions through a webinar presented by Pullman and Comley, LLC. Tom Brant, Pupil Services Director, participated in a three day Regional Leadership Meeting focused on Multicultural Organizational Development (MCOD)--Looking Through an Equity Lens into the Heart of your Organization's Operations and Strategic Initiatives. Mr. Brant was joined at the leadership meetings by over 200 educators from across the United States and Puerto Rico.

Climate

ARHS Support of Ukraine: The ARHS Community continues to bring awareness to the crisis in Ukraine not only through in-school fundraising (as mentioned by our student representatives last month), but also through Spartan Seminar. The focus of the March 30th Spartan Seminar was stories of courage from Ukraine and the reminder that, in the face of seemingly insurmountable odds, we all have the potential for resilience and strength.

Support of Ramadan Observation: As part of our continuous effort to support our students and school community, those students who are observing Ramadan are offered an alternative setting during their scheduled lunch times (library or career center). Teachers have also been reminded to be cognizant of students who may have familial or religious commitments during this month of observance.

"Say Something" Program: On March 22, 2022, students from both AMSB and AMSO participated in a virtual program presented by Sandy Hook Promise. The "Say Something" program teaches youths and teens, grades 6-12, how to recognize signs & signals - especially on social media - from individuals who may want to hurt themselves or others. "Say Something" also teaches students how and why to go to a trusted adult to get help. This was a live presentation with students from both middle schools participating simultaneously.

AMSB School-Wide Field Trip: AMSB is taking a school-wide field trip on April 5, 2022 to watch a Bridgeport Islanders hockey game and support their peers, the AMSB choir students, who will be singing *God Bless America* at the opening of the game.

AMSO Messages of Support: AMSO students wrote messages of support for the people of the Ukraine and for the members of our community who have family members in the Ukraine. The activity facilitated conversation around the conflict in social studies classes.

Spartan Academy Makes the News: Congratulations to the staff and students of Spartan Academy which were featured on WFSB regarding the apiary program. The clip can be viewed here: https://www.wfsb.com/2022/03/21/bees-begin-pollinate/.

March Ticket Summary

Tickets addressed and closed: 52

Tickets open: 2

HS Student Help Desk

Students helped: 524

Amity Regional School District No. 5

25 Newton Road

Woodbridge, CT 06525 Phone: 203-397-4817

Fax: 203-397-4864

AMITY

Amity Regional School District No. 5

Technology Department Monthly Report

Completed Projects:

- Provided tech support for the SAT testing session
 - Ran a test session to identify any possible issues 2 weeks prior to actual test
 - Addressed issues that were found during test over the course of the following 2 weeks.
 - Actual SAT was successfully delivered via school-issued devices with very few issues during testing window.
- Pulled cable at the stadium to provide initial data for track timing systems in time for the start of the season. Full installation will be completed upon arrival of outdoor data closets.

Projects in process:

- Pulling wires and installing infrastructure for additional security cameras inside and outside of all three buildings; ongoing.
- The SwipeK12 classroom attendance system continues to receive major updates based on our requests as we continue to customize it to fit our specific needs.
- Working with Facilities and Building Admin to help plan for upgrades to both the Lecture Hall as well as the Presentation Room to better serve the District's needs moving forward.
- Working with Facilities to deploy an addition to our current Raptor software suite that will include drill management and integrated reunification capabilities.
- Exploring solutions to address the need for a mobile door access control system to allow security to answer and respond to requests for door access while away from their desk.

Upcoming projects:

- All weather stadium data and power installation:
 - Pulling data and fiber cable through new conduit.
 - Installing climate controlled, outdoor data closets under the visitor and home bleachers.
 - Installing data switches in the closets.
 - Completing infrastructure configuration to provide data and power access to multiple points on the field for use in timing systems, camera systems, future needs, etc.

March 2022

CLEAN

SAFE

HEALTHY

SCHOOLS

Amity Regional School District No. 5

Facilities Department Monthly Report

Completed Projects:

- The ARHS Track and Field projects are ready for signature on the Certificate of Completion. The Facilities Committee met with representatives of Classic Turf and Field Turf, as well as an outside consultant, to discuss the ongoing concerns and issues with the track surface retaining water. At the March 28th 2022 Facilities Committee, Amity and Field Turf agreed to monitor the track; and if by July 1, 2022 there are no signs of improvement, Field Turf will form a corrective action plan.
- A damaged light pole in the ARHS front parking lot was replaced by our in-house electrician and building maintainer.
- Our in-house electrician relocated and replaced a few receptacles in the Tech Ed. shop at ARHS to accommodate the new welding machines.
- A few clogged or broken toilets throughout the District were repaired by the building maintainer.
- Door and door lock repair/maintenance District-wide was completed by the building maintainer.

Projects in process:

- Facilities is preparing the contracts for trash removal, site-based grounds maintenance, and snow removal to go out for bid the first week of April.
- Reviewing the District's storage needs and options for the modular building in Bethany. Options have been discussed, and I will be receiving and reviewing the options this month.
- Roof restoration and repair at ARHS is wrapping up. The new sheet metal for the coping caps was ordered; and once weather improves, it will be installed.
- The acoustic panel project for both AMSO and AMSB is scheduled for April break. The panels are on site, and install is on schedule.
- The District hired Northeast Collaborative Architects to provide design options to remodel the lecture hall at ARHS as well as the outdoor classroom structures at all three schools. NCA is working on plans for review.
- The Town of Woodbridge Wetlands Commission approved our plans for culvert cleanout at their January 2022 meeting. Facilities is working on a schedule to address that work when the weather breaks.
- The DESIGO building management system software upgrade for ARHS is underway, scheduled to be finished by mid-May.



Amity Regional School District No. 5

Woodbridge, CT 06525

Phone: 203-397-4817

Fax: 203-397-4864

25 Newton Road

Outstanding issues to be addressed:

Outstanding issues to be addressed:

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 on 2022-2023 Amity Board of Education Operating Budget

Date: April 4, 2022

The Amity Board of Education will need to take action after the Public Hearing and set the Annual District Meeting date.

The recommended motion are shown below:

Amity Board of Education:

Move to set the District Annual Meeting Date for Monday, May 2, 2022 at 5:30 p.m. in the presentation room at Amity Regional High School and Referendum on Tuesday, May 3, 2022.

AMITY REGIONAL SCHOOL DISTRICT NO. 5

Bethany Orange Woodbridge 25 Newton Road, Woodbridge Connecticut 06525



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

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

To: Dr. Jennifer Byars, Superintendent of Schools

From: Theresa Lumas, Director of Finance and Administration

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

Date: March 21, 2022

1. Finance - Audit:

Mahoney Sabol & Company, LLP was appointed the District's auditor in 2017 based on the bid selection. The three-year contract was extended 2 years in 2020. The cost to the District for fiscal years 2018-2022 have been very stable, \$31,000 to the current price \$31,500. The proposed 3-year contract price is \$36,120 in year 1, \$37,220 in year 2, and \$38,420 in year 3. The price increase reflects the increase number of hours required to perform the audit. The proposal is attached. Michael VanDeventer, Partner, explained the driving factors:

- 1. <u>Federal Single Audit</u>: COVID related funding has been identified by the federal government to be "higher risk" programs. This will directly impact program determination, testing considerations, and documentation requirements, which will result in an increase in our costs.
- 2. <u>EFS Agreed Upon Procedures</u>: The CT Department of Education has increased the extent of their procedures. The new procedures require that we perform additional testing on the coding, classification and allocation of payroll and nonpayroll transactions by EFS location. Although these changes were effective last year, we did not increase our fees and absorbed those additional costs.

3. Financial Statement Audit:

a. We continue to experience significant increases in our employee costs (both wages and benefits). Wage increases have been driven by the market due to inflation and overall staffing shortages within the profession. We are committed to retaining our employees and to continue to provide the level of client service that our clients have become accustomed to and

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deserve. Although we continue to absorb a portion of the increases in our employee costs, it is having an impact on our billable hourly rates.

b. We will also be required to implement new auditing standards in fiscal year 2022. Most of the standards that will be implemented are not expected to have a significant impact on our costs. However, there is one standard that will require additional communications to be made in connection with our planning of the audit and that will also result in a change to our audit report. We expect that the implementation of this standard will result in an increase in our overall costs.

Mahoney, Sabol & Company, LLC did not increase their price for 3 years and then \$250 in year 4 and 5. Bid prices in 2017 ranged from \$24,800 to \$36,400. The District has benefited from quality service at an affordable price and given the reasons stated above; I am recommending we enter a 3-year contract with the option of a 2-year extension.

Amity Finance Committee:

Move to recommend the Amity Board of Education...

Amity Board of Education:

Move to ...

award a 3-year contract to Mahoney, Sabol & Company, LLC of Glastonbury, for auditing services. The proposed 3-year contract price is \$36,120 in year 1, \$37,220 in year 2, and \$38,420 in year 3, with an option to negotiate a 2-year extension.

2. Finance – Investment Consultant:

The District went out to bid for investment consultant services for advisement on the pension, OPEB, and sick and severance investment funds. Two consulting firms submitted proposals. Our current advisor, Fiducient Advisors submitted a 3-year proposal of \$22,500, \$23,175, and \$23,870. Their fee has been relatively flat for 8 years. We have paid \$18,000 - \$19,000 per year since 2014. Fiducient Advisors has a sizeable group of employees, over 80, as well as a large municipal and school client base. The other bidder submitted a proposal on basis points which equates to approximately \$75,050 each year. My recommendation is to stay with Fiducient Advisors.

Amity Finance Committee:

Move to recommend the Amity Board of Education...

Amity Board of Education:

Move to ...

award a 3-year contract, to Fiducient Advisors of Glastonbury for investment consulting services. The proposed 3-year contract price is \$22,500 in year 1, \$23,175 in year 2, and \$23,870 in year 3, with an option to negotiate a 2-year extension.

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		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2020-2021	2021-2022	FEB 22	CHANGE	MAR 22	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
1	MEMBER TOWN ALLOCATIONS	49,760,789	50,495,237	50,495,237	0	50,495,237	0	FAV
2	OTHER REVENUE	155,137	136,871	123,468	0	123,468	(13,403)	UNF
3	OTHER STATE GRANTS	1,081,353	1,025,301	802,280	0	802,280	(223,021)	UNF
4	MISCELLANEOUS INCOME	23,374	40,798	35,593	0	35,593	(5,205)	UNF
5	BUILDING RENOVATION GRANTS	0	0	0	0	0	0	FAV
6	TOTAL REVENUES	51,020,653	51,698,207	51,456,578	0	51,456,578	(241,629)	UNF
7	SALARIES	26,973,879	28,036,821	27,625,917	(100,205)	27,525,712	(511,109)	FAV
8	BENEFITS	4,801,671	5,597,784	5,550,344	(3,927)	5,546,417	(51,367)	FAV
9	PURCHASED SERVICES	8,483,699	9,758,800	9,475,578	8,118	9,483,696	(275,104)	FAV
10	DEBT SERVICE	4,453,835	4,453,835	4,453,835	0	4,453,835	0	FAV
11	SUPPLIES (INCLUDING UTILITIES)	2,583,319	3,218,072	3,233,118	2,000	3,235,118	17,046	UNF
12	EQUIPMENT	320,427	54,348	72,956	18,370	91,326	36,978	UNF
13	IMPROVEMENTS / CONTINGENCY	331,379	404,500	371,646	(10,470)	361,176	(43,324)	FAV
14	DUES AND FEES	80,852	174,047	156,203	0	156,203	(17,844)	FAV
15	TRANSFER ACCOUNT	507,844	0	516,981	0	516,981	516,981	UNF
16	TOTAL EXPENDITURES	48,536,905	51,698,207	51,456,578	(86,114)	51,370,464	(327,743)	FAV
17	SUBTOTAL	2,483,748	0	0	86,114	86,114	86,114	FAV
18	PLUS: CANCELLATION OF PRIOR YEAR'S ENCUMBRANCES	352,364	0	0	0	0	0	FAV
19	DESIGNATED FOR SUBSEQUENT YEAR'S BUDGET:	0	0	0	0	0	0	FAV
20	NET BALANCE / (DEFICIT)	2,836,112	0	0	86,114	86,114	86,114	FAV

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

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		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2020-2021	2021-2022	FEB 22	CHANGE	MAR 22	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
1	BETHANY ALLOCATION	9,000,731	8,983,608	8,983,608	0	8,983,608	0	FAV
2	ORANGE ALLOCATION	25,003,802	25,236,005	25,236,005	0	25,236,005	0	FAV
3	WOODBRIDGE ALLOCATION	15,756,256	16,275,624	16,275,624	0	16,275,624	0	FAV
4	MEMBER TOWN ALLOCATIONS	49,760,789	50,495,237	50,495,237	0	50,495,237	0	FAV
5	ADULT EDUCATION	4,286	3,042	3,042	0	3.042	0	FAV
6	PARKING INCOME	25,045	32,000	30,892	0	30,892	(1,108)	UNF
7	INVESTMENT INCOME	3.338	7.500	1.000	0	1.000	(6,500)	UNF
8	ATHLETICS	0	25,000	25,000	0	25,000	0	FAV
9	TUITION REVENUE	102.968	43.329	44.034	0	44.034	705	FAV
10	TRANSPORTATION INCOME	19,500	26,000	19,500	0	19,500	(6,500)	UNF
11	TRANSPORTATION BOWA AGREEMENT	0	0	0	0	0	0	FAV
12	OTHER REVENUE	155,137	136,871	123,468	0	123,468	(13,403)	UNF
13	OTHER STATE GRANT	0	0	0	0	0	0	FAV
14	SPECIAL EDUCATION GRANTS	1.081.353	1,025,301	802.280	0	802.280	(223,021)	UNF
15	OTHER STATE GRANTS	1,081,353	1,025,301	802,280	0	802,280	(223,021)	UNF
16	RENTAL INCOME	25	18,000	13,000	0	13,000	(5,000)	UNF
17	INTERGOVERNMENTAL REVENUE	4,797	4,798	4,893	0	4,893	95	FAV
18	OTHER REVENUE	18,552	18,000	17,700	0	17,700	(300)	UNF
19	TRANSFER IN	0	0	0	0	0	0	FAV
20	MISCELLANEOUS INCOME	23,374	40,798	35,593	0	35,593	(5,205)	UNF
21	BUILDING RENOVATION GRANTS	0	0	0	0	0	0	FAV
22	TOTAL REVENUES	51,020,653	51,698,207	51,456,578	0	51,456,578	(241,629)	UNF

