# Board of Education Meeting

Wednesday, December 3, 2025 7:00 PM
BOE Auditorium and via Zoom Meeting Platform, 129 Church Street, Bristol, CT 06010

1. **CALL TO ORDER/PLEDGE OF ALLEGIANCE/MOMENT OF SILENCE**
2. **STAFF AND STUDENT RECOGNITION**
3. **APPROVAL OF MINUTES**
4. **COMMITTEE REPORTS**
5. **STUDENT REPRESENTATIVE REPORTS**
6. **CHAIR REPORT**
7. **SUPERINTENDENT REPORT**
8. **CONSENT AGENDA**

8.1. PERSONNEL

8.1.a. Administrative Resign

8.1.b. Teacher Retirement

8.1.c. Teacher Resignations

8.1.d. Teacher Hires

8.1.e. A-2 Resignations

8.1.f. A-2 Hire

8.1.g. A-3 Resign

8.2. GRANTS

8.2.a. Alliance Grant

8.2.b. McKinney -Vento Grant

9. **PUBLIC COMMENT**
10. **DELIBERATED ITEMS/DISTRICT LEADERSHIP TEAM REPORTS**

10.1. Pupil Personnel Services Report

10.2. BAIMS Music 2028 Europe Trip

10.3. Redistricting Option

10.4. Fall Sports Presentation

10.5. Regular Board of Education 2026 Meeting Dates

11. **CURRICULUM REVISION**

11.1. Personal Finance and Investment

11.2. PLTW Civil Engineering and Architecture

12. **POLICY REVISION**

12.1. Policy 5144.12 – Restorative Justice Practices

12.2. Policy 4212.42 - Drug and Alcohol Testing for Bus Drivers

12.3. Policy 4113.12 — Minimum Duty-free lunch periods for teachers and other certified staff

12.4. Policy 3542.43- Charging Policy Food Service

12.5. Policy 6141.52: Challenging Curriculum

12.6. Policy 6172.1: Gifted and Talented Students

13. **NEW BUSINESS**

13.1. Appointments to BAIMS Project Building Committees

13.2. Appointments to Edgewood Pre-K Project Building Committees

13.3. Appointments to NEMS Project Building Committees

13.4. Appoint BOE Commissioner to the BCHS Roof Replacement Project Committee

14. **INFORMATION/LIAISON REPORTS**

15. ***EXECUTIVE SESSION***

16. **ADJOURNMENT**

*The minutes presented within this document summarize the discussion of the Special Board of Education meeting. To view the meeting in its entirety and hear full reports, please click the following link: Special BoE Meeting 11/12/25Passcode: Q46@SZpX*

Bristol Board of Education
Bristol, Connecticut
Wednesday, November 12, 2025 – 5:15 p.m.
Special Meeting Minutes

A Special Board of Education meeting was held on Wednesday, November 12, 2025 at 5:15 p.m. in the Board of Education Auditorium located at 129 Church Street, Bristol, Connecticut and via the Zoom meeting platform.

**Present:** Chair Shelby Pons, Commissioners: Maria Simmons, Jill Fitzsimons-Bula, Kristen Giantonio, Kara Ledger, Lorianne Osenkowski, Barbara Tedesco and Jennifer Van Gorder.

**Also Present**: Superintendent Iris White and Deputy Superintendent Mary Hawk

1. **CALL TO ORDER AND PLEDGE OF ALLEGIANCE**
   Chair Pons called the Special Meeting to order at 5:15 p.m. Meeting attendees stood for the Pledge of Allegiance.

2. **ELECTION OF BOARD OFFICERS**
   Chair Pons briefly explained the process of nominations of Board Officers ( Chair, Vice Chair, and Secretary). Pons announced that all board officers are to step down when there is a new board in place. Shelby Pons will step down as Chairperson, Maria Simmons will step down as Vice Chair and Jill Fitzsimons- Bula will be stepping down as Secretary. Those are the three positions that we will be voting on tonight.

**Chairman of the Board of Education**

Chair Pons called for nominations for the position of Chairman of the Board of Education.

Commissioner Ledger nominated Shelby Pons to the position of Chairman: Commissioner Simmons seconded the nomination.

Commissioner Van Gorder nominated Maria Simmons to the position of Chairman and explained. Commissioner Giantonio seconded the nomination. Commissioner Simmons did not accept the nomination.

Chair Pons declared the nominations closed and called for discussion

Chair Pons closed the discussion and asked that ballots be distributed to commissioners. Written ballots for the position of Chairman were returned to Superintendent White to be tallied. Superintendent White read the results alphabetically.

| NOMINEE FOR CHAIR | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| **Nominees** | ANDERSON | GIANTONIO | LEDGER | OSENKOWSKI | PONS | SIMMONS | TEDESCO | FITZSIMONS-BULA | VAN GORDER | TOTAL |
| | | | | | | | | | | |
| **Commissioner ANDERSON** | | | | | | | | | | |
| **Commissioner FITZSIMONS-BULA** | | | | | | | | | | |
| **Commissioner GIANTONIO** | | | | | | | | | | |
| **Commissioner LEDGER** | | | | | | | | | | |
| **Commissioner OSENKOWSKI** | | | | | | | | | | |
| **Commissioner PONS** | | | X | | X | X | X | X | | 5 |
| **Commissioner SIMMONS** | | X | | X | | | | | X | 3 |
| **Commissioner TEDESCO** | | | | | | | | | | |
| **Commissioner VAN GORDER** | | | | | | | | | | |
| | | | | | | | | | | |

Superintendent White announced that Shelby Pons was elected Chairman of the Board of Education.