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

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		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2020-2021	2021-2022	FEB 22	CHANGE	MAR 22	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
1	5111-CERTIFIED SALARIES	22,041,070	22,915,344	22,551,725	(38,951)	22,512,774	(402,570)	FAV
2	5112-CLASSIFIED SALARIES	4,932,809	5,121,477	5,074,192	(61,254)	5,012,938	(108,539)	FAV
3	SALARIES	26.973.879	28.036.821	27,625,917	(100,205)	27.525.712	(511,109)	FAV
4	5200-MEDICARE - ER	369.840	407.811	407.811	0	407.811	0	FAV
5	5210-FICA - ER	300,649	311.405	311,405	0	311,405	0	FAV
6	5220-WORKERS' COMPENSATION	205,308	214.297	152.164	0	152.164	(62,133)	FAV
7	5255-MEDICAL & DENTAL INSURANCE	2,913,911	3,675,704	3,693,418	0	3,693,418	17,714	UNF
8	5860-OPEB TRUST	31,678	0	0	0	0	0	FAV
9	5260-LIFE INSURANCE	44,550	49,918	52,535	(3,927)	48,608	(1,310)	FAV
10	5275-DISABILITY INSURANCE	10,765	11.136	11.898	0	11,898	762	UNF
11	5280-PENSION PLAN - CLASSIFIED	790.234	764.395	764.395	0	764.395	0	FAV
12	5281-DEFINED CONTRIBUTION RETIREMENT PLAN	121.217	148,418	148,418	0	148,418	0	FAV
12	5282-RETIREMENT SICK LEAVE - CERT	0	0	0	0	0	0	FAV
13	5283-RETIREMENT SICK LEAVE - CLASS	0	0	0	0	0	0	FAV
14	5284-SEVERANCE PAY - CERTIFIED	0	0	0	0	0	0	FAV
15	5290-UNEMPLOYMENT COMPENSATION	12,131	12,500	6,100	0	6,100	(6,400)	FAV
16	5291-CLOTHING ALLOWANCE	1,388	2,200	2,200	0	2,200	0	FAV
17	BENEFITS	4,801,671	5,597,784	5,550,344	(3,927)	5,546,417	(51,367)	FAV
18	5322-INSTRUCTIONAL PROG IMPROVEMENT	37,973	26,600	26,600	0	26,600	0	FAV
19	5327-DATA PROCESSING	99,936	114,785	114,785	0	114,785	0	FAV
20	5330-PROFESSIONAL & TECHNICAL SRVC	1,657,059	1,749,530	1,870,725	35,000	1,905,725	156,195	UNF
21	5440-RENTALS - LAND, BLDG, EQUIPMENT	99,809	122,685	105,589	(7,000)	98,589	(24,096)	FAV
22	5510-PUPIL TRANSPORTATION	2,874,413	3,655,436	3,641,159	7,000	3,648,159	(7,277)	FAV
23	5521-GENERAL LIABILITY INSURANCE	255,503	249,650	264,839	0	264,839	15,189	UNF
24	5550-COMMUNICATIONS: TEL, POST, ETC.	88,161	114,356	106,147	0	106,147	(8,209)	FAV
25	5560-TUITION EXPENSE	3,206,118	3,638,655	3,263,631	(26,882)	3,236,749	(401,906)	FAV
26	5590-OTHER PURCHASED SERVICES	164,727	87,103	82,103	0	82,103	(5,000)	FAV
27	PURCHASED SERVICES	8,483,699	9,758,800	9,475,578	8,118	9,483,696	(275,104)	FAV

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

		COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6	COL 7
		2020-2021	2021-2022	FEB 22	CHANGE	MAR 22	VARIANCE	FAV
LINE	CATEGORY	ACTUAL	BUDGET	FORECAST	INCR./(DECR.)	FORECAST	OVER/(UNDER)	UNF
28	5830-INTEREST	788,835	788,835	788,835	0	788,835	0	FAV
29	5910-REDEMPTION OF PRINCIPAL	3,665,000	3,665,000	3,665,000	0	3,665,000	0	FAV
30	DEBT SERVICE	4,453,835	4,453,835	4,453,835	0	4,453,835	0	FAV
31	5410-UTILITIES, EXCLUDING HEAT	616,751	725,065	725,865	(10,000)	715,865	(9,200)	FAV
32	5420-REPAIRS, MAINTENANCE & CLEANING	764,059	747,751	761,997	0	761,997	14,246	UNF
33	5611-INSTRUCTIONAL SUPPLIES	244,344	369,883	369,883	0	369,883	0	FAV
34	5613-MAINTENANCE/CUSTODIAL SUPPLIES	159,130	246,698	246,698	0	246,698	0	FAV
35	5620-OIL USED FOR HEATING	49,787	42,500	42,500	0	42,500	0	FAV
36	5621-NATURAL GAS	41,929	68,171	68,171	12,000	80,171	12,000	UNF
37	5627-TRANSPORTATION SUPPLIES	93,802	122,016	122,016	0	122,016	0	FAV
38	5641-TEXTS & DIGITAL RESOURCES	68,322	243,902	243,902	0	243,902	0	FAV
39	5642-LIBRARY BOOKS & PERIODICALS	19,390	20,215	20,215	0	20,215	0	FAV
40	5690-OTHER SUPPLIES	525,805	631,871	631,871	0	631,871	0	FAV
41	SUPPLIES (INCLUDING UTILITIES)	2,583,319	3,218,072	3,233,118	2,000	3,235,118	17,046	UNF
42	5730-EQUIPMENT - NEW	182,811	49,348	54,348	18,370	72,718	23,370	UNF
43	5731-EQUIPMENT - REPLACEMENT	137,616	5,000	18,608	0	18,608	13,608	UNF
44	EQUIPMENT	320,427	54,348	72,956	18,370	91,326	36,978	UNF
45	5715-IMPROVEMENTS TO BUILDING	326,379	65.000	53,000	0	53,000	(12,000)	FAV
45a	5715-FACILITIES CONTINGENCY	100,000	100,000	100,000	0	100,000	0	FAV
45b	TRSF. FROM FACILITIES CONTINGENCY	(100,000)	0	(32,854)	0	(32,854)	(32,854)	FAV
46	5720-IMPROVEMENTS TO SITES	5,000	89,500	101,500	0	101,500	12,000	UNF
47	5850-DISTRICT CONTINGENCY	150,000	150,000	150,000	0	150,000	0	FAV
47a	TRSF. FROM CONTINGENCY TO OTHER ACCTS.	(150,000)	0	0	(10,470)	(10,470)	(10,470)	FAV
48	IMPROVEMENTS / CONTINGENCY	331,379	404,500	371,646	(10,470)	361,176	(43,324)	FAV
49	5580-STAFF TRAVEL	3,135	23,850	15,006	0	15,006	(8,844)	FAV
50	5581-TRAVEL - CONFERENCES	14,472	44,800	35,800	0	35,800	(9,000)	FAV
51	5810-DUES & FEES	63,245	105,397	105,397	0	105,397	0	FAV
52	DUES AND FEES	80,852	174,047	156,203	0	156,203	(17,844)	FAV
53	5856-TRANSFER ACCOUNT	507,844	0	516,981	0	516,981	516,981	UNF
54	ESTIMATED UNSPENT BUDGETS		0	0	0	0	0	FAV
55	TOTAL EXPENDITURES	48,536,905	51,698,207	51,456,578	(86,114)	51,370,464	(327,743)	FAV

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 2020-2021



MARCH 2022

2021-2022 FORECAST

OVERVIEW

The projected unspent fund balance for this fiscal year is \$86,114 FAV previously, \$0 FAV, which appears on page 1, column 6, and line 20. This amount now reflects \$516,981, previously, \$386,874 of a possible \$516,981 or 1% of the surplus as an end-of-year transfer. The \$516,981 appropriation to the capital and non-recurring account is shown on line 53 of the Excel file. The District is legally allowed to transfer with Board approval up to 2% or \$1,033,963 of the current budget. The item will be presented after the final balance for FY22 is confirmed at the August 2022 meeting.

REVENUES BY CATEGORY

The projected yearend balance of revenues is \$241,629 UNF, previously, \$241,629 UNF, which appears on page 2, column 6, line 22.

LINE 5 on Page 2: ADULT EDUCATION:

The forecast is based on historical State payments.

LINE 6 on Page 2: PARKING INCOME:

The forecast is \$1,108 UNF, previously \$1,108 UNF compared to budget.

LINE 7 on Page 2: INVESTMENT INCOME:

The budget is based on the expectation that interest rates will remain low and revenue will not meet budget, \$6,500 UNF, previously \$6,500 UNF.

	State Treasurer's
Peoples United	Investment Fund
.398%	.10%
.398%	.10%
.398%	.09%
.398%	.09%
.398%	.09%
.398%	.09%
.398%	.10%
.398%	.12%
.397%	.12%
	.398% .398% .398% .398% .398% .398% .398%

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LINE 8 on Page 2: ATHLETICS:

The forecast is based on budget.

LINE 9 on Page 2: TUITION REVENUE:

The budget is based on three tuition students, one at a reduced employee rate. The actual tuition charged is higher (\$574 per year) than budgeted since the rate is set after the budget referendum is past. One tuition student has enrolled in the District since last month. *The projected variance is \$705 FAV*, *previously \$705 FAV*.

LINE 10 on Page 2: TRANSPORTATION INCOME:

The forecast is based on projected State payments and enrollment for magnet school transportation budgeted. *The actual transportation cost is \$19,500 which is \$6,500 UNF*.

LINE 14 on Page 2: SPECIAL EDUCATION GRANTS:

The current projection is based on budgeted costs for placements and transportation. The budget assumes a 73% reimbursement rate. The end of year report for fiscal year 2021 was filed on September 1, 2021. This data submitted reports the final cost for high cost students. The State made its final payment to the District in May based on the March data. The State will adjust the payment for the current fiscal year based on any variances between the March report and the end of year report. There were significant changes in student placements after March 1st. It was noted in the forecast for fiscal year 2021 that we would receive additional funds that would not be "returned" to the State until this year. The additional funds were part of the surplus in the fiscal year 2021 end of year report. The forecast reflects that \$102,419 UNF will be reduced from our current year grant to align with the end of year report. The current reimbursement for students is down \$120,602 UNF, previously, \$148,478 UNF based on current student placements. The total for this line is \$223,021 UNF, previously, \$223,021 UNF. The budget expenditures will need to be reduced to cover this shortfall.

LINE 16 on Page 2: RENTAL INCOME:

The forecast is estimated to be \$5,000 UNF based on actual rentals year-to-date.

LINE 17 on Page 2: INTERGOVERNMENTAL INCOME:

The forecast is \$95 FAV for shared services with the Woodbridge Board of Education for technology services.

LINE 18 on Page 2: OTHER REVENUE:

The forecast is \$300 UNF.

EXPENDITURES BY CATEGORY

The projected yearend balance of expenditures is \$327,743 FAV, previously \$235,629 FAV which appears on page 4, column 6, line 55.

LINE 1 on Page 3: 5111-CERTIFIED SALARIES:

The forecast is based on budget. There are still open positions and the forecast will be updated after the school year begins. There were 5 retirements at the end of fiscal year 2020. Fewer retirements were known during the budget process and therefore expected in 2021. Two staff members were budgeted to retire. To date 7 have retired and 7 have resigned. There is a favorable turnover variance of \$253,876 FAV, previously \$216,805 FAV in the forecast. Additional savings are forecasted from a mid-year retirement that may not be filled until July. An estimated number of stipend positions for clubs and activities are vacant, \$12,878 FAV, coverage costs are expected to be \$72,322 UNF based on YTD costs, total for the certified salary line is \$402,570 FAV, previously \$363,619 FAV. There are unpaid LOAs and several vacancies. One of the long-term absences will require a transfer to cover the services of a temporary replacement on the professional technical line.

LINE 2 on Page 3: 5112-CLASSIFIED SALARIES:

The forecast is based on budget. There are still open positions and the forecast will be updated after the school year begins. There are 7 retirements which is unusually high for classified staff. The forecast is \$108,539 FAV, previously, \$47,285 favorable. Substitutes costs are higher than budgeted due to the higher turnover and vacant positions. Unpaid leaves of absences \$15,673 FAV, unfilled paraeducators position (no applicants) \$13,039 FAV, and \$25,280 FAV for student help desk which has a smaller pool of students and later start in the school year than budgeted.

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

The forecast is based on the budget.

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

The workers' compensation premium is less than budgeted and the forecast assumes the payroll audit will be as budgeted. Member equity distribution was received for \$23,129 FAV. The renewal policy is \$39,004 FAV less than budgeted. We are provided the maximum premium number during the fiscal year and at the time of renewal, July 1, the final premium is calculated. Total savings YTD \$62,133 FAV, previously \$62,133 FAV.

LINES 7 on Page 3: 5255-MEDICAL AND DENTAL INSURANCE:

The following charts are included to track how the District's actual claims are comparing against the expected claims. How claims are running for the year has always been a common question, so the charts for claims and fees are shown monthly. However, claims are one piece of the medical budget line shown in the Excel file. Fees, employee contributions, grant funding, employer contributions to employee HSA accounts and reserve funding are other factors built into the Medical and Dental Insurance Budget. The claims chart in the Word document will not equal the Excel line since it is only one factor of the data comprising the medical budget. Certainly 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 \$17,714 UNF (average 8 month overage) the budget, previously \$17,714. The projected monthly budget is based on an average of five years of claims. There is no change from last month as March data is not available due to the early meeting date.

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CLAIMS OF CURRENT EMPLOYEES AND RETIREES

	2	2021-2022		021-2022			2	020-2021	2	2019-2020
MONTH	NTH ACTUAL		BUDGET		VA	VARIANCE		ACTUAL	A	ACTUAL
JUL	\$	530,877	\$	369,954	\$	160,923	\$	256,509	\$	366,182
AUG	\$	405,635	\$	426,870	\$	(21,235)	\$	200,490	\$	383,765
SEP	\$	364,327	\$	363,929	\$	398	\$	292,575	\$	317,685
OCT	\$	341,109	\$	361,074	\$	(19,965)	\$	293,360	\$	383,369
NOV	\$	324,557	\$	464,671	\$	(140,114)	\$	409,279	\$	370,672
DEC	\$	767,843	\$	507,134	\$	260,709	\$	489,999	\$	403,126
JAN	\$	320,277	\$	325,625	\$	(5,348)	\$	253,077	\$	348,820
FEB	\$	176,127	\$	312,242	\$	(136,115)	\$	259,775	\$	124,317
MAR	\$	366,860	\$	366,860	\$	-	\$	255,965	\$	276,832
APR	\$	303,014	\$	303,014	\$	-	\$	304,485	\$	196,735
MAY	\$	379,181	\$	379,181	\$	-	\$	235,252	\$	124,900
JUN	\$	318,269	\$	318,269	\$	-	\$	274,741	\$	194,428
TOTALS	\$	4,598,076	\$	4,498,824	\$	99,252	\$	3,525,507	\$	3,490,831

ACTUAL/FORECAST CLAIMS AS A PERCENTAGE OF EXPECTED CLAIMS

2017-2018	2018-2019	2019-2020	2020-2021	2021-2022
ACTUAL	ACTUAL	ACTUAL	ACTUAL	FORECAST
72.1%	92.2%	84.1%	75.8%	102.2%

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

	20	021-2022	20)21-2022			20	020-2021	20	019-2020
MONTH	ACTUAL		BUDGET		VARIANCE		ACTUAL		A	CTUAL
JUL	\$	14,068	\$	49,997	\$	(35,929)	\$	53,562	\$	65,692
AUG	\$	74,642	\$	53,423	\$	21,219	\$	50,187	\$	62,661
SEP	\$	46,923	\$	45,088	\$	1,835	\$	53,804	\$	46,306
OCT	\$	47,049	\$	51,048	\$	(3,999)	\$	55,100	\$	70,245
NOV	\$	39,556	\$	42,200	\$	(2,644)	\$	56,242	\$	59,406
DEC	\$	51,770	\$	39,812	\$	11,958	\$	55,608	\$	62,365
JAN	\$	48,349	\$	36,118	\$	12,231	\$	11,403	\$	73,157
FEB	\$	81,821	\$	44,037	\$	37,784	\$	94,489	\$	57,592
MAR	\$	38,241	\$	38,241	\$	-	\$	80,240	\$	58,624
APR	\$	38,834	\$	38,834	\$	-	\$	54,687	\$	57,573
MAY	\$	40,369	\$	40,369	\$	-	\$	59,398	\$	56,459
JUN	\$	36,858	\$	36,858	\$	-	\$	50,341	\$	56,502
TOTALS	\$	558,479	\$	516,024	\$	42,455	\$	675,061	\$	726,582

LINE 9 on Page 3: 5260-LIFE INSURANCE:

The forecast reflects \$1,310 FAV previously, \$2,617 UNF based on actual staff.

LINE 10 on Page 3: 5275-DISABILITY INSURANCE:

The forecast reflects \$762 UNF, previously \$762 UNF.

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

The forecast is based on budget.

LINE 15 on Page 3: 5290-UNEMPLOYMENT:

The forecast is based on actual charges, \$6,400 FAV, previously \$6,400 FAV. There are no anticipated unemployment claims for the remainder of the year.

LINE 20 on Page 3: 5330-PROFESSIONAL TECHNICAL SERVICES:

The forecast projects the legal budget will be \$156,195 UNF, previously \$121,195 UNF. A long-term temporary replacement is contracted to cover an extended leave of absence and additional BCBA and behavioral therapist services are required to meet the needs of our students. Transfers were approved in January. The Director of Special Education has requested a transfer to cover unfilled paraeducators positions. This transfer covers the fees associated with contracting with an agency to provide paraprofessional support in absence of ARSD being able to hire our own paraprofessional. This transfer utilizes unspent paraprofessional funds due to open and unfilled positions.

LINE 21on Page 3: 5440-RENTALS:

The forecast is \$24,096 FAV, previously \$17,096 FAV. The arrangement with University of New Haven (UNH) was expected to cost \$15,000 but the UNH waived all fees to partner with Amity staff and students. A \$7,000 transfer is requested to move funds for van rentals for athletics to transportation. Rental vans are not currently available.

LINE 22 on Page 3: 5510-PUPIL TRANSPORTATION:

Special Education Transportation is projected to be \$7,277 FAV, previously \$14,277 FAV, based on current student placements. A transfer is requested to move funds for van rentals for athletics to transportation. Rental vans are not currently available.

LINE 23 on Page 3: 5521-GENERAL LIABILITY INSURANCE: Various liability policies, including medical professional, Student Accident insurance and cyberinsurance renewed higher than budgeted-\$15,189 UNF.

LINE 24 on Page 3: 5550-COMMUNICATION: TEL, POST, ETC:

E-Rate funding is approved for the current fiscal year. The District will receive discounted invoices for the CEN service provided by the State of Connecticut. The District will save \$16,605 FAV. An onboarding software was purchased to digitize hiring forms for \$8,396 UNF. *The account is projected to be \$8,209 FAV previously \$8,209 FAV*.

LINE 25 on Page 3: 5560-TUITION EXPENSE:

Tuition is currently forecasted to have a \$401,906 FAV previously \$375,024 FAV variance. The forecast is based on current students and their placements.

Tuition for the vo-ag schools has a projected variance of \$30,067 FAV previously, \$30,067 FAV.

	FY17-18	FY18-19	FY19-20	FY20-21	FY21-22	FY21-22
	ACTUAL	ACTUAL	ACTUAL	ACTUAL	BUDGET	FORECAST
Sound	4	6	6	5	6	3(3)
Trumbull	6	4	4	3	3	1(1)
Nonnewaug	4	6	5	7	7	9(9)
Common						
Ground						
Charter HS	0	0	0	1	1	1(1)
Betsy Ross						
Magnet	0	0	0	0	1	0(0)
Wintergreen						
Magnet						
	0	0	0	0	0	1(1)
Engineering						
Science						
Magnet	1	0	0	0	0	0
Highville						
Charter			0	0	0	0
School	1	0				
Totals	16	16	15	16	18	15(15)

ECA has a projected variance of \$11,360 FAV, with two less students enrolled than budgeted.

	FY17-18	FY18-19	FY19-20	FY20-21	FY21-22	FY21-22
	ACTUAL	ACTUAL	ACTUAL	ACTUAL	BUDGET	FORECAST
ECA	19	24	21	16	20	18(18)

Public (ACES) and private out-of-district placements are currently less than anticipated, \$360,479 FAV, previously \$333,597 FAV. There are more outplaced students who recently returned back to District in-house programs or moved out of the District.

	FY17-18	FY18-19	FY19-20	FY20-21	FY21-22	FY21-22
	ACTUAL	ACTUAL	ACTUAL	ACTUAL	BUDGET	FORECAST
Public						
SPED	8	11	8	6	14	10(10)
Private						
SPED	20	22	18	27	25	23(24)
Totals	28	33	26	33	39	33(34)

LINE 26 on Page 3: 5590-OTHER PURCHASED SERVICES:

The forecast estimates expenditures will be under budget, \$5,000 FAV.

LINE 31 on Page 4: 5410-UTILITIES, EXCLUDING HEAT:

The 2021-2022 budget for electricity assumes the use of 3,189,868 kilowatt hours at an average price of 0.20037 or a cost of \$639,169. *Forecast is \$10,000 FAV, previously neutral.*

The budget assumes there will not be a Load Shed credit.

The budget for propane is \$3,546. The forecast is projected to be \$800 UNF.

The budget for water is \$57,350. *The forecast is projected to be neutral.*

Sewer costs are budgeted at \$25,000. The forecast is projected to be neutral

ELECTRICITY (KILOWATT HOURS)

MONTH	2021-2022 FORECAST	2021-2022 BUDGET	VARIANCE	2020-2021 ACTUAL	2019-2020 ACTUAL
JUL	296,292	253,660	42,632	254,686	306,744
AUG	321,023	287,736	33,287	299,439	298,187
SEP	314,756	303,777	10,979	285,993	255,198
OCT	272,755	282,968	(10,213)	248,089	294,827
NOV	256,208	262,230	(6,022)	238,583	243,754
DEC	259,994	263,699	(3,705)	240,912	250,944
JAN	257,539	273,187	(15,648)	249,595	266,227
FEB	271,979	268,924	3,055	243,774	251,802
MAR	255,252	255,252	-	246,886	217,683
APR	265,084	265,084	-	254,711	232,983
MAY	243,404	243,404	-	244,685	145,568
JUN	229,947	229,947	-	290,054	239,032
Totals	3,244,233	3,189,868	54,365	3,097,407	3,002,949

Note: 2019-2020 Actual Kilowatt Hours during COVID shutdown shown in bold italics.

DEGREE DAYS

There are 3,363 degree days to date compared to 3,580 last year at this time.

LINE 32 on Page 4: 5420-REPAIRS & MAINTENANCE: The forecast is projected to be \$14,246 UNF, previously \$14,246 UNF A budget transfer was approved in October to cover an emergency replacement of a failed building control system at Amity Middle School –Orange and to schedule replace for Amity Middle School –Bethany. Snow removal is expected to by overbudget by \$10,000 UNF.

LINE 35 & 36 on Page 4: 5620 & 5621-OIL & NATURAL GAS:

The budget for natural gas is \$68,171 and the budget for oil is \$41,000. The forecast is projects natural gas to be \$12,000 UNF, previously neutral.

LINE 43 on Page 4: 5731-EQUIPMENT -REPLACEMENT:

The facilities department requested an auto scrubber to replace aging equipment that is not fully operational and costly to repair, \$6,854 UNF and the cafeterias need new computers

to run updated software, \$11,754 UNF. *The account is \$13,608 UNF, previously \$13,608 UNF*

LINE 45a on Page 4: 5850-FACILITIES CONTINGENCY:

The budget includes a \$100,000 contingency for unplanned, necessary facility expenditures. The forecast assumes these funds will be entirely used. A budget transfer was approved in October to cover an emergency replacement of a failed building control system at Amity Middle School –Orange and to schedule replace for Amity Middle School –Bethany. A budget transfer was approved in February for an auto scrubber. The current balance is \$67,146, previously \$67,146 FAV. If these funds are available in June, the Administration will request a transfer to Improvements of Sites to subsidize the construction of the outdoor classrooms.

LINE 47 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. The Board approved \$10,470 for vape sensors in November. The balance in contingency is \$132,730 FAV. If these funds are available in June, the Administration will request a transfer to Improvements of Sites to subsidize the construction of the outdoor classrooms.

LINES 49 & 50 on Page 4: 5580 & 5581-STAFF TRAVEL/CONFERENCES:

The forecast assumes these funds will be not be entirely used due to more conferences remaining virtual. Virtual conferences avoid travel costs for staff and some conferences are priced lower for virtual presentations. Forecast is \$17,844 FAV, previously nuetral.

LINE 53 on Page 4: 5856-TRANSFER:

The forecast includes 1%, \$516,981, previously \$516,981, of the estimated fund balance will be appropriated to the capital non-recurring account. The District is legally allowed to transfer with Board approval up to 2% or \$1,033,963 of the current budget. The item will be presented after the final balance for the FY21 is confirmed at the August 2022 meeting.

COVID ACCOUNTS:

Year to date, the District has committed \$35,867 which is \$8,672 UNF, previously \$5,599 UNF to purchases related to operating safely during the pandemic. We are once again seeking FEMA funds for the eligible purchases. FEMA has recently changed the eligibility criteria so an application will be submitted soon.

Other grant funding is listed below by fiscal year. Many of these grants required meeting needs that are not budgeted or in response to newly identified needs steming from the pandemic.

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GRANT	FY21		FY22		FY23		FY24		TOTAL	
ESSER I	\$	55,040							\$	55,040
ESSER II			\$	48,678	\$	159,307	\$	36,037	\$	244,022
ESSER III			\$	181,212	\$	361,353			\$	542,565
Coronavirus Relief Funds	\$	240,120							\$	240,120
Special Education - COVID	\$	20,000							\$	20,000
Special Education IDEA- ARP					\$	94,631			\$	94,631
Special Education Recovery - ESSER II			\$	20,000	\$	20,000			\$	40,000
Special Education Dyslexia - ESSER II Bonus			\$	13,000					\$	13,000
Special Education Population - ESSER II Bonus					\$	25,000			\$	25,000
Special Education Stipend			\$	20,000					\$	20,000
Homeless ARP ESSER III pending			\$	3,000		•			\$	3,000
TOTAL	\$	315,160	\$	285,890	\$	660,291	\$	36,037	\$	1,297,378

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APPENDIX A

COST SAVINGS AND EFFICIENCIES FOR FISCAL YEAR 2021-2022

TOTAL ANNUAL SAVINGS TO-DATE OF: \$37,178

<u>\$10,732 Cable Advisory Grant:</u> One of the high school teachers, Jeremy Iverson, applied for and received a grant from Cable Advisory Grant. The grant is to be used to purchase production equipment for the film courses and production room. This reduces the amounts that would be funded through the general fund.

<u>\$18,446 E-Rate Credits</u>: The District's application for E-Rate credits is approved. The amount reflects discounted invoices for the CEN – state provided internet connection.

\$8,000 Facilities Repairs: A circulator pump for the boiler started leaking at the high school. In-house maintenance staff pulled the pump and sent it out to have it rebuilt. Once rebuilt, they reinstalled the pump. Cost for the rebuild was \$1,612. with a three year warranty. By pulling the pump and having it rebuilt, we saved potentially an estimated \$4,000 by not having a mechanical contractor called in.

In preparation for the HVAC BMS System upgrade at ARHS, a handful of air handling units needed an upgrade to the communication wiring in order to support the upgrade. Our in-house electrician and building mechanic ran the new wires and with the help of the IT department, terminated the connections to the units and field panels. Since this was not part of the upgrade, we would have had to pay for Siemens technicians to come in and run the wire. Potential savings again were an average \$4,000 factoring on the labor of two technicians for two days plus markup on material costs.

There is a detailed history of the District's efforts to save dollars and operate efficiently. This information is posted on the District's website:

- Energy Savings Initiatives for the past decade http://www.amityregion5.org/boe/sub-committees/finance-committe
- District recognized CQIA Innovation Prize for Fostering a District Culture of Maximizing Cost Savings and Efficiencies http://www.amityregion5.org/boe/sub-committees/finance-committee2
- Fiscal Year 2020-2021 \$128,708 https://www.amityregion5.org/boe/sub-committees/finance-committee
- Fiscal Year 2019-2020 \$43,497 https://www.amityregion5.org/boe/sub-committees/finance-committee
- Fiscal Year 2018-2019 \$52,451 https://www.amityregion5.org/boe/sub-committees/finance-committee
- Fiscal Year 2017-2018 \$746,688 https://www.amityregion5.org/boe/sub-committees/finance-committee
- Fiscal Year 2016-2017 \$595,302 http://www.amityregion5.org/boe/sub-committees/finance-committee
- Fiscal Year 2015-2016 \$125,911 http://www.amityregion5.org/boe/sub-committees/finance-committee
- Fiscal Year 2014-2015 \$139,721 http://www.amityregion5.org/boe/sub-committees/finance-committee

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APPENDIX B

MONTHLY FORECASTS: PURPOSE, METHODOLOGY, HISTORICAL

PURPOSE & METHODOLOGY:

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

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

The most recent two fiscal years were significantly impacted by the COVID-19 pandemic. School operations were halted or modified and not at 100% for either year. The District staff took many steps to reserve the general operating budget to meet the demands and brace for the unknown costs. Nearly one million dollars was held from accounts to prepare for operations in fiscal year 2021. Grant funding from State and Federal sources became available during the year. These funds were used to offset unexpected costs and plan for the future costs. Some of the funds do not expire until September 2024. The administration is planning to use funds as required by grant guidelines while limiting the impact to future budgets.

To illustrate, a special education student could move into the District in mid-year and the cost impact could be over \$100,000 and/or we could have a 'bad claims year' and wipe out the Self Insurance Reserve Fund and need other funds to cover claims of current employees and retirees. If we do not have available funds to cover these and other potential shortfalls, the necessity to seek additional funding from the public would be our only option (as only the towns have a fund balance from prior years available to use in the case of an emergency).

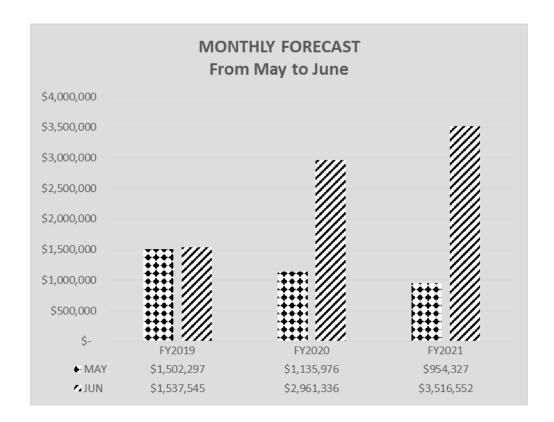
Revenues can be most impacted by decisions made at the State level for Special Education and Transportation grants. We have seen the reimbursement rate change in mid-year.