**Vice Chair of the Board of Education**

Chair Pons called for nominations for the position of Vice Chair of the Board of Education

Chair Pons nominated Maria Simmons to the position of Vice Chair; Commissioner Fitzsimons- Bula seconded the nomination.

Chair Pons declared the nominations closed and called for discussion

Chair Pons closed the discussion and asked that ballots be distributed to commissioners. Written ballots for the position of Vice Chair were returned to Superintendent White to be tallied. Superintendent White read the results alphabetically.

| NOMINEE FOR VICE CHAIR | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| **Nominees** | ANDERSON | GIANTONIO | LEDGER | OSENKOWSKI | PONS | SIMMONS | TEDESCO | FITZSIMONS-BULA | VAN GORDER | TOTAL |
| | | | | | | | | | | |
| **Commissioner ANDERSON** | | | | | | | | | | |
| **Commissioner FITZSIMONS-BULA** | | | | | | | | | | |
| **Commissioner GIANTONIO** | | | | | | | | | | |

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|---|---|---|---|---|---|---|---|---|---|---|
| **Commissioner LEDGER** | | | | | | | | | | |
| **Commissioner OSENKOWSKI** | | | | | | | | | | |
| **Commissioner PONS** | | | | | | | | | | |
| **Commissioner SIMMONS** | | **X** | **X** | **X** | **X** | **X** | **X** | **X** | **X** | **8** |
| **Commissioner TEDESCO** | | | | | | | | | | |
| **Commissioner VAN GORDER** | | | | | | | | | | |
| | | | | | | | | | | |

Superintendent White announced that Maria Simmons was elected Vice Chair of the Board of Education

**Secretary of Board of Education**

Chair Pons called for nominations for the position of Secretary of the Board of Education.

Chair Pons nominates Jill Fitzsimons-Bula to the position of Secretary; Commissioner Ledger seconded the nomination.

Commissioner Giantonio nominates Lorianne Osenkowski to the position of Secretary; Commissioner Van Gorder seconded the nomination

Chair Pons declared the nominations closed and called for discussion

Chair Pons closed the discussion and asked that ballots be distributed to commissioners. Written ballots for the position of Secretary were returned to Superintendent White to be tallied. Superintendent White read the results alphabetically.

| | **NOMINEE FOR SECRETARY** | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| **Nominees** | **ANDERSON** | **GIANTONIO** | **LEDGER** | **OSENKOWSKI** | **PONS** | **SIMMONS** | **TEDESCO** | **FITZSIMONS-BULA** | **VAN GORDER** | **TOTAL** |
| | | | | | | | | | | |
| **Commissioner ANDERSON** | | | | | | | | | | |
| **Commissioner FITZSIMONS-BULA** | | | **X** | | **X** | **X** | **X** | **X** | | **5** |
| **Commissioner GIANTONIO** | | | | | | | | | | |
| **Commissioner LEDGER** | | | | | | | | | | |
| **Commissioner OSENKOWSKI** | | **X** | | **X** | | | | | **X** | **3** |
| **Commissioner PONS** | | | | | | | | | | |
| **Commissioner SIMMONS** | | | | | | | | | | |

| | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| **Commissioner TEDESCO** | | | | | | | | | | |
| **Commissioner VAN GORDER** | | | | | | | | | | |
| | | | | | | | | | | |

Superintendent White announced that Jill Fitzsimmons-Bula was elected Secretary of the Board of Education

**3. COMMITTEE ASSIGNMENTS**
Chair Pons read the revised Committee Assignments.

**Finance & Operations Committee**
Mara Simmons, Chair
Russell Anderson
Kara, Ledger

**Alternate**
Jill Fitzsimons - Bula

**School, Family & Community Partnerships (SCFP)**
Barbara Tedesco, Chair
Jennifer Van Gorder
Kara Ledger

**Alternate**
Maria Simmons

**School Safety Committee**
Jill Fitzsimons - Bula, Chair
Kristen Giantonio
Lorianne Osenkowski

**Alternate**
Barbara Tedesco

**Policy Committee**
Jill Fitzsimons - Bula, Chair
Maria Simmons
Lorianne Osenkowski

**Alternate**
Kara ledger

**Student Achievement & Outcomes Committee**
Kara Ledger, Chair
Barbara Tedesco
Jill Fitzsimons - Bula

**Alternate**
Russell Anderson

Commissioner Ledger makes a motion to accept the committees as presented and Commissioner Tedesco seconded.

Questions and discussion followed regarding the choices for committee assignments.