Prudent financial management is necessary. We need to be sure the total expenditures budget is never overspent (and may need to be underspent if revenues are below budget because total expenditures cannot exceed total revenues). It is imperative we 'hold back' on spending any of the Contingency Account until it is absolutely necessary or we are close to yearend. The Superintendent of Schools and Director of Finance and Administration review and approve or deny all purchase orders. We are careful to make sure funds are only spent when necessary and not just because 'it is in the budget'. We are constantly faced with the 'what-ifs' of over expenditures in certain accounts. We need to be sure there are sufficient funds available. As a result, the fund balance has been larger towards the end of the fiscal year.

Furthermore, the monthly forecasts are based on the information available. We have had large, unexpected or highly unpredictable events at the end of the fiscal year (mostly of a positive nature), which have significantly change 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.

FY2019:

The audited fund balance is \$2,033,027. The monthly forecast for May 2019 projected a fund balance of \$1,502,297 which included \$409,259 designated for security projects. The change is \$531,804 higher than the prior month's forecast. The major reasons for the significant increase in the yearend fund balance from one month to the next month were, as follows:

- \$57,653: Certified and classified salaries were lower than forecasted. It is not until the end of the fiscal year when we know the actual expenditures for coverages, substitutes, leaves of absences, overtime, and pay docks. Many unpaid leaves occur at the end of the school year. We use conservative estimates in the forecasts based on past history.
- \$137,507: Medical & dental claims were lower than expected. Since we are self-insured, actual claims are not known until the end of the fiscal year.

- \$150,147 Purchased services were lower than forecasted. There were fewer interns than budgeted. Less than anticipated need for psychiatric consults and other consultants at PPTs. Less need for printed materials, postage, changes in special education transportation and athletic rentals were less than anticipated.
- \$82,370: Fuel costs for busses were less than anticipated. Repairs and maintenance costs for accounts other than facilities were down. Instructional supplies were less than anticipated.

FY2020:

The audited fund balance is \$1,950,777 after \$515,077 in EOY purchases and allocation of 1% or \$492,485 appropriated to Capital and Nonrecurring Account. The monthly forecast for May 2020 projected a fund balance of \$1,135,976. The change is **\$815,982 higher than the prior month's forecast**. The major reasons for the significant increase in the yearend fund balance was the unsettled environment of the COVID-19 global pandemic. As of the May 2020 meeting, the Govenor had not announced if schools would reopen prior to the end of the school year. School was eventually cancelled for the remainder of the year and almost all accounts were impacted. The changes from one month to the next month were, as follows:

- \$121,462: Certified and classified salaries were lower due to the school closures. Spring coaches salaries were reduced, substitutes and coverages were not needed, staff development hours, homebound instruction, chaperone duties, and overtime were all near zero.
- \$296,642: Medical & dental claims were lower due to the COVID-19 global pandemic. Routine office visits and medical tests were postponed all spring across the region. Since we are self-insured, actual claims are not known until the end of the fiscal year. Unemployment claims, though high were lower than May's estimate. The District has not experienced claims of this magnitude and estimating the actual costs were difficult. Many claims were in dispute. The change was \$26,000 FAV.
- \$155,607 Purchased services were lower due to the COVID-19 global pandemic. There were no athletic contests, which reduced the annual number of game day staff and officials paid. Less need for printed materials, postage, end of year celebrations, gradutation and stepping up costs, and athletic rentals were less due to the social distancing requirements.
- \$76,091: Transportation and fuel costs for busses were lower due to the COVID-19 global pandemic. Contracts were renegotiated in May but with school cancellation final for the year, additional savings resulted. There were no late runs, athletic trips, or field trips at the end of the year.
- \$70,483: Instructional supplies were lower due to the COVID-19 global pandemic. Consumable materials could not be utilized in the remote learning environment so there was a significant decrease in food for culinary, lumber and other raw materials for technology education and science lab materials.

- \$54,739: Communication costs were lower due to the COVID-19 global pandemic. Less postage, copy paper, and catering needs due to the remote learning environment.
- \$35,521: Rentals for fields, tables, chairs, tents, etc. were lower due to the COVID-19 global pandemic. End of year athletic contests were cancelled and ceremonies were done in a socially distance manner which eliminated the need for many items used for large crowd gatherings.
- \$14,945: Electricity usage was lower due to the COVID-19 global pandemic. Buildings had a few occupants during the March through June timeframe.

FY2021:

The audited fund balance for 2020-2021 is \$2,483,748 after designating \$185,600 for items cut from the FY22 budget, \$339,360 for end of year purchases (security and technology) and \$507,844 proposed for capital nonrecurring account. The change is \$2,991,592 higher than the prior month's forecast. The major reasons for the significant increase in the yearend fund balance was the continuing unsettled environment of the COVID-19 global pandemic. The changes from one month to the next month are summarized as follows:

- \$609,645: Medical & dental claims were lower and the assumption is it is due to the COVID-19 global pandemic. Routine office visits and medical tests may not have resumed to normal levels. Since we are self-insured, actual claims are not known until the end of the fiscal year.
- \$260,880 Purchased services were lower due to the COVID-19 global pandemic. There were fewer athletic contests, which reduced the annual number of game day staff and officials paid. Less costs were incurred for special education than anticipated.
- \$147,390: Transportation and fuel costs for busses were lower due to the COVID-19 global pandemic. There were no field trips or late runs during the year. As the schools edged toward operating at 100% it was difficult to predicate if transportation needs would increase in May and June. There were also a reduced number of athletic trips. The fuel bills from the member towns are not finalized until mid-July. The final invoices were less than allotted.
- \$111,272: Instructional supplies and maintance supplies were lower due to the COVID-19 global pandemic. Consumable materials could not be utilized in the remote learning environment so there was a significant decrease in food for culinary, lumber and other raw materials for technology education and science lab materials. Grant funding became available to reimburse \$96,980 of cleaning supplies.

APPENDIX C

RECAP OF 2018-2019

Return Unspent Fund Balance:

The cancellation of 2017-2018 encumbrances of \$166,245 will be returned to the Member Towns. 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. Once the audit is final for 2018-2019, the funds will be returned.

Bethany	\$32,717
Orange	\$82,752
Woodbridge	<i>\$50,776</i>
Total	\$ 166,245

The <u>audited</u> fund balance for 2018-2019 is \$2,034,101 plus \$409,259 designated at yearend for security projects. These source of the available funds are described below.

FINANCIAL MANAGEMENT:

\$ 204,608

Our efforts to foster a District culture of finding cost savings and efficiencies has been successful producing savings of \$52,451. Grant money was applied for and awarded to offset the cost of the CEN for savings of \$27,440. \$5,000 less postage used due to digital communications. The District refinanced bonds and saved \$27,738 in interest payments. The District chose leasing 1:1 mobile devices as a more cost effective and technological practice, \$108, 493. The device can be kept current for curriculum needs and the District is not responsible for disposals. Computers from the current computer labs at the middle schools provided a source of replacement computers and repair parts avoiding new purchases.

SPECIAL EDUCATION (NET)

\$ 539,798

These accounts are extremely difficult to forecast. As examples, special need students can be hospitalized; move into the district or leave the district at any time; withdraw from Amity and enroll in Adult Education. Several students who were budgeted to be outplaced were not for a number of reasons. Some transportation needs were coordinated with the elementary districts to reduce the number of singletons on busses for outplacements. Any one of these events can have a significant impact, positive or negative, on the District's special education expenditures. The Director of Pupil Services has been successful in establishing suitable programs for students within the District and a number of students have returned from outplacement.

<u>OTHER:</u> \$ 1,289,695

\$346,235 SALARIES (OTHER): "Turnover savings" from replacing teachers and other staff who retired or resigned is over budget and savings from unpaid leaves-of-absence.

Athletic salaries were down from unfilled coaching positions at the middle school including cheerleading and several assistant coaching positions. Teacher coverages, summer work costs, substitute costs, degree changes and homebound services were less than anticipated.

\$387,507 MEDICAL (OTHER): The net balance of the medical account was under budget. Claims and fees were slightly lower than budgeted, \$328,426, costing 92.2% of expected claims. There were some other savings with other components of the account including employer contributions to HSA accounts, retiree payments, and employee coshare contributions.

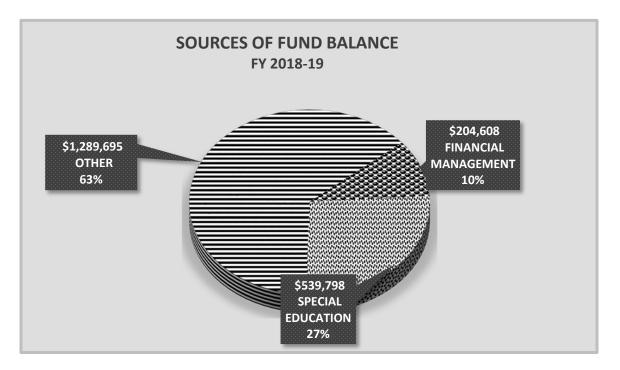
\$378,012 REVENUE: The Special Education Grant was higher than budgeted by \$224,297 based on actual special education costs and a higher reimbursement rate. The interest earned on the District's accounts was \$100,966 more than budgeted as interest rates were higher than budgeted. These accounts were adjusted during for the current budget cycle, 2019-2020.

\$79,974 SUPPLIES: Instructional supplies and transportation fuel were underbudget. The transportation fuel bid price was lower than budgeted and less fuel was used with some routes being reassigned. Mid-year staff changes may have impacted the spending in some instructional supply accounts. These areas were reviewed during the 2019-2020 budget and will be reviewed again during the upcoming budget process.

\$39,009 RENTALS: Athletic rentals were down \$19,552 due to lower ice rentals contract negotiated with new venue and the Town of Orange pool was being upgraded and was not available for part of the year. Another facility was used at lower cost. Special education rental of lease space was lower than anticipated and partially covered by a grant, \$17,400.

\$39,934 STAFF TRAVEL, CONFERENCES AND DUES & FEES: Schedule conflicts precluding some staff from attending conferences, grants funded some conferences, new staff attended fewer conferences and a few less requests from students for contest entries. The appropriate funding level for these accounts will be reviewed in the upcoming budget cycle.

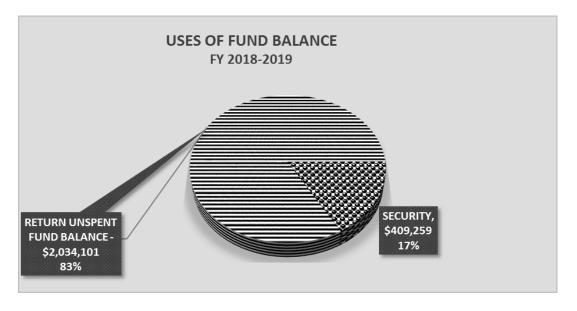
The primary sources of the fund balance are shown graphically below:



The use of the fund balance is proposed to return to the member towns:

- 1. **\$409,259** was designated in June 2019 for security projects
- 2. \$2,034,101 Return of unspent fund balance upon audit completion.

The uses of the fund balance are shown graphically below:



Return Unspent Fund Balance:
The audited unspent fund balance will be returned to the Member Towns, as follows:

Town of Bethany	\$ 392,378
Town of Orange	\$1,020,712
Town of Woodbridge	<i>\$ 621,011</i>
Total	\$2,034,101

APPENDIX D

RECAP OF 2019-2020

Return Unspent Fund Balance:

The cancellation of 2018-2019 encumbrances of \$35,457 will be returned to the Member Towns. 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) and we do not need to spend the entire encumbrance. Once the audit is final for 2019-2020, the funds will be returned.

Bethany	\$ 6,839
Orange	\$ 17,792
Woodbridge	<i>\$ 10,825</i>
Total	\$ 35,457

The audited fund balance for 2019-2020 is \$1,953,498, after the 1% or \$495,482 is transferred to the Capital Nonrecurring Account. The fund balance is net of \$515,077 of end-of-year expenditures that are posted in FY20. The source of the available funds are described below.

SUMMARY:

The monthly financial report for February 2020 as reported at the March AFC & BOE meetings forecasted a fund balance of \$799,396. Days later, on March 12, 2020, the District cancelled in-person instruction and learning. Most employees continued to work with the exception of substitute teachers. The hours of operation were still severely impacted as all after-school, weekend and evening activities were cancelled. This came at a time when schools would typically operate on extended schedules to accommodate sporting activities, overnight field trips, school plays, award ceremonies, stepping up and graduation ceremonies. Busses did not operate for 58 days in the District. Buildings remained open but with minimal staff as the majority of staff worked remotely, reducing utilities consumption. Contracts for professional services were re-negotiated or cancelled as were rentals of other fields, tables, and tents. Overtime and staff travel was non-existant and only a few conferences were held (via remote features).

FINANCIAL MANAGEMENT:

\$ 107,610

The turnover factor exceed the budget by \$70,559. Administrators carefully consider salary placement for new hires. Some part-time vacancies were not filled during the shutdown. Liability, workers' compensation, and student accident insurance coverages were negotiated at a lower rate than anticipated, \$37,051.

SPECIAL EDUCATION:

\$ 580,502

These accounts are extremely difficult to forecast. As examples, special need students can be hospitalized; move into the district or leave the district at any time; withdraw from Amity and enroll in Adult Education. Several students who were budgeted to be outplaced were not for a number of reasons. Some transportation needs were coordinated with the elementary districts to reduce the number of singletons on busses for outplacements. Any one of these events can have a significant impact, positive or negative, on the District's

special education expenditures. The State reimbursement rate fluctuates throughout the year. Expenses were down \$580,502 prior to the shutdown.

SALARIES, MEDICAL, PURCHASED SERVICES (OTHER): \$2,273,224

\$627,603 SALARIES (**OTHER**): Teacher coverages, substitute costs, coaching stipends, overtime, homebound services, and chaperone stipends were some of the budgeted items affected by the remote instruction environment. Payroll taxes were down as result of the lower payroll costs. All after-school, evening and weekend activities were cancelled for typically the busiest time of the school year.

\$926,221 MEDICAL (OTHER): The net balance of the medical account was under budget. Claims and fees were lower than budgeted as hospitals and doctors suspended routine visits, diagnostic tests, and non-emergency procedures amid the pandemic. The insurance claims were running at 95.7% of budget through February 2020 and fell to 81.3% by the end of the year. Dental claims were near zero during the final quarter of the fiscal year.

\$228,156 TRANSPORTATION SERVICES: (**OTHER**): School busses did not transport students for daily runs, late runs, athletic events or extra-curricular activites from mid-March through the end of the school year. The daily contract was re-negotiated with transportation contractors while other services were cancelled entirely. Fuel cost were reduced as a result of the shutdown.

\$82,664 PURCHASED SERVICES (OTHER): Purchased services costs were lower due to several factors. Cancellation of spring sports resulted in fewer athletic contests and fewer officials, monitors, and scorekeepers, \$32,000 FAV; \$26,000 FAV was saved for contracted services changes with a less expensive provider and training of in-house staff, \$14,000 FAV was not spent on end of year programs and events; \$8,955 FAV was left from the NEASC budget.