The Board of Education voted to approve Committee Assignments as read with five (5) Commissioners ( Ledger, Tedesco, Fitzsimons-Bula, Simmons, and Pons **IN FAVOR** of the motion; and three (3) Commissioner ( Van Gorder, Osenkowski, and Giantonio) **OPPOSED.**

**4. DISCUSSION AND POSSIBLE APPOINTMENT OF THE INSTRUCTIONAL SUPERVISOR OF MATH, SCIENCE, AND INFORMATION TECHNOLOGY**

Superintendent White recommends that the Board of Education approve the appointment of Ms. Debra Vitale as Instructional Supervisor for Mathematics, Science, and Informational Technology

Commissioner Ledger makes a motion and second by Commissioner Simmons. Motion passed unanimously.

Questions and discussion followed regarding the interview process for the position.

**5. DISCUSSION AND POSSIBLE APPOINTMENT OF THE ELEMENTARY ( PK-5) HUMANITIES SUPERVISOR**

Superintendent White recommends that the Board of Education approve the appointment of Mr. Zachary Maher as Elementary (PK-5) Humanities Supervisor.

Chair Pons makes a motion and second by Commissioner Fitzsimons-Bula. Motion passed unanimously.

Questions and discussion followed regarding the interview process for the position.

**6. ADJOURNMENT**

There being no other business to come before the Board, the Special Board of Education Meeting should adjourn. ( 6:00 p.m.)

Respectfully Submitted,

Recording Secretary
Bristol Board of Education

The minutes presented within this document summarize the discussion of the Regular Board of Education meeting. To view the meeting in its entirety and hear full reports please click the following link: 11/5/25- Regular BoE Meeting Passcode: ?F$6f&?!

Bristol Board of Education
Bristol, Connecticut
Wednesday, November 5, 2025 – 7:00 p.m.
Regular Meeting Minutes

The Bristol Board of Education regular meeting was held on Wednesday, November 5, 2025 at 7:00 p.m. in the Bristol Board of Education Auditorium located at 129 Church Street and via Zoom Meeting Platform.

**Present:** Chair Shelby Pons, Commissioners: Russel Anderson, Eric Carlson, Jill Fitzsimons-Bula, Kristen Giantonio, Lorianne Osenkowski, Maria Simmons, Dante Tagariello, and Jennifer Van Gorder

**Also, Present:** Superintendent Iris White and Deputy Superintendent Mary Hawk

**Call to Order/Pledge of Allegiance:**
Chair Pons called the meeting to order at 7:00 p.m. and asked the audience to stand for the Pledge of Allegiance. A moment of silence was in memory of Nancy Winters Denehy – BE, BC Latin Teacher, School Counselor, Head of Guidance.

**Staff and Student Recognition**
Superintendent White Recognition's are:
1. Commissioner Kristen Giantonio- Recipient of the 2nd Annual Doriana Award Recognizing the Impact of an Outstanding Parent Advocate.

**Approval of Minutes**
**September 10, 2025 – Regular Meeting Minutes**
The Board of Education voted to approve the September 10, 2025 – Regular Meeting Minutes as written.
***Motion made by Shelby Pons and second by Kristen Giantonio. Motion passed unanimously.***

October 1, 2025 – Regular Meeting Minutes
The Board of Education voted to approve the October 1, 2025 – Regular Meeting Minutes as written.
***Motion made by Shelby Pons and second by Kristen Giantonio. Motion passed unanimously.***

October 30, 2025 – Special Meeting Minutes
The Board of Education voted to approve the October 30, 2025 – Regular Meeting Minutes as written.

***Motion made by Shelby Pons and second by Kristen Giantonio. Motion passed unanimously.***

**Committee Reports**

**School, Family, and Community Partnerships** – Commissioner Simmons reported that the committee met on October 22, 2025 and discussed aligning the bylaw language to the committee. The committee developed a goal and action plan to achieve accomplishments.

**Student Achievement – Commissioner Fitzsimons** – Bula reported that committee met on October 15, 2025 primarily focusing on 24-25 Smarter Balance Assessment achievement growth data and our last 25-26 date.

**Policy Committee** – Commissioner Fitzsimons – Bula reported that the committee met on October 22nd. Two policies were moved forward to the full board for consideration and approval and will further discuss in the agenda.

**School Safety Committee** – Commissioner Osenkowski reported that the committee met on October 8th. Mr. Cabelus provided safety updates and a policy for armed security guards was presented, discussed, and voted on which then went to policy committee. Our next meeting will be January 14th 2026.

**Finance and Operations Committee** – Commissioner Carlson reported that the committee is financed and operating; it's all good.

**Student Representatives Report**

**Bristol Central**

Bristol Central Senior Representative Amelia Browne presented the monthly Bristol Central Student Representative Report. Highlights of report included preparing for the upcoming holiday this month. The athletic leadership council is prepping a Thanksgiving food drive. Interact Club, a volunteer club are organizing a Powderpuff Football game where the girls play football and boys cheerlead. All proceeds are going to the Make – A – Wish foundation. They have raised over $60,000 for the foundation with this specific event. Later in the month, the club will start gathering resources like baskets, turkey, gravy and more to give to a family in need. They working to give a family everything they need for a perfect Thanksgiving dinner. Dance and Cheer Team are both collaborating for the football season halftime shows. The next appearance together will be during the Battle of the Bell and as well prepping for the holiday pre-rally. Last Friday, DECA is the business club, they attended a fall leadership conference about 1k students attended that are from Connecticut.