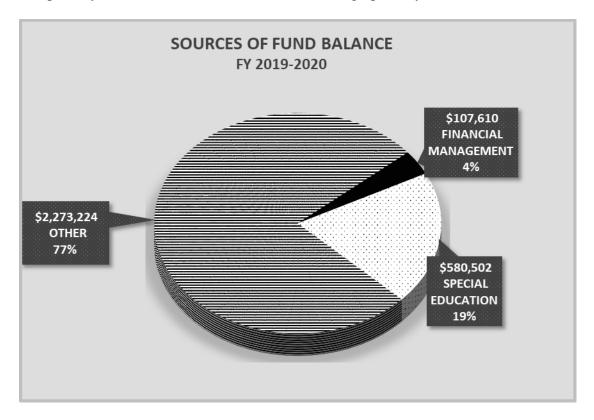
\$93,339 UTILITIES (OTHER): A mild winter combined with fuel cell operating properly to supply heat generated savings of \$17,731 FAV. Electricity usage was down due to the reduced occupancy in buildings, \$70,089 FAV.

\$57,290 STAFF TRAVEL AND CONFERENCES: Staff travel was halted in mid-March with many in-person conferences cancelled. Mileage payments for staff traveling between buildings and travel and accomodations for out of District travel were not needed during the final quarter of the school year.

\$70,483 INSTRUCTIONAL SUPPLIES (OTHER): Purchases and consumption of instructional materials was reduced during the remote instruction period. It was not feasible to use many art supplies, phototgraphy film, live specimens, lumber, and culinary supplies in a remote environment.

\$38,170 COMMUNICATIONS: TEL, POST, ETC. (OTHER): Less copy paper, postage, toner and other Xerox supplies were needed during the remote instruction period. The District also received a grant for internet services.

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



The Board of Education approved* uses of the fund balance are, as follows:

- 1. \$1,950,777 Return of unspent fund balance per audit.
- 2. \$ 495,482 Approved for Capital Reserve
- 3. **\$ 515,077** End of Year Purchases

\$1,950,777 RETURN OF UNSPENT FUND BALANCE *pending audit*: the annual audit is usually presented to the Amity Finance Committee and Board of Education for acceptance in December or January. Funds are returned to member towns after completion and acceptance of the audit.

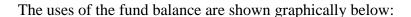
\$495,482 (1%) CAPITAL AND NONRECURRING ACCOUNT: The Amity Finance Committee and Board of Education approved moving forward in the process to transfer 1% of the FY20 budget surplus into the Capital and Nonrecurring account.

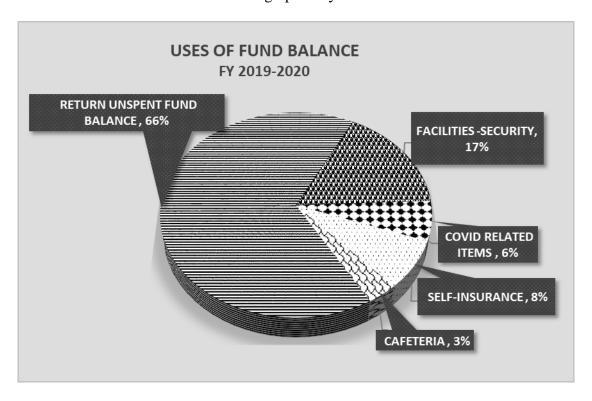
\$515,077 END OF YEAR PURCHASES (EOY):

\$229,311 SELF-INSURANCE FUNDING. (EOY): The suspension of routine exams, diagnostic tests, dental appointments, and non-emergency surgeries reduced the medical claims for the final quarter of FY20. It is anticipated that once the State reopens the missed procedures will be scheduled, as well as those of age and need for the current year, and in a worse case scenario claims could rise due to COVID-19 treatments as the District reopens. This amount represents raising the self-insurance reserve from a 25% threshold of claims to 30% on a temporary basis of one year. If funds are not needed, the reserve will be reduced to 25% and the funds will be utilized to offset the budget request for fiscal year 2021-22.

\$185,766 COVID-19 (EOY): Purchases of personal protective equipment such as masks, gowns, gloves, and face shields were made to prepare for reopening, recognizing none of these items were anticipated in developing the FY21 budget. Thermal security cameras were purchased to register temperatures and perform a mask check of staff and students arriving at main entrances of all three schools. Laptops for high school teachers were purchased to prepare for remote instruction upon reopening.

\$100,000 CAFETERIA (EOY): The District's fund to support school lunch program has been running a deficit for three straight years. The ongoing repair and maintenance of aging equipment contributed to the deficit and the State's change in eligibility status determination increased free and reduced lunch status. Next year appears to be even more challenging in the COVID-19 environment as we will have to change how service is provided, food is served, and food packaging. These necessary changes will increase costs with no anticipated increase in revenue.





Return Unspent Fund Balance:

The audited unspent fund balance will be returned to the Member Towns, as follows:

Total	\$1,950,777
Woodbridge	\$ 600,371
Orange	\$ 992,321
Bethany	\$ 358,085

APPENDIX E

RECAP OF 2020-2021

Return Unspent Fund Balance:

The cancellation of 2019-2020 encumbrances of \$352,364 will be returned to the Member Towns. We encumber funds for goods and services received by June 30th but not yet billed. The final quarter of FY20 was a period of shut down making it difficult to determine the need for open orders and there was a substantial amount of unemployment claims in dispute. 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. Once the audit is final for 2020-21, the funds will be returned.

Bethany	\$ 64,680
Orange	\$179,241
Woodbridge	<i>\$108,444</i>
Total	\$352,364

The audited fund balance for 2020-2021 is \$2,483,748 after designating \$187,600 for items cut from the FY22 budget, \$339,360 for end of year purchases (security and technology) and \$507,844 approved for capital nonrecurring account. These source of the available funds are described below.

FINANCIAL MANAGEMENT:

\$ 578,763

Our efforts to foster a District culture of finding cost savings and efficiencies has been successful producing savings of \$128,708. Grant money was applied for and awarded to offset the cost of the CEN for savings of \$27,440, \$49,245 Pegpetia Grant for course equipment and supplies, \$28,339 for polycarbonate dividers manufactured in-house. \$968,619 was withheld in general fund accounts in preparation for operating in a pandemic environment. These funds were redistributed as needed and it was difficult to predict all throughout the year how much funds would be needed to keep schools open. The District operating under many scenarios, remote, hybrid, shortened days and full days. All operations were subject to constant change during the year making forecasting difficult.

\$194,873 SALARIES (FINANCIAL MANAGEMENT): The administration worked closely with bargaining units to develop options for remote work to keep all staff employed. The administration hired an additional number of bench subs including college students (allowed under executive order) to maintain our own pool of substitutes rather than contracting for more outside services.

\$255,182 GRANTS AWARDS (FINANCIAL MANAGEMENT): The administration closely tracked expenses related to the pandemic and applied for funding under various grants. \$255,182 of expenses were credited to the general operation and charged to appropriate grants.

SPECIAL EDUCATION:

\$1,078,971

These accounts are extremely difficult to forecast. As examples, special need students can be hospitalized; move into the district or leave the district at any time; withdraw from

Amity and enroll in Adult Education. Several students who were budgeted to be outplaced were not for a number of reasons. Some transportation needs were coordinated with the elementary districts to reduce the number of singletons on busses for outplacements. Any one of these events can have a significant impact, positive or negative, on the District's special education expenditures. The Director of Pupil Services has been successful in establishing suitable programs for students within the District and a number of students have returned from outplacement. Transportation budget was \$488,891 FAV and the tuition budget was \$240,380 FAV.

\$349,700 REVENUE (SPECIAL EDUCATION): The Special Education Grant was higher than budgeted by \$349,700 based on actual special education costs and a higher reimbursement rate. The interest earned on the District's accounts was \$31,662 less than budgeted as interest rates were less than budgeted. Building rental and athletics events generated no income due to COVID-19 pandemic and offset the gain in special education revenue.

OTHER: \$ 1,858,818

\$1,315,946 MEDICAL (OTHER): The net balance of the medical account was under budget. Claims and fees were significantly lower than budgeted, \$1,125,718, amounting to only 75.8% of expected claims. The assumption is members were still hesitant to get routine care because of the pandemic. There were some other savings with other components of the account including employer contributions to HSA accounts, retiree payments, and employee co-share contributions.

\$212,213 TRANSPORTATION (OTHER): Transportation costs including fuel were reduced since no late busses were offered during the year, fewer athletic trips and no field trips requiring bus services were scheduled due to the pandemic.

\$192,377 SUPPLIES: Instructional supplies and maintenance supplies were underbudget. The teaching staff adjusted purchases for remote and hybrid learning. \$96,980 was reimbursed through grants.

\$111,272 UTILITIES (OTHER): The buildings did not operate under full capacity for most of the year and there were no building rentals, limited evening activites and many more outside events.

\$102,300 PROFESSIONAL TECHNICAL SERVICES (OTHER): Athletic services were reduced for officials and game day workers and special education services were less than budgeted. These savings were offset by higher legal costs.

\$96,312 STAFF TRAVEL, CONFERENCES AND DUES & FEES (OTHER): Staff travel was not necessary with remote options and many in-person conferences cancelled. Mileage payments for staff traveling between buildings and travel and accommodations for out of District travel were not needed during the school year. Less entry fees for athletics also reduced fees.

Some of these savings were offset by COVID purchases.

\$1,858,818
OTHER
53%

\$578,763
FINANCIAL
MANAGEMENT
16%

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

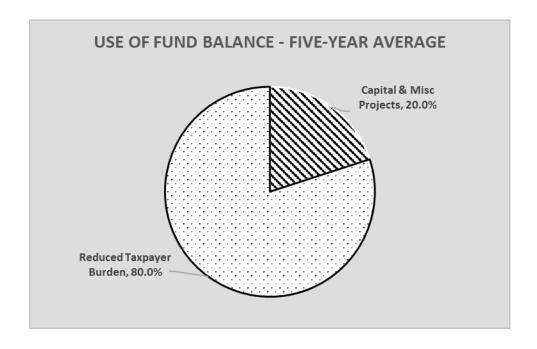
The use of the fund balance was designated as follows:

1. \$187,600 was designated in items removed from the 21-22 budget

\$1,078,971 SPECIAL EDUCATION 31%

- 2. **\$339,360** was designated for security and technology items eligible for grant reimbursement.
- 3. \$507,844 approved for capital nonrecurring projects to offset future budgets.
- 4. \$2,483,748 Return of unspent fund balance upon audit completion.

The uses of the fund balance are shown graphically below:



Return Unspent Fund Balance:
The audited unspent fund balance would be returned to the Member Towns, as follows:

Town of Bethany	<i>\$ 449,260</i>
Town of Orange	\$1,248,034
Town of Woodbridge	<i>\$ 786,454</i>
Total	\$2,483,748

Amity Regional School District No. 5 - Budget Transfers 2021-2022

MONTH/YR	JNL#	ACCOUNT NUMBER & DESCRIPTION	AMOUNT	DESCRIPTION
JUL 2022-July	129	05-13-2212-5581 TRAVEL - CONFERENCES	(400)) INCREASE IN STAR TESTING
2022-July 2022-July	129	05-13-2212-5611 INSTRUCTIONAL SUPPLIES		INCREASE IN STAR TESTING INCREASE IN STAR TESTING
AUG	120	00 10 2212 0011 INCTINGOTION IZ 0011 EIEG	100	THORIENCE IN COMMITTEE THE
2022-Aug	91	03-14-2600-5613 MAINTENANCE/CUSTODIAL SUPPLIES	(133)	UHAUL TRUCK RENTAL
2022-Aug	91	03-14-2600-5440 RENTALS-LAND,BLDG,EQUIPMENT		UHAUL TRUCK RENTAL
SEPT				
2022- Sept	11	01-11-1010-5690 OTHER SUPPLIES	(1,100)	add'l classes require keyboard
2022- Sept	11	01-11-1010-5611 INSTRUCTIONAL SUPPLIES		add'l classes require keyboard
2022- Sept	66	05-14-2350-5690 OTHER SUPPLIES		Upgrade SNAP Software
2022- Sept	66	01-13-2130-5690 OTHER SUPPLIES		Upgrade SNAP Software
2022- Sept 2022- Sept	66 66	02-13-2130-5690 OTHER SUPPLIES 03-13-2130-5690 OTHER SUPPLIES) Upgrade SNAP Software) Upgrade SNAP Software
2022- Sept 2022- Sept	356	03-13-2130-3090 OTHER SUPPLIES 03-11-3202-5420 REPAIRS,MAINTENANCE & CLEANING		Swim Timing Purchase
2022- Sept	356	03-11-3202-5731 EQUIPMENT - REPLACEMENT		Swim Timing Purchase
2022- Sept	360	02-13-2400-5330 OTHER PROFESSIONAL & TECH SRVC		REPLACE WEIGHT ROOM FLOOR
2022- Sept	360	02-13-2400-5590 OTHER PURCHASED SERVICES	(1,250)	REPLACE WEIGHT ROOM FLOOR
2022- Sept	360	02-13-2400-5420 REPAIRS,MAINTENANCE & CLEANING	2,500	REPLACE WEIGHT ROOM FLOOR
OCT				
2022- Oct	77	01-11-1007-5611 INSTRUCTIONAL SUPPLIES		Health PD Transfer
2022- Oct	77	01-11-1007-5810 DUES & FEES		Health PD Transfer
2022- Oct 2022- Oct	119 119	02-11-1010-5611 INSTRUCTIONAL SUPPLIES 02-11-1010-5730 EQUIPMENT - NEW		PURCHASE A KEYBOARD(MUSIC) PURCHASE A KEYBOARD(MUSIC)
2022- Oct	130	05-14-2700-5512 VO-AG/VO-TECH REG ED		TRANSPORTATION NONNEWAUG HS
2022- Oct	130	05-14-2700-5513 IN DISTRICT PRIVATE REG ED		TRANSPORTATION NONNEWAUG HS
2022- Oct	267	03-13-2400-5581 TRAVEL - CONFERENCES	• • •	PowerSchool Wrkshp-F. Barretta
2022- Oct	267	03-13-2400-5580 STAFF TRAVEL	(600)	PowerSchool Wrkshp-F. Barretta
2022- Oct	329	02-13-2120-5590 OTHER PURCHASED SERVICES		STUDENT RECORD FILE FOLDERS
2022- Oct	329	02-13-2120-5581 TRAVEL - CONFERENCES	• • •	STUDENT RECORD FILE FOLDERS
2022- Oct	384 384	01-11-1014-5810 DUES & FEES		HISTORY CLASSROOM SUPPLIES
2022- Oct 2022- Oct	304 441	01-11-1014-5611 INSTRUCTIONAL SUPPLIES 05-13-2213-5611 INSTRUCTIONAL SUPPLIES		HISTORY CLASSROOM SUPPLIES 11/2/21 PD Lunch
2022- Oct	441	05-13-2213-5590 OTHER PURCHASED SERVICES		11/2/21 PD Lunch
NOV			, -	
2022- Nov	115	02-11-1006-5611 INSTRUCTIONAL SUPPLIES	(277)	SPANISH CONFERENCE
2022- Nov	115	02-11-1006-5810 DUES & FEES		SPANISH CONFERENCE
2022- Nov	136	02-11-1005-5611 INSTRUCTIONAL SUPPLIES		PURCHASE BOOKS
2022- Nov	136	02-11-1005-5641 TEXTBOOKS	1,309	PURCHASE BOOKS
DEC 2022- Dec	96	04 44 4040 F220 OTHER PROFESSIONAL & TECH SRVC	(201)	amplifiare for music leb
2022- Dec 2022- Dec	86 86	01-11-1010-5330 OTHER PROFESSIONAL & TECH SRVC 01-11-1010-5611 INSTRUCTIONAL SUPPLIES		amplifiers for music lab amplifiers for music lab
2022- Dec	162	03-13-2400-5581 TRAVEL - CONFERENCES		Seminar for Miguel Pickering
2022- Dec	162	03-13-2400-5580 STAFF TRAVEL		Seminar for Miguel Pickering
JAN				
2022-Jan	34	01-11-3201-5690 OTHER SUPPLIES		Actor's Club - Play Production
2022-Jan	34	01-11-3201-5590 OTHER PURCHASED SERVICES		Actor's Club - Play Production
2022-Jan	153	02-13-2120-5330 PROF/TECH SERVICES) Table rental-Career Fair Table rental-Career Fair
2022-Jan 2022-Jan	153 167	02-13-2400-5440 RENTALS 05-13-2213-5611 INSTRUCTIONAL SUPPLIES		Retirement & Yrs Serv Gifts
2022-Jan	167	05-13-2213-5690 OTHER SUPPLIES	• • •	Retirement & Yrs Serv Gifts
FEB			,,,,,,	
2022-Feb		60 01-13-2400-5690 OTHER SUPPLIES	(10)	Shipping
2022-Feb		60 01-13-2400-5550 COMMUNICATIONS		Shipping
2022-Feb		67 01-13-2220-5611 INSTRUCTIONAL SUPPLIES		New laminator is needed
2022-Feb		67 01-13-2220-5330 PROF/TECH SERVICES		New laminator is needed
2022-Feb		67 01-13-2220-5642 LIBRARY BOOKS		New laminator is needed
2022-Feb 2022-Feb		67 01-13-2220-5731 REPLACEMENT EQUIPMENT 113 05-13-2212-5322 INSTRUCTIONAL PRG IMP	-	New laminator is needed) 3/18/22 Prof Dev Day Lunch
2022-Feb		113 05-13-2212-5590 OTHER PURCHASED SERVICES		3/18/22 Prof Dev Day Lunch
2022-Feb		213 02-14-2600-5613 CUSTODIAL SUPPLIES		Fridge replacement
2022-Feb		213 02-14-2600-5731 REPLACEMENT EQUIPMENT	630	Fridge replacement
2022-Feb		234 03-14-2600-5420 REPAIR & MAINTENANCE	(250)	U-haul rental