**Bristol Eastern**

Bristol Eastern Senior Representative Paige Ansah presented the monthly Bristol Eastern Student Representative Report. Highlights of report included past, current and upcoming events at BE. Paige reported that their homecoming on October 18th was a success of a theme of Rhythms of Rio and Student Council did an amazing job setting up and managing the event. Student Council is also helping out with Pajama Day for this year. Pajama day will be on Friday, December 12th. Students and Teachers are encouraged to try and donate to help raise funds for the Connecticut Children's Medical Center this holiday season. BE's Model United Nations have been working hard to fundraising for their 4-day trip to attend the Model United Nations Conference in New York. BE football team won their first game of the season away against RAM high school last Saturday, November 1st. With fall sports ending, winter sports restarting again soon. Wrestling and Boys Basketball have the meeting on October 28th, and trials will begin soon for basketball. Indoor Track has a meeting this coming Monday, November 10th and Winter Cheer Trials are on November 19th and 20th.

**<u>Chair Report</u>**

The Board made significant progress over the past year, highlighted by the successful implementation of the first open-ended, anonymous school climate survey for educators, which received over 500 responses. The board also addressed critical facility needs, including advocating for the renovation of the preschool building, and supported enhanced school safety district-wide through the successful implementation of ALICE training. These efforts reflect a commitment to ensuring safe and supportive learning environments for all.

Chair Pons commended Superintendent White for her strong leadership during the 2024-25 school year, noting her integrity and professionalism. The Superintendent has solidified a highly capable cabinet, including in Human Resources, Chief of Talent Management Joe Grabowski and promoted Director of Finance Jodi Bond. Under Superintendent White's leadership, teacher retention rates have improved, safety plans have been strengthened, and she continues to create opportunities for community engagement, as exemplified by her outreach to the Diversity Council.

The report included a farewell to two departing commissioners, Dante Tagariello and Eric Carlson, thanking them for their dedication. Mr. Tagariello's financial expertise and knowledge of Robert's Rules were praised, while Mr. Carlson was recognized for his expertise in operations, facilities, and exemplary bipartisan leadership over six years. Looking ahead, the board will welcome two new members, former teachers Barbara Tedesco and Kara Ledger, who will be sworn in next week. A special board meeting will be scheduled on the preceding Wednesday to ensure a smooth transition and discuss future priorities. The Chair encouraged all returning and newly elected commissioners to consider serving on a committee, as committee work is critical for the success of the schools and allows for public transparency, with all meetings being recorded and available online.

**Superintendent Report**

The Superintendent provided an update on 2025-2026 priorities, focusing on community partnerships. This includes a collaborative discussion with John Prescott from the United Way about a potential partnership for guest readers on Read Across America Day and securing book donations from corporate sponsors. The Superintendent also met with City Diversity Council representatives, Chair Marcus Patton and Dave Rackliffe, to discuss how the Council can partner to support youth, especially by reconnecting with the high schools to gather student feedback on diversity and potentially involve students in Council meetings. Furthermore, Erica Treannie and Cecilia Grey from the Office of Climate and Culture are organizing a citywide food drive on November 14th to support families in need, strategically scheduled to replenish local agency supplies. The Central Office is also conducting a November food drive for the Agape House, and a visit from the Connecticut Democracy Kid Governor Tour at Mountain View School engaged 4th and 5th-grade students on the importance of voting.

A successful district-wide ALICE training for staff was held, with recognition extended to Stephen Cabelus (Director of Safety and Security) and Deputy Superintendent Mary Hawk. The training involved scenarios, building familiarization, and lesson plan review led by certified instructors. Pending plans for ALICE include scheduling a makeup training session, hosting an in-person parent information meeting on Thursday, November 13th, at the BOE Building, and implementing consistent K-12 student instruction through classroom lesson plans. It was clarified that students will not participate in hands-on scenarios, and the district is planning for the first hour's lockdown drills.

The Superintendent formally recognized the departing BOE Commissioners. Dante Tagariello was praised for being kind, helpful with financial/budgeting matters, quick-witted, and an invaluable mentor. Eric Carlson was thanked for his constant support, serving as a "father figure," being a man of principle, and consistently putting people and causes above politics, also noting his service on building committees. Finally, the Superintendent offered congratulations to re-elected Commissioners Jill Fitzsimons-Bula and Jennifer Van Gorder, new Commissioners Tara Ledger and Barbara Tedesco, Board Liaison Eric Rosengren, and incoming Mayor Alan Zappo Sassasu, while also thanking outgoing Mayor Jeff Caggiano for his years of service.

**Consent Agenda**

Chair Pons called for a motion to approve the Consent agenda, which include items from 8.1.a – 8.1.e

***Motion made by Dante Tagariello and second by Eric Carlson. Motion passed unanimously.***

***8.1 Personnel***

**8.1.a Teacher Retirement**

Borosvsky, Penny – BEHS/GH – Speech and Language Pathologist effective June 30, 2026
Pecevich, Brenda – STAF – Special Education Teacher effective June 30, 2026

***The Board of Education voted to accept the Teacher Retirement***

***Motion made by Dante Tagariello and second by Eric Carlson. Motion passed unanimously.***

**8.1.b Teacher Resignations**
Abrams, Nicole – WB – Grade 8 Mathematics Teacher effective September 30, 2025
Pezza, Christopher – NEMS - .5 Math Intervention Specialist effective October 18, 2025
Stroh, Brian – EPH – Special Education Teacher effective October 18, 2025
Tevnan, Abbryann – STAF – Special Education Teacher effective October 31, 2025

***The Board of Education voted to accept the Teacher Resignations.***

***Motion made by Dante Tagariello and second by Eric Carlson. Motion passed unanimously.***

**8.1.c A-2 Resignations**
Baker, Lorenzo – BEHS – Grade 10 Co-Advisor effective August 26, 2025

***The Board of Education voted to accept the A-2 Resignations***

***Motion made by Dante Tagariello and second by Eric Carlson. Motion passed unanimously.***

**8.1.d A-2 Hire**
Anderson, Tarra – BEHS – Grade 10 Co-Advisor effective September 30, 2025
Dornfield, Jessica – BCHS – Grade 9 Co-Advisor effective September 25, 2025
Mirmina, Shawn – BCHS - Grade 9 Co-Advisor effective September 25, 2025
Parsons, Rebecca – NEMS – Climate Coordinator effective September 29, 2025

***The Board of Education voted to accept the A-2 Hire***

***Motion made by Dante Tagariello and second by Eric Carlson. Motion passed unanimously.***

**8.1.e Teacher Leave of Absence Requests**
Nugent, Alyssa – BEHS – Social Studies Teacher effective March 16, 2026 through April 9, 2026

***The Board of Education voted to accept the Teacher Leave of Absence Requests***

***Motion made by Dante Tagariello and second by Eric Carlson. Motion passed unanimously.***

**<u>October 1 Enrollment Count for the 2025-2026 School Year</u>**
Joseph Grabowski presented the October 1 Enrollment Count for the 2025-2026 School Year report. The October 1st, 2025, enrollment report shows a total of 7,598 students, excluding 270 magnet students. Middle School (6-8) saw the largest change, with a 3% increase (49 students), mainly at Chippins Hill. Elementary (K-5) enrollment decreased by about 2% (72 Students), but this change did not necessitate reducing the number of classrooms. High School (9-12)

enrollment also decreased by about 2.5% (59 students). Pre-K enrollment decreased significantly (35 students) due to the conversion of Pre-K 4 to a full-day program and limited space at the current Giamatti location. The total enrollment, including all students tied to the district (enrolled, magnet, and outplaced for IEP support), is closer to 7,868.

Question followed.

**Bridge Grant**

Amy Martino, Director of Pupil Personnel Services presented a great opportunity. This grant is funded through the State of Connecticut, offered $40,000 across two years. Enhances student transitions from high school and middle to higher education and career readiness.

Questions followed.

**Public Comments**

Chair Pons reads the rules for public comments to the audience.

1. Domna Hamzy spoke on the behalf of her father and family, thanking the Board for honoring Alex Hamzy by naming the Northeast Middle School Gymnasium after him.
2. Alan Ruddewicz spoke his concerns on the redistricting process for Northeast Middle School.
3. Mike Arashinko expressed his support for Policy 5142.41-armed security officers in Bristol Public Schools.
4. Jen Tagariello gave her remarks for the newly elected and re-elected Board of Education Commissioners, as well as giving remarks to the two commissioner who will be leaving the board. Eric Carlson and Dante Tagariello.
5. Marie O'Brien thanks Commissioner Carlson and Tagariello for their service on the Bristol Board of Education.
6. Eric Verrone expressed his concern regarding Policy 5142.41-armed security officer
7. Morris Patton gave his remarks for Commissioner Carlson and Tagariello.

**Deliberated Items/District Leadership Team Reports**

**Pupil Personnel Services Report**

Amy Martino presented the monthly Pupil Personnel Services Report. Mrs.Martino reported as of October 1st 2025, 1,763 of the 7,872 enrolled Bristol Students are identified as requiring Special Education Programming. This enrollment reflects 22.40% of the total BPS student population. As of October 1st, 119 students with disabilities required out-of-district placements at private special education school programs. There were 93 students requiring special education programming services at other public out-of-district schools, including magnet schools. During the month of September 2025, 22% of newly registered students were identified as students with special education programming needs at the time of registration with no student receiving their programming and services at an out-of-district special education school program. During the month of September, there were 49 211 calls and 0 911 calls.