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ADDITION SAMOUNT DESCRIPTION 222-Feb 234 03-14-2600-5440 RENTALS-LAND, BLDG SCQUIPMENT 250 U-haul rental 2022-Feb 236 03-11-1016-5690 OTHER SUPPLIES 478 Bookcases for Reading Dept. 236 03-11-1016-5690 OTHER SUPPLIES 478 Bookcases for Reading Dept. 236 03-11-1016-5690 OTHER SUPPLIES 478 Bookcases for Reading Dept. 236 03-11-1016-5690 OTHER SUPPLIES 478 Bookcases for Reading Dept. 236 03-11-1016-5690 OTHER SUPPLIES 478 Bookcases for Reading Dept. 236 03-11-1016-5691 OTHER SUPPLIES 260.00 Purch. Books & Periodicals 2022-Mar 39 02-13-2220-5692 LIBRARY BOOKS 850.00 Purch. Books & Periodicals 2022-Mar 40 03-11-1001-5811 TAND TEACH 2022-Mar 53 01-11-014-5330 PROFTECH SERVICES 1,350.00 History Workshop funding 2022-Mar 78 03-11-1008-5611 INSTRUCTIONAL SUPPLIES 1,350.00 History Workshop funding 2022-Mar 78 03-11-1008-5611 INSTRUCTIONAL SUPPLIES 540.00 not competing this year-TSA 2022-Mar 104 03-11-1001-5611 INSTRUCTIONAL SUPPLIES 540.00 not competing this year-TSA 2022-Mar 104 03-11-1001-5611 INSTRUCTIONAL SUPPLIES 500.00 norepairmeded 2022-Mar 122 02-13-2220-5803 PROFTECH SERVICES (9.00) ALA Membership Renewal 2022-Mar 122 02-13-2220-5803 PROFTECH SERVICES (9.00) ALA Membership Renewal 2022-Mar 123 02-13-2220-5803 PROFTECH SERVICES (144.00) Social Studies Kit 2022-Mar 123 02-13-2220-5803 PROFTECH SERVICES (149.00) Social Studies Kit 2022-Mar 123 02-13-2220-5803 PROFTECH SERVICES (149.00) Social Studies Kit 2022-Mar 124 03-11-1011-5801 INSTRUCTIONAL SUPPLIES 149.00 Social Studies Kit 2022-Mar 140 03-11-1011-5801 DUES & FEES (149.00) AFRICAN HISTORY PRESENTATION 2022-Mar 140 03-11-1011-5801 DUES & FEES (149.00) AFRICAN HISTORY PRE
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2022-Mar 172 01-13-2120-5810 DUES & FEES 30.00 Conference CSCA Registration
2022-Mar 176 03-13-2220-5690 OTHER SUPPLIES (585.42) library book purchase
2022-Mar 176 03-13-2220-5642 LIBRARY BOOKS 585.42 library book purchase
2022-Mar 181 05-14-2700-5513 TRANSPORTATION (1,500.00) TRANSFER FOR PPS FURNITURE
2022-Mar 181 04-13-2190-5730 EQUIPMENT - NEW 1,500.00 TRANSFER FOR PPS FURNITURE
2022-Mar 184 03-11-1009-5690 OTHER SUPPLIES (300.00) Fee for Mu Alpha Field Trip
2022-Mar 184 03-11-1009-5810 DUES & FEES 300.00 Fee for Mu Alpha Field Trip
2022-Mar 191 03-13-2220-5810 DUES & FEES (322.76) Supplies for book covers/tape
2022-Mar 191 03-13-2220-5611 INSTRUCTIONAL SUPPLIES 322.76 Supplies for book covers/tape
2022-Mar 199 03-11-1001-5420 REPAIR & MAINTENANCE (157.88) art classroom supplies
2022-Mar 199 03-11-1001-5611 INSTRUCTIONAL SUPPLIES 157.88 art classroom supplies
2022-Mar 205 03-13-2130-5690 OTHER SUPPLIES (125.00) CT NURSE CONFERENCE
2022-Mar 205 03-13-2130-5810 DUES & FEES 125.00 CT NURSE CONFERENCE
2022-Mar 221 03-13-2130-5810 DUES & FEES 700.00 Contract Course Reimbursement
2022-Mar 221 05-14-2320-5810 DUES & FEES (700.00) Contract Course Reimbursement

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AMITY REGIONAL SCHOOL DISTRICT NO. 5

Bethany Orange Woodbridge 25 Newton Road, Woodbridge Connecticut 06525



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

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

To: Jennifer Byars, Ed. D., Superintendent of Schools

From: Theresa Lumas, Director of Finance and Administration

Re: Budget Transfers over \$3,000 for FY 2021-22

Date: March 22, 2022

Physical Education - ARHS:

The Physical Education Department Chair, Mr. Mahon, has requested a transfer of \$4,140 to cover the cost of two pieces of cardo equipment. These exercise bikes will replace broken equipment. The bikes are discounted to \$1,658 each and the shipping is \$825. This pricing reflects savings of \$1,883 off regular prices for this quality of machines.

Motions:

For the Amity Finance Committee:

Recommend the Amity Board of Education approve...

For the Amity Board of Education:

Move to approve -

the following budget transfer to purchase two exercise bikes at Amity Regional High School.

ACCOUNT			
NUMBER	ACCOUNT NAME	FROM	TO
03-11-1013-5611	Instructional Supplies	\$4,140	
03-11-1013-5731	Equipment - Replacement		\$4,140

Athletics - ARHS:

The Athletic Director, Mr. Goodwin, has requested a transfer of \$7,000 to cover additional bus transportation in place of van rentals. Rental vehicles are budgeted for certain teams/events but currently it is difficult to secure a van rental. Mr. Goodwin was able to secure the transportation with our owner/operators.

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Motions:

For the Amity Finance Committee:

Recommend the Amity Board of Education approve...

For the Amity Board of Education:

Move to approve -

the following budget transfer to bus transportation from rental for athletics.

ACCOUNT

NUMBER	ACCOUNT NAME	FROM	TO
03-11-3202-5440	Rentals	\$7,000	
03-11-3202-5510	Transportation		\$7,000

Special Education #1:

The Director of Special Education has requested transfers to cover the purchase of two fireproof filing cabinets. The volume of the special education records and the extended time students are in the District are driving the need. Special education and section 504 records are required to be kept in a fire safe (proof) locking cabinets. Funds are being reallocated from homebound tutoring and tuition lines.

Motions:

For the Amity Finance Committee:

Recommend the Amity Board of Education approve...

For the Amity Board of Education:

Move to approve –

the following budget transfer to purchase two fireproof filing cabinets.

ACCOUNT			
NUMBER	ACCOUNT NAME	FROM	TO
04-13-6110-5560	Tuition - Public Out	\$3,950	
04-15-1204-5111	Certified Salaries - Homebound	\$3,950	
04-13-2190-5730	Equipment - New		\$7,900

Special Education #2:

The Director of Special Education has requested a transfer to cover unfilled paraeducators positions. This transfer covers the fees associated with contracting with an agency to provide paraprofessional

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support in absence of ARSD being able to hire our own paraeducator. This transfer utilizes unspent paraeducator l funds due to open and unfilled positions.

Motions:

For the Amity Finance Committee:

Recommend the Amity Board of Education approve...

For the Amity Board of Education:

Move to approve -

the following budget transfer to contract with a consultant to cover an unfilled paraeducator position.

ACCOUNT			
NUMBER	ACCOUNT NAME	FROM	TO
03-12-1200-5112	Classified Salaries	\$35,000	
04-13-2190-5330	Professional Technical		\$35,000

Music - ARHS:

The Music Education Department Chair, Ms. Zamachaj, has requested a transfer of \$3,000 to cover additional supplies for the music department. The supplies include music for the spring concert and some small equipment, under \$300, for the Internet broadcast radio, electronic music and studio recording courses. The repair account has funds available.

Motions:

For the Amity Finance Committee:

Recommend the Amity Board of Education approve...

For the Amity Board of Education:

Move to approve -

the following budget transfer to purchase additional music supplies in the music department at Amity Regional High School.

ACCOUNT			
NUMBER	ACCOUNT NAME	FROM	TO
03-11-1010-5420	Repair & Maintenance	\$3,000	
03-11-1010-5611	Instructional Supplies		\$3,000

AMITY REGIONAL SCHOOL DISTRICT NO. 5

Bethany Orange Woodbridge 25 Newton Road, Woodbridge Connecticut 06525



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

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

To: Jennifer Byars, Ed. D., Superintendent of Schools

From: Theresa Lumas, Director of Finance and Administration

Re: Capital Projects FY 2021-22 Change Order and Budget Transfer

Date: March 29, 2022

Culvert and Drain Cleanouts and Fencing – Amity Regional High School:

Sections of the culvert near the stadium and softball field needs maintenance. The storm catch basins and drains at the stadium need to be scoped and flushed. It is not known when this maintenance was last performed. The Town of Woodbridge has approved the culvert cleanout.

This part of the project was not originally funded but it is necessary to keep water from ponding on the track and surrounding areas. The request also includes funding a section of fence the field house culvert for safety reasons. This section of the culvert is adjacent to the sidewalk. The funds are requested from the bond project contingency account. There will be approximately \$214,000 remaining in the bond contingency if this transfer is approved.

For the Amity Finance Committee:

Recommend the Amity Board of Education approve...

For the Amity Board of Education:

Move to approve -

Funds for the culvert and storm drain maintenance and fence at Amity Regional High School stadium.

Motions for Budget Transfer:

For the Amity Finance Committee:

Recommend the Amity Board of Education approve ...

For the Amity Board of Education:

Move to approve...

A transfer from remaining funds in the bond project contingency account to the stadium project Account for culvert and drain maintenance and fence.

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ACCOUNT NUMBER	ACCOUNT NAME	FROM	ТО
17-00-15-0053-5715 17-00-15-0047-5720	Contingency Improvements to Sites	\$20,000	\$20,000

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ORG	ACCOUNT DESCRIPTION	Description	ORIGINAL APPROP	TRANFRS/ADJSMTS	REVISE	D BUDGET	ΥT	D EXPENDED	ENC	UMBRANCE	AILABLE DGET	VENDOR NAME	COMMENT
	IMPROVEMENTS												
00150047	TO SITES	Athletics	3,167,960	173,146	\$	3,341,106	\$	2,846,292.47	\$	32,615.24	\$ 462,198.29		
2021	09/01/2020	API		241406			\$	175,500.00				FIELDTURF	ATHLETIC TURF
2021	10/07/2020	API		241406			\$	173,250.00				FIELDTURF	ATHLETIC TURF
2021	10/26/2020	API		241406			\$	35,199.90				FIELDTURF	ATHLETIC TURF
	12/04/2020			251145			\$	500.00				J & M LANDSCAPING	Service - Field 3 Project
2021	03/30/2021	API		241406			\$	434,691.00				FIELDTURF	ATHLETIC TURF
2021				241406			\$	101,700.00				FIELDTURF	ATHLETIC TURF
2021	06/08/2021	API		251842			\$	63,673.45				FIELDTURF	ATHLETIC TURF
2021	06/08/2021	API		241406			\$	909,000.00				FIELDTURF	ATHLETIC TURF
2022	08/02/2021	API		241406			\$	483,335.10				FIELDTURF	ATHLETIC TURF
2022	08/02/2021	API		251842			\$	58,500.19				FIELDTURF	ATHLETIC TURF
2022	09/09/2021	API		241406			\$	379,987.19				FIELDTURF	APPLICATION 9
2022	09/09/2021	API		252036			\$	14,800.64				FIELDTURF	APPLICATION 9
2022		-		251842			\$	16,155.00				FIELDTURF	APPLICATION 9
	IMPROVEMENTS							·					
00150048	TO BUILDINGS	HVAC	1,830,630	181,967	\$	2,012,597	\$	1,908,073.42	\$	94,598.47	\$ 9,925.11		
												SAV-MOR COOLING &	SERVICE - CONTRACT -
2020	5/22/2020	API		241814			\$	14,725.00				HEATING INC	AMITY HIG
												SAV-MOR COOLING &	SERVICE - CONTRACT -
2021	07/17/2020	API		241814			\$	196,555.00	Υ			HEATING INC	AMITY HIG
												SAV-MOR COOLING &	SERVICE - CONTRACT -
2021	09/01/2020	API		241814			\$	275,321.91	Υ			HEATING INC	AMITY HIG
												SAV-MOR COOLING &	SERVICE - CONTRACT -
2021	09/01/2020	API		241814			\$	50,416.67	Υ			HEATING INC	AMITY HIG
												SAV-MOR COOLING &	SERVICE - CONTRACT -
2021	09/01/2020	API		241814			\$	80,199.00	Υ			HEATING INC	AMITY HIG
												SAV-MOR COOLING &	SERVICE - CONTRACT -
2021	12/09/2020	API		241814			\$	1,662.50	Υ			HEATING INC	AMITY HIG
												SAV-MOR COOLING &	SERVICE - CONTRACT -
2021	01/07/2021	API		241814			\$	33,072.64	Υ			HEATING INC	AMITY HIG
												SAV-MOR COOLING &	SERVICE - CONTRACT -
2021	04/30/2021	API		251440			\$	21,330.00	Υ			HEATING INC	AMITY HIG
2021	05/04/2021	API		250900			\$	5,699.76	Υ			VANZELM ENGINEERS	SERVICES HVAC
												SAV-MOR COOLING &	SERVICE - CONTRACT -
2021	06/08/2021	API		251440			\$	14,665.00	Υ			HEATING INC	AMITY HIG
2021	06/15/2021	API		250900			\$	2,472.50	Υ			VANZELM ENGINEERS	SERVICES HVAC
												SAV-MOR COOLING &	SERVICE - CONTRACT -
2021	06/30/2021	API		251440			\$	365,315.00	Υ			HEATING INC	AMITY HIG
2021	06/30/2021	API		250900			\$	847.50	Υ			VANZELM ENGINEERS	SERVICES HVAC
												VANZELM	
2022	08/30/2021	API		251875			\$	980.24				COMMISSIONIN	SERVICE - ADMIN SRVCS
												VANZELM	
2022	08/30/2021	API		260544			\$	1,309.76				COMMISSIONIN	SERVICE - ADMIN SRVCS
												SAV-MOR	CONTRACT - AMITY
2022	09/09/2021	API		251440			\$	412,185.00				COOLING&HEAT	HIGH AHU
												SAV-MOR	
2022	09/09/2021	API		251440			\$	347,280.00				COOLING&HEAT	APP 5