As of October 1, 2025, all budget lines represented are trending as expected. The Extended School Year, Pre-School, Section 504 and Equipment were removed from the chart as the Extended School year line has all expenditures accounted for at this time. As noted during the September 1st report, the Preschool line is over by $54, 905.47 due to salaries being encumbered. The Section 504 and Equipment lines were unremarkable/unchanged for this month's reporting.

**Redistricting Report**
Superintendent White introduced MP Planning. Bristol Public Schools entered into a contract with MP Planning group led by Patrick Gallagher and Michael Zuba, who assisted with the Phase 1 redistricting. The focus of their work on Phase 2 is to develop redistricting boundaries for Phase 2 of the Reimagine BPS plan that will go into effect for the 2026-2027 school year.

MP Planning group developed updated 10-year enrollment projections, established enrollment targets for the elementary and middle school.

**NEMS Phase III FF&E approval**
Tara Landon, Operations and Facilities Manager provided update for this approval. As part of the state requirement for the Pre-bid Conference on November 10th, 12th and 13th, 2025, the school building committee and the BOE must review and approve the final plans and project manuals for Phase III-FF&E. These were shared with the BOE commissioners on October 31, 2025.

Motion made by Eric Carlson and second by Dante Tagariello. Motion passed unanimously.

**<u>Policy Revisions</u>**
**Policy 5142.41-Armed Security Officers**

Chair Pons gave a brief understanding of the revision for the policy,

Mary Hawk gave an overview for the purpose this policy and has passed the podium to Director of Security, Stephen Cabeleus and Chief Morrello, Bristol Police department discussed the purpose of having armed security officers to ensure a secure and confident learning environment.

Motion made by Jill Fitzsimons- Bula and seconded by Lorianne Osenkowski. Motion passed unanimously.

**Policy 6145.2 – Extracurricular and Cocurricular**

Carly Fortin presented the Policy 6145.2 – Extracurricular and Cocurricular. Fortin opens the discussion on eligibility to participate in extracurricular and cocurricular activities.

Middle school administrators propose removing the standard of conduct from eligibility rules to align with high school policy, which focuses only on academics. Misbehavior can still limit participation case by case, but removing the standard of conduct prevents students from losing eligibility due to a report card mark. The goal is to keep students connected and supported through extracurricular activities.

Motion made by Jill Fitzsimons-Bula and second by Kristen Giantonio. Motion passed unanimously.

## New Business

**Naming of the new Northeast Middle School Gym, the Sergeant Alex Hamzy Gymnasium**
Tara Landon presented the New Business. This was approved in August, at the building committee meeting and discussed with Mayor Caggiano. She asks the board with full approval of Naming the new Northeast Middle School Gym, the Sergeant Alex Hamzy Gymnasium.

Motion made by Eric Carlson and second by Russel Anderson. Motion Passed Unanimously.

**Naming of Greene-Hills Gym, the Lieutenant Dustin DeMonte Gymnasium**
Superintendent White presented the New Business. Superintendent was able to connect with Mrs.DeMonte for this opportunity. She asks the board for full approval of Naming Greene-Hills Gym, the Lieutenant Dustin DeMonte Gymnasium.

Motion made by Kristen Giantonio and second by Eric Carlson. Motion passed Unanimously.

## Information/Liaison Reports

Commissioner Simmons gave a comprehensive report on South Side School and Bristol Eastern.

Chair Pons gave a Liaison report about BAIMS student art projects.

Commissioner Carlson and Tagariello gave their last remarks with the Bristol Board of Education.

## Adjournment

There being no other business to come before the Board, the Regular Board of Education Meeting should adjourn. ( 9:30 p.m.)

Respectfully Submitted,

Recording Secretary
Bristol Board of Education

**BRISTOL PUBLIC SCHOOLS**
**Bristol, Connecticut**

December 3, 2025

| | |
|---|---|
| X | **Decision Item** |
| | **Information Item** |

## AGENDA REPORTING FORM

**TOPIC: Administrative Resignation**

BACKGROUND:

Madruga, Matthew – EPH – Interim Principal effective November 28, 2025

**COST:** ______________ **FUNDING SOURCE:** ______________

**RECOMMENDATIONS/COMMENTS:**

**ATTACHMENTS:** Letter

**TOPIC PRESENTER:** Joseph Grabowski

**CONTACT NUMBER:** 860-584-7022

**ACTING SUPERINTENDENT:** Iris White
Iris White

| Bristol Board of Education, Bristol CT | |
|---|---|
| Presented at Board Meeting: | |
| Approved: | |
| Order Filed: | |
| Referred to: | |

Dear Iris,

I am writing to formally resign from my position as an administrator for Bristol Public Schools, effective November 28, 2025. This decision was not made lightly, as I have greatly valued my time working for BPS and the opportunity to serve our students, staff, and families.

After thoughtful consideration, I have accepted a position in another school district closer to my home. This change will allow me to spend more time with my family, while continuing to grow professionally. I am writing to express my sincere gratitude for the support, collaboration, and leadership I have experienced during my time here.

Thank you for the opportunity to be a part of such a dedicated and wonderful community. I remain committed to ensuring a smooth transition and will do everything I can to support the students, staff, and families at Hubbell School.

With appreciation,

Matthew Madruga

**BRISTOL PUBLIC SCHOOLS**
**Bristol, Connecticut**

December 3, 2025

| | |
|---|---|
| X | **Decision Item** |
| | **Information Item** |

## AGENDA REPORTING FORM

**TOPIC: Teacher Retirement effective December 31, 2025**

BACKGROUND:

Freedman, Margaret – EPH – Art Teacher

**COST:** ____________ **FUNDING SOURCE:** ____________

**RECOMMENDATIONS/COMMENTS:**

**ATTACHMENTS:** Letter

**TOPIC PRESENTER:** Joseph Grabowski

**CONTACT NUMBER:** 860-584-7022

**ACTING SUPERINTENDENT:** Iris White

Iris White

| Bristol Board of Education, Bristol CT | |
|---|---|
| Presented at Board Meeting: | |
| Approved: | |
| Order Filed: | |
| Referred to: | |

Joe, Ken, Courtney and Mike:

Please accept this letter as formal notification of my Retirement from my employment with the Bristol school district. My requested retirement date is December 31, 2025. I am submitting my retirement for the following reason: Retirement.

Sincerely,
Margaret Freedman
Elementary Art Techer

**BRISTOL PUBLIC SCHOOLS**
**Bristol, Connecticut**

December 3, 2025

| | |
|---|---|
| X | **Decision Item** |
| | **Information Item** |

# AGENDA REPORTING FORM

**TOPIC: Teacher Resignations**

BACKGROUND:

Hogan, Larissa – BEHS – Psychologist - effective December 12, 2025
Miller, Erin – WB – Psychologist – effective December 31, 2025
Owens, Emily – BEHS – Psychologist – effective January 2, 2026

**COST:** ______________________ **FUNDING SOURCE:** ______________________

**RECOMMENDATIONS/COMMENTS:**

**ATTACHMENTS:** Letters

**TOPIC PRESENTER:** Joseph Grabowski

**CONTACT NUMBER:** 860-584-7022

**ACTING SUPERINTENDENT:** Iris White
Iris White

| Bristol Board of Education, Bristol CT | |
|---|---|
| Presented at Board Meeting: | |
| Approved: | |
| Order Filed: | |
| Referred to: | |

Larissa Hogan

Joseph Grabowski
Bristol Public Schools
Office of Talent Management
129 Church Street
Bristol, CT 06010

November 12, 2025

Subject: Resignation from Bristol Eastern High School (School Psychologist)

Dear Mr. Grabowski,

I am writing to inform you of my resignation as school psychologist from Bristol Eastern High School.

I am very appreciative of the opportunity to work in the Bristol Public Schools for the past 18 years. I have been fortunate to work with many wonderful individuals, students, and families throughout my tenure in Bristol. The skills, experiences, and knowledge that I have acquired during my career with the Bristol Board of Education have been integral to the professional I am now, and I am forever grateful.

I anticipate my last day of work at Bristol Eastern to be Friday, December 12, 2025. Thank you for your understanding.

With gratitude,

Larissa Hogan

Erin Miller

December 1, 2025

Iris White, Superintendent of Schools
Bristol Public Schools
129 Church Street
Bristol, CT 06010

Dear Ms. White,

I am writing to formally resign from my position as School Psychologist with Bristol Public Schools effective December 31, 2025. This decision was not made lightly, and I am grateful for the many meaningful opportunities I have had to support students, collaborate with colleagues, and contribute to the Bristol community.

I am thankful for the positive interactions and partnerships I have experienced during my time in Bristol. I value the dedication of those staff members who continually strive to create supportive environments for all students. My hope is that the district will continue to prioritize the well-being of its diverse student population in both policy and practice.

I would like to extend my sincere appreciation to both Dr. Molly Goodine and Mrs. Amy Martino for their support, guidance, and professionalism throughout my tenure. Their leadership created opportunities for growth and helped me navigate many challenging situations with confidence. I am truly grateful for the insight and encouragement they have offered during my time in this role.

Please let me know how I can support a smooth transition in the coming weeks.

Thank you for the opportunity to serve the community of Bristol. I wish the district and its students continued success.

Respectfully,
Erin Miller

Cc: Joseph Grabowski

BPS

Amy Devine <amydevine@bristolk12.org>

## Fwd: Resignation-Emily Owens

1 message

**Joseph Grabowski** <josephgrabowski@bristolk12.org> Sun, Nov 30, 2025 at 9:37 PM
To: Jessica Lemos <jessicalemos@bristolk12.org>, Amy Martino <amymartino@bristolk12.org>
Cc: Amy Devine <amydevine@bristolk12.org>

Hi Jess,

Will you be putting in a recommendation to post for this role?

Thanks,
Joe

**Joseph Grabowski**
Chief of Talent Management
Bristol Public Schools
860-584-7022

Privileged and confidential. If received in error, please notify me by email and delete the message.