ORG	ACCOUNT DESCRIPTION	Description	ORIGINAL APPROP	TRANFRS/ADJSMTS	REVISED BUDG	ET	YTD EXPENDED	ENCUMBRANC	AILABLE GET	VENDOR NAME	COMMENT
										MOBILE AIR POWER	SERVICE - HVAC RENTAL
2022	09/28/2021	API		260677			\$ 188.02			REN	bala
							,			MOBILE AIR POWER	SERVICE - HVAC RENTAL
2022	09/28/2021	API		260677			\$ 76.50			REN	bala
							,			MOBILE AIR POWER	SERVICE - HVAC RENTAL
2022	09/28/2021	API		260677			\$ 1,921.33			REN	bala
										MOBILE AIR POWER	
2022	09/28/2021	API		252002			\$ 5,576.00			REN	SERVICE - HVAC RENTAL
										MOBILE AIR POWER	
2022	09/28/2021	API		252002			\$ 6,337.52			REN	SERVICE - HVAC RENTAL
2022	10/15/2021	API		260544			\$ 620.00			VANZELM ENGINEERS	SERVICES HVAC
2022	11/4/2021	API		260544			\$ 380.39			VANZELM ENGINEERS	SERVICES HVAC
										SAV-MOR	
2022	11/23/2021	API		251440			\$ 51,161.00			COOLING&HEAT	SERVICES HVAC
2022	12/17/2021			260544		_	\$ 2,725.00			VANZELM ENGINEERS	SERVICES HVAC
						\neg				SAV-MOR	
2022	1/10/2022	API		251440			\$ 9,550.00			COOLING&HEAT	SERVICES HVAC
2022	1/10/2022	API		260544			\$ 278.65			VANZELM ENGINEERS	SERVICES HVAC
2022	2/7/2022			260544		\neg	\$ 135.00			VANZELM ENGINEERS	SERVICES HVAC
2022	3/9/2022			260544		_	\$ 5,086.53			VANZELM ENGINEERS	SERVICES HVAC
	IMPROVEMENTS					\top					
00150049	TO BUILDINGS	Chillers	140,000	0	\$ 140,0	00	\$ 136,822.00	\$ -	\$ 3,178.00		
										TRANE BUILDING	SERVICE - Contract
2021	09/01/2020	API	329846	241572	115945		\$ 136,822.00	Υ		SERVICES	HVAC
	IMPROVEMENTS										
00150050	TO BUILDINGS	Paving	600,000	-71,640	\$ 528,3	50	\$ 507,253.80	\$ -	\$ 21,106.20		
										B & W PAVING &	
2021	09/01/2020	API	372188	242291	116171		\$ 270,514.80			LANDSCAPING, LLC	SERVICE - PARKING LOT
2022	07/15/2021	API	372468	260252	\$ 122,5	32	\$ 60,000.00			H AND L PAVING, LLC	SERVICE - PARKING LOT
											SERVICE - PARKING LOT
2022	09/28/2021	API	372468	252039			\$ 132,974.00			H AND L PAVING, LLC	PHAS
											SERVICE - PARKING LOT
2022	09/28/2021	API	372468	260252			\$ 29,815.00			H AND L PAVING, LLC	PHAS
											SERVICE - PARKING LOT
2022	09/28/2021	API	372468	260251			\$ 13,950.00			H AND L PAVING, LLC	PHAS
	OTHER									·	
	PROFESSIONAL &										
00150051	TECH SRVC	coı	108,018	-39,156	\$ 68,8	52	\$ 68,862.12	\$ -	\$ -		
					,	\neg					ANALYTICAL SERVICES
2021	07/17/2020			250130			\$ 15,500.00			S & P RATINGS	WITH U
											PROFESSIONAL
2021	07/17/2020			250133			\$ 21,700.00			DAY PITNEY LLP	SERVICES-BOND
											FINAL OFFICIAL
2021	07/17/2020			250139			\$ 394.52			TECHNIQUE PRINTERS I	STATEMENT -
											FINANCIAL ADVISORY
2021	07/17/2020			250188			\$ 26,000.00			HILLTOPSECURITIES	FEES, D
						\top	·				CERTIFYING,
2021	08/03/2020			250131		- 1	\$ 4,000.00	1		US BANK	REGISTRAR, TRA

	ACCOUNT		ORIGINAL							ΑV	AILABLE		
ORG	DESCRIPTION	Description	APPROP	TRANFRS/ADJSMTS	REVISED BUDGET	YTD	EXPENDED	EN	CUMBRANCE	BUE	OGET	VENDOR NAME	COMMENT
													ONLINE LEGAL AD-
2021	09/01/2020			250454		\$	500.00					ARIZENT	NOTICE OF
													BOND ISSUE 2020
2021	11/09/2020			250958		\$	767.60					IPREO, LLC	\$6,570,000
	IMPROVEMENTS												
00150052	TO BUILDINGS	Acoustics	245,000	0	\$ 245,000	\$	5,850.00	\$	68,745.00	\$	170,405.00		
												COTE ACOUSTICAL	SERVICE - PROJECT
2021	10/07/2020			250798		\$	2,150.00					CONS	ACOUSTIC
												COTE ACOUSTICAL	SERVICE - PROJECT
2022	9/8/2021			250798		\$	3,700.00					CONS	ACOUSTIC
	IMPROVEMENTS												
00150053	TO BUILDINGS	Contingency	478,392	-244,317	\$ 234,075	\$	-	\$	-	\$	234,074.88		
	Total Bond												
	Projects		6,570,000	0	\$ 6,570,000	\$	5,473,153.81	\$	195,958.71	\$	900,887.48		

Use of Physical Force

Physical Restraint/Seclusion/Exclusionary Time Out

The Amity Regional School District No. 5 (ARSD) Board of Education (Board) believes that maintaining an orderly, safe environment is conducive to learning and is an appropriate expectation of all staff members within the district. To the extent that staff actions comply with all applicable statutes and Board policy governing the use of physical force, including physical restraint of students and seclusion of students, staff members will have the full support of the Board of Education in their efforts to maintain a safe environment.

The Board recognizes that there are times when it becomes necessary for staff to use reasonable restraint or place a student in seclusion as an emergency intervention to protect a student from harming himself/herself or to protect others from harm.

Definitions

Life-threatening physical restraint means any physical restraint or hold of a person that restricts the flow of air into a person's lungs, whether by chest compression or any other means, or immobilizes or reduces the free movement of a person's arms, legs or head while the person is in the prone position.

Psychopharmacologic agent means any medication that affects the central nervous system, influencing thinking, emotion or behavior.

Physical restraint means any mechanical or personal restriction that immobilizes or reduces the free movement of a person's arms, legs or head. Excluded from this definition is briefly holding a person in order to calm or comfort the person; restraint involving the minimum contact necessary to safely escort a person from one area to another; medical devices including but not limited to, supports prescribed by a health care provider to achieve proper body position or balance; helmets or other protective gear used to protect a person from injuries due to a fall; or helmets, mitts and similar devices used to prevent self-injury when the device is part of a documented treatment plan or individualized education program pursuant to Connecticut's special education laws or prescribed or recommended by a medical professional and is the least restrictive means to prevent such self-injury.

School employee means a teacher, substitute teacher, school administrator, Superintendent, guidance counselor, psychologist, social worker, nurse, physician, school paraprofessional, school security officer, or coach employed by the Board of Education or working in a public elementary, middle or high school; or any other individual who, in the performance of his/her duties has regular contact with students and who provides services to or on behalf of students enrolled in the district's schools, pursuant to a contract with the Board of Education.

Use of Physical Force

Seclusion means the involuntary confinement of a student in a room, with or without staff supervision, in a manner that prevents the student from leaving.

Student means a child (A) enrolled in grades kindergarten to twelve, inclusive, in a public school under the jurisdiction of a local or regional Board of Education, (B) receiving special education and related services in an institution or facility operating under contract with a local or regional Board of Education, (C) enrolled in a program or school administered by a regional education service center, or (D) receiving special education and related services from an approved private special education program, but shall not include any child receiving educational services from Unified School District #2 or the Department of Mental Health and Addiction Services.

Exclusionary time out means a temporary, continuously monitored separation of a student from an ongoing activity in a non-locked setting, for the purpose of calming such student or deescalating such student's behavior.

Conditions Pertaining to the Use of Physical Restraint and/or Seclusion

- A. School employees shall not use a life-threatening physical restraint on a student.
- B. If any instance of physical restraint or seclusion of a student exceeds fifteen minutes an administrator or his/her designee, or a school health or mental health personnel, or a board certified behavioral analyst, who has received training in the use of physical restraint and seclusion shall determine whether continued physical restraint or seclusion is necessary to prevent immediate or imminent injury to the student or to others. Upon a determination that such continued physical restraint or seclusion is necessary, such individual shall make a new determination every thirty minutes thereafter regarding whether such physical restraint or seclusion is necessary to prevent immediate or imminent injury to the student or to others.
- C. No student shall be placed in seclusion unless:
 - a. The use of seclusion is as an emergency intervention to prevent immediate or imminent injury to the student or to others, provided the seclusion is not used for discipline or convenience and is not used as a substitute for a less restrictive alternative.
 - b. Such student is continually monitored by a school employee during the period of such student's seclusion. Any student voluntarily or involuntarily placed in seclusion or restrained shall be regularly evaluated by a school employee for indications of physical distress. The school employee conducting the evaluation shall enter each evaluation in the student's educational record. Monitor shall

Use of Physical Force

- mean by direct observation or by observation using video monitoring within physical proximity sufficient to provide aid as may be required.
- <u>c.</u> The area in which such student is secluded is equipped with a window or other fixture allowing the student a clear line of sight beyond the area of seclusion.
- e.d. Seclusion shall not be utilized as a planned intervention in a student's behavioral intervention plan, individualized education program, or plan pursuant to Section 504 of the Rehabilitation Act of 1973, as amended from time to time.
- D. School employees may not use a psychopharmacologic agent on a student without that student's consent except (1) as an emergency intervention to prevent immediate or imminent injury to the student or to others, or (2) as an integral part of the student's established medical or behavioral support or educational plan, as developed consistent with section 17a-543 of the Connecticut General Statutes or, if no such plan has been developed, as part of a licensed practitioner's initial orders. The use of psychopharmacologic agents, alone or in combination, may be used only in doses that are therapeutically appropriate and not as a substitute for other appropriate treatment.
- E. Prior to physical restraint or seclusion being used on a student more than four times within twenty school days:
 - a. An administrator, one or more of such student's teachers, the parent/guardian of such student and, if any, a mental health professional shall convene for the purpose of:
 - i. Conducting or revising a behavioral assessment of the student;
 - ii. Creating or revising any applicable behavioral intervention plan; and
 - iii. Determining whether such student may require special education.
 - b. If such student is a child requiring special education or is a child being evaluated for eligibility for special education and awaiting a determination, such student's planning and placement team shall convene for the purpose of (1) conducting or revising a behavioral assessment of the student, and (2) creating or revising any applicable behavioral intervention plan, including, but not limited to, such student's individualized education plan.
- F. The parent/guardian of a student who is placed in physical restraint or seclusion shall be notified not later than twenty-four hours after the student is placed in physical restraint or seclusion. A reasonable effort shall be made to provide such notification immediately after such physical restraint or seclusion is initiated.
- G. School employees shall not use a physical restraint on a student or place a student in seclusion unless he/she has received training on the proper means for performing such

Use of Physical Force

physical restraint or seclusion.

- H. Beginning July 1, 2016, the The Board of Education, and each institution or facility operating under contract with the Board to provide special education for children, including any approved private special education program, shall:
 - a. Record each instance of the use of physical restraint or seclusion on a student;
 - b. Specify whether the use of seclusion was in accordance with an individualized education program;
 - c. Specify the nature of the emergency that necessitated the use of such physical restraint or seclusion; and
 - d. Include such information in an annual compilation on its use of such restraint and seclusion on students.
- I. The Board and institutions or facilities operating under contract with the Board to provide special education for children, including any approved private special education program shall provide such annual compilation to the Department of Education in order to examine incidents of physical restraint and seclusion in schools.
- J. Any use of physical restraint or seclusion on a student shall be documented in the student's educational record. The documentation shall include:
 - a. The nature of the emergency and what other steps, including attempts at verbal deescalation de-escalation, were taken to prevent the emergency from arising if there were indications that such an emergency was likely to arise; and
 - b. A detailed description of the nature of the restraint or seclusion, the duration of such restraint or seclusion and the effect of such restraint or seclusion on the student's established educational plan.
- K. Any incident of the use of restraint or seclusion that results in physical injury to a student shall be reported to the State Board of Education.

Required Training and Prevention Training Plan

Training shall be provided by the Board to school professionals, paraprofessional staff members and administrators regarding physical restraint and seclusion of students. Such training shall be phased in over a period of three years beginning with the school year commencing July 1, 2015, and shall include, but not be limited to:

1. An overview of the relevant laws and regulations regarding the use of physical restraint and seclusion on students. (Such overview is to be provided by the Department of Education on or after July 1, 2015, and annually thereafter, in a manner and form as

Use of Physical Force

prescribed by the Commissioner of Education.)

2. The creation of a plan by which the Board will provide school professionals, paraprofessional staff members, and administrators, or other school employee with training and professional development regarding the prevention of incidents requiring physical restraint or seclusion of students.

Such plan is to be implemented not later than July 1, 2017, and must include a provision to require the training of all school professionals, paraprofessional staff members and administrators in the prevention of such incidents not later than July 1, 2019 and periodically thereafter as prescribed by the Commissioner of Education.

- 3. The Board will create a plan_, to be implemented not later than July 1, 2017, requiring the training of all school professionals, paraprofessional staff members, identified staff, and administrators by regarding the proper means of physically restraining or secluding a student, including, but not limited to:
 - a. Verbal defusing and de-escalation;
 - b. Prevention strategies;
 - c. Various types of physical restraint and seclusion;
 - <u>d.</u> The differences between life-threatening physical restraint and other varying levels of physical restraint;
 - e. The differences between permissible physical restraint and pain compliance techniques;
 - f. Monitoring methods to prevent harm to a student who is physically restrained or in seclusion, including training in the proper means of physically restraining or secluding a student; and
 - g. Recording and reporting procedures on the use of physical restraint and seclusion.
 - a. Various types of physical restraint and seclusion;
 - b. The differences between life-threatening physical restraint and other varying levels of physical restraint;
 - c. The differences between permissible physical restraint and pain compliance techniques; and
 - d. Monitoring methods to prevent harm to a student who is physically restrained or in seclusion, including training in the proper means of physically restraining or secluding a student.

Crisis Intervention Teams

By July 1, 2015, and each school year thereafter, tThe Board requires each school in the District

Use of Physical Force

to identify a crisis intervention team. Such team shall consist of school professionals, paraprofessional staff members, and administrators, or other school trained employee trained in the use of physical restraint and seclusion.

Such teams shall respond to any incident in which the use of physical restraint or seclusion may be necessary as an emergency intervention to prevent immediate or imminent injury to a student or to others.

Each member of the crisis intervention team shall be recertified in the use of physical restraint and seclusion on an annual basis.

Exclusionary Time Out

This policy regarding exclusionary time outs includes the following requirements:

- 1. Exclusionary time outs are not to be used as a form of discipline;
- 2. At least one school employee remain with the student, or be immediately available to the student such that the student and school employee are able to communicate verbally, throughout the exclusionary time out;
- 3. The space used for an exclusionary time out is clean, safe, sanitary and appropriate for the purpose of calming such student or deescalating such student's behavior;
- 4. The exclusionary time out period terminate as soon as possible; and
- 5. If such student is a child requiring special education, as defined in C.G.S. 10-76a, or a child being evaluated for special education, pursuant to C.G.S. 10-76d, and awaiting a determination, and the interventions or strategies are unsuccessful in addressing such student's problematic behavior, such student's planning and placement team shall convene as soon as is practicable to determine alternative interventions or strategies.

Dissemination of Policy

This policy and its procedures shall be made available on the District's website and in the Board's procedural manual. The policy shall be updated not later than sixty (60) days after the adoption or revision of regulations promulgated by the State Board of Education.

(cf. 4148/4248 - Employee Protection)
 (cf. 5141.23 - Students with Special Health Care Needs)
 -Legal Reference: ____Connecticut General Statutes

Use of Physical Force

<u>10-76b State supervision of special education programs and services.</u>

10-76d Duties and powers of boards of education to provide special education programs and services.

10-236b Physical restraint and seclusion of students by school employees. (as amended by PA 17-220 and PA 18-51)

<u>46a-150 Definitions.</u> (as amended by PA 07-147 and PA 15-141)

46a-152 Physical restraint, seclusion and use of psychopharmacologic agents restricted. Monitoring and documentation required.

46a-153 Recording of use of restraint and seclusion required. Review of records by state agencies. Reviewing state agency to report serious injury or death to Office of Protection and Advocacy for Persons with Disabilities and to Office of Child Advocate. (as amended by PA 12-88)

53a-18 Use of reasonable physical force or deadly physical force generally.

53a-19 Use of physical force in defense of person.

53a-20 Use of physical force in defense of premises.

53a-21 Use of physical force in defense of property.

PA 07-147 An Act Concerning Restraints and Seclusion in Public Schools.

PA 15-141 An Act Concerning Seclusion and Restraint in Schools.

<u>State Board of Education Regulations Sections 10-76b-5 through 10-76b-11.</u>

10-76b State supervision of special education programs and services.

10-76d Duties and powers of boards of education to provide special education programs and services.

Use of Physical Force

46a-150 Definitions. (as amended by PA 07-147 and PA 15-141)

46a-152 Physical restraint, seclusion and use of psychopharmacologic agents restricted. Monitoring and documentation required.

46a-153 Recording of use of restraint and seclusion required. Review of records by state agencies. Reviewing state agency to report serious injury or death to Office of Protection and Advocacy for Persons with Disabilities and to Office of Child Advocate. (as amended by PA 12-88)

53a-18 Use of reasonable physical force or deadly physical force generally.

53a 19 Use of physical force in defense of person. 53a 20 Use of physical force in defense of premises. 53a 21 Use of physical force in defense of property. PA 07-147 An Act Concerning Restraints and Seclusion in Public Schools.

PA 15-141 An Act Concerning Seclusion and Restraint in Schools.

State Board of Education Regulations Sections 10-76b-5 through 10-76b-11.

Personnel -- Certified/Non-Certified

Employee Protection

4148(a) 4248

Personnel -- Certified/Non-Certified

Employee Protection

An employee may use reasonable (reasonable physical) force as is necessary to protect himself/herself from attack, to protect another person or property, to quell a disturbance threatening physical injury to others, or to obtain possession of weapons or other dangerous objects upon the person or in the control of a student.

ALTERNATE—An employee may use reasonable physical force only to prevent serious physical injury to themselves, or to another person, or to school districtAmity Regional School District No. 5 (ARSD) property, or to restrain a minor or remove a minor to another area to maintain order.

The goal in any encounter in ARSD is to minimize injury to anyone. Nothing in this policy requires any school personnel to sustain physical injury before applying reasonable force.

Employees should use their physical presence and verbal commands whenever feasible before using physical contact of any type. Each employee is expected to respond to emergency situations with the highest level of good judgment and professional competence.

Employees shall immediately report cases of assault suffered by them in connection with their employment to their Principal or other immediate superior, and to local law enforcement agencies. Such notification shall be forwarded immediately to the Superintendent who shall comply with any reasonable request from the employee for information in the possession of the Superintendent relating to the incident or the persons involved, and shall act as liaison between the employee, the police, and the courts.

No school administrator shall interfere with the right of a teacher or other school employee to file a complaint with the local police authority in cases of threats of physical violence or actual physical violence against such teacher or employee.

As required by law, the Board of Education (Board) will file a report annually with the State Board of Education indicating the number of threats and physical assaults made by students upon teachers, administrators, and other school personnel, and the number of physical assaults involving dangerous

Personnel -- Certified/Non-Certified

Employee Protection

weapons made by students upon other students.

If criminal or civil proceedings are brought against an employee alleging that the employee committed an assault in connection with his/her employment, such employee may request the Board of Education to furnish legal counsel to defend the employee in any civil action or proceeding brought against the employee; within the limits set by law.

The Board of Education shall reimburse an employee for the cost of medical, surgical, or hospital services (less the amount of any insurance reimbursement) incurred as the result of any injury sustained in the course of his/her employment.

Section 52-557b of the General Statutes grants immunity from liability for emergency medical assistance to a person in need of it when the assistance is given by a teacher or other school personnel on the school grounds, in a school building, or at a school function, provided that the teacher or other staff member has completed a course in first aid offered by the American Red Cross, the American Heart Association, the State Department of Health Services, or any municipal health department, as certified by that agency, has such immunity that extends to civil damages for any personal injuries which result from acts or omissions by the person giving the emergency care or first aid, which might constitute ordinary negligence. Such immunity does not apply to acts or omissions constituting gross, willful or wanton negligence.

(c.f. 5144.1 – Restraint and Seclusion)

Personnel – Certified/Non-Certified

Employee Protection

4148(b) 4248

Personnel -- Certified/Non-Certified

Employee Protection (continued)

Legal Reference: Connecticut General Statutes

10-233b Removal of pupils from class.

10-233c Suspension of pupils.

10-233g Boards to report school violence. Reports of principals to police authority.

10-235 10-235 Indemnification of teachers, board and commission members and employees in damage suits; expenses of litigation.

10-236 <u>10-236</u> Liability insurance.

10-236a Indemnification of educational personnel assaulted in the line of duty.

52-557b Immunity from liability for emergency medical assistance, first aid or medication by injection. School personnel not required to administer or render.

53a-18 Use of reasonable physical force or deadly physical force generally.

53a-19 Use of physical force in defense of person.

Policy adopted: April 10, 2006 approved:

AMITY REGIONAL

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Employee Protection

Policy adopted: April 10, 2006 AMITY REGIONAL SCHOOL DISTRICT NO. 5 Woodbridge, Connecticut

<u>Policy adopted: April 10, 2006</u> <u>approved: SCHOOL DISTRICT NO. 5</u>

AMITY REGIONAL

Bylaws of the Board Meeting Conduct

Meetings of the Board of Education (Board) shall be conducted by the Chairperson of the Board of Education in a manner consistent with the adopted Bylaws of the Board and the provisions of the Freedom of Information Act.

All Board meetings shall commence at the stated time or as soon thereafter as a quorum is present and shall be guided by an Agenda which will have been prepared and delivered in advance to all Board Members and other designated persons.

The meetings shall, to the fullest possible extent, enable Members to conduct the business of the Board in an orderly, expeditious manner.

Provisions for permitting any individual or group to address the Board concerning any subject that lies within its jurisdiction shall be as follows:

- 1. A <u>3-3-minute</u> time limit may be allowed to each speaker with a maximum of 20 minutes per meeting being allocated for any one item that appears on the Agenda or falls under the jurisdiction of the Board.
- 2. No boisterous, inappropriate, or disrespectful conduct shall be permitted at any Board of Education meeting. The Chairperson shall not permit actions, which disrupt or interrupt the orderly conduct of the Board meeting. A willful participant in such conduct will be asked to leave the meeting of the Board. In case of a general disturbance the meeting room many be cleared except for non-participating representatives of the press.
- 2.3. Speakers are asked to express themselves in a civil manner, with due respect for the dignity and privacy of others who may be affected by their comments. While it is not the Board's intent to stifle public comment, speakers should be aware that if their statements violate the rights of others under the law of defamation or invasion of privacy, the speaker may be held legally responsible. The Chairperson shall not permit actions which disrupt or interrupt the orderly conduct of the Board meeting. A willful participant in such conduct will be asked to leave the meeting of the Board. In ease of a general disturbance the meeting room many be cleared except for non-participating representatives of the press.
- 3.4. The Board may, by a majority vote, decide to modify the amount of time allotted per item of the Agenda.

Bylaws of the Board

Meeting Conduct

- 4.5. Inquiries or questions may be considered and answered at a future date.
- 5. Speakers may offer objective criticism of district operations and programs, but the Board encourages members of the public to address complaints concerning individual district Amity Regional School District No. 5 (ARSD) personnel through the proper chain of command (see ABOE Policy 1312). The Chairperson may direct the member of the public to the appropriate means to address concerns brought before the Board; however the Board will not respond with action during public comment, but will take comments under advisement and when possible clarify issues. (alternate—The Board will not respond to any comments made during the public comment, except to clarify issues.)

(cf. 1312 - Public Complaints)

(c.f. 2100 – Administrative Staff Organization)

(cf. 9321 - Time, Place, Notification of Meetings)

(cf. 9322 - Public and Executive Sessions)\

(cf. 9323 - Construction of the Agenda)

Legal Reference:	Legal Reference: Connecticut General Statutes 1-200 Definitions. 1-206 Denial of access of public records or meetings. Notice.						
Appeal.							
	1-210 Access to public records.						
	1-225 Meetings of government agencies to be public.						
	19a-342 Smoking prohibited in certain places. Sign required.						
Penalty.							
	1-231 Executive sessions.						
	1-232 Conduct of meetings (re disturbances).						
	10-224 Duties of the Secretary						

Connecticut General Statutes

1-200 Definitions

1-206 Denial of access of public records or meetings. Notice. Appeal.

Bylaws of the Board

Meeting Conduct

9325(b)

Bylaws of the Board Meeting Conduct

1-201 Access to public records

1-225 Meetings of government agencies to be public

1-226 Recording, broadcasting or photographing meetings

19a-342 Smoking prohibited in certain places. Sign required. Penalty 1-231 Executive sessions 1-232 Conduct of meetings (re disturbances) 10-224 Duties of the Secretary

Personnel - Non-Certified

Dismissal/Suspension

Support staff dismissal procedures and employee terminations or suspensions are the responsibility of the Superintendent of Schools, or designee, and shall be in accordance with current state statutes and negotiated employee contracts and with appropriate consideration of an affected employee's constitutional and due process rights and protections.

(cf. 4214 Assignment/Transfer/Reassignment) (cf.4118.11 Nondiscrimination/Equal Employment Opportunity) (cf.4118.112 Sexual Harassment) (cf. 4118.231 Alcohol, Drugs, and Tobacco) (c.f. 4118.232 Drug-Free Workplace)

Personnel – Non-Certified

Title I Paraprofessionals

A Title I paraprofessional is an individual who provides instructional support for students in a Title I Schoolwide or Targeted Assistance Program, supported with Title I, Part A funds.

Title I paraprofessionals may perform the following instructional support duties:

- One-on-one tutoring for eligible students if the tutoring is scheduled at a time when the student would not ordinarily be receiving instruction from the regular teacher
- Assist in classroom management
- Conduct parent involvement activities
- Assist in computer instruction
- Provide instructional support in a library or media center
- Act as a translator
- Provide instructional support services under the direct supervision of qualified teachers

Title I paraprofessionals may assume limited non-instructional duties, even if they benefit non-Title I students, in the same proportion to their total work time as non-Title I paraprofessionals.

Title I paraprofessionals do not include individuals who have only non-instructional duties, such as providing technical support for computers, providing personal care services, or performing clerical duties.

Oualifications

Title I paraprofessionals must have earned a secondary school diploma or its recognized equivalent (except for those who act as translators to enhance the participation of limited English proficient students or whose activities consist solely of conducting parent involvement activities). In addition, paraprofessionals providing personal care service, serving in a clerical capacity or serving as a cafeteria or bus aide, on a full time basis, are exempt from these requirements.

Title I paraprofessionals hired after January 8, 2002 must have:

- Completed at least two years of study at an institution of higher education or obtained an associate's or higher degree; or
- Demonstrated through a formal local academic assessment the knowledge of and ability to assist in instructing, as appropriate:
 - o Reading/language arts, writing and mathematics; or
 - o Reading readiness, writing readiness, and mathematics readiness

In addition, if it is determined that a new paraprofessional, to be hired by Amity Regional School District No. 5 (ARSD), has met the Title I qualification requirements in another school district, that individual will be considered to have met the requirements if hired by ARSD.

These qualifications do not apply to paraprofessionals working in Head Start programs, unless said program is jointly funded with Title I, Part A funds and the paraprofessional's

Policy adopted:

Personnel - Non-Certified

salary is paid with Title I, Part A funds.

Notice to Parents

An annual written notice shall be provided to parents of students enrolled in a Title I Schoolwide or Targeted Assistance Program telling them they may request information about any paraprofessionals who provide instructional support for their child. The notice may be combined with a notice regarding Title I teacher qualifications.

Legal Reference: 42 U.S.C. 653(a) Personal Responsibilities and Work Opportunity

Reconciliation Act

15 U.S.C. et. seq., Fair Credit Reporting Act

Section 1111(g)(2)(M), ESEA

20 C.F.R. 200.59 Federal Regulations

Existing policy, number 4250 adopted 4/10/06, appropriate as written.

Personnel -- Non-Certified

Leaves and Vacations

Unauthorized leaves may be grounds for disciplinary action up to and including termination.

Policy adopted:

AMITY REGIONAL SCHOOL DISTRICT NO. 5 Woodbridge, Connecticut