---------- Forwarded message ---------
From: **Emily Owens** <emilyowens@bristolk12.org>
Date: Wed, Nov 26, 2025 at 3:56 PM
Subject: Resignation-Emily Owens
To: Joseph Grabowski <josephgrabowski@bristolk12.org>
Cc: Amy Martino <amymartino@bristolk12.org>, Jessica Lemos <jessicalemos@bristolk12.org>

Good afternoon Mr. Grabowski,

I hope this message finds you well. I'm writing to formally submit my resignation from my position as School Psychologist with Bristol Public Schools, effective January 2nd 2026.
This was truly not an easy decision. It has been an honor to support our in-district therapeutic programs and to work alongside such thoughtful, dedicated professionals.

While I am excited for this next step, leaving midyear and a team I care so much about makes this transition bittersweet. Thank you again for the privilege of being part of this district. I will carry with me a deep appreciation for all of the relationships I have built and for the work we have been able to accomplish together.

Sincerely,

Emily Owens, PsyD, NCSP
(860) 584-7876 ext. 622009
Pronouns: she, her, hers
Destinations School Psychologist
Bristol Public Schools, Bristol CT

Information in this email is **privileged and confidential**. If received in error, please notify me by e-mail and delete the message.

**/BRISTOL PUBLIC SCHOOLS**
**Bristol, Connecticut**

December 3, 2025

| | |
|---|---|
| X | **Decision Item** |
| | **Information Item** |

# AGENDA REPORTING FORM

**TOPIC: New Teacher Hire**

BACKGROUND:

Burke, Patrick – EPH – Special Education Teacher (LEAD) effective November 21, 2025
Corey, Jameson – BEHS – School Counselor – effective November 10, 2025

**COST:** ______________ **FUNDING SOURCE:** ______________

**RECOMMENDATIONS/COMMENTS:**

**ATTACHMENTS:** Resumes

**TOPIC PRESENTER:** Joseph Grabowski

**CONTACT NUMBER:** 860-584-7022

**ACTING SUPERINTENDENT:** Iris White
Iris White

| Bristol Board of Education, Bristol CT | |
|---|---|
| Presented at Board Meeting: | |
| Approved: | |
| Order Filed: | |
| Referred to: | |

# Patrick Burke M.S.Ed., BCBA

**EDUCATION:**

Fall, Spring and Summer 2003-2005 completed coursework in Applied Behavior Analysis from University of NorthTexas
Summer 1997- Summer 1998
University of Southern Connecticut University, New Haven, CT
Master of Arts in Special Education

Fall 1989 – December 1993
University of Maine, Orono, ME
Bachelor of Arts in Psychology and in Philosophy

**CERTIFICATION:**

Board Certified Behavior Analyst December 2005
Certificate # 1-05-2156
Special Education teacher. Certified pre-12

**EXPERIENCE:**

**Behavior Consultant/Lead Teacher**

5/2001- present River Street Outreach Program Windsor, CT

- Work with school teams on ages ranging from pre-k through high school.
- Support in a consulting capacity for populations that include the following:
  - Autism
  - Trauma
  - Developmental Disabilities
  - Psychiatric Disorders
  - Attention Deficit Hyperactivity
  - Behavioral/Emotional challenges
- Provide school and home-based behavioral consultation services based on the principles of Applied Behavior Analysis
- Assist in the development of IEP goals based on various assessment tools.
- Conduct Functional Behavior Assessments in order to develop behavior support plans and relevant data collection methods.
- Conduct Ecological Assessments in order to objectively determine individualized support needs for the student.
- Conduct Functional Assessments on socially significant maladaptive behaviors.
- Develop student specific behavior intervention plans.
- Make support decisions utilizing dat analysis and communicating to their support team.

- Develop skill acquisition programs and individualized curriculum materials based on assessment results.
- Facilitate play and social skills groups and develop curriculum based on individual needs.
- Provide consultation to parents and families in order to facilitate carryover of acquisition programs and behavioral interventions to promote skill generalization.
- Developed with Avon Pupil Services Director district wide crisis intervention protocol. Presented to the district.
- Provide professional development and training on topics related to service delivery or student challenges.
- Consulted with Niantic Children's Museum to adapt it to make it more accessible to children on the spectrum.

**Autism Program Lead Teacher**

8/1999 – 5/2001 Glastonbury Public Schools Glastonbury, CT

- Coordinated and conducted screening visits, referral calls, and staff scheduling.
- Assisted with employee recruiting, conducted interviews, and training of new direct care staff
- Designed and facilitated small and large group trainings in the areas of autism, discrete trials, behavior analysis, and classroom-based behavioral interventions.
- Researched, evaluated, and developed new policies, teaching procedures, and program models
- Monitored and ensured consistency of DTI-based programs.
- Included responsibilities of senior therapist which entailed staff supervision, parent training, program development, curriculum-based instruction, and behavioral interventions.
- Provide in home and community programming to individual families.

**Special Education Teacher**

8/1998 – 6/99 LEARN Lyme, CT

- High school special education, resource offsite teacher
- Developed individualized program for high functioning high school student with Asperger's at Community College
- Organized a work experience in a computer lab.
- Developed participation in college clubs.
- Create social skill expectations within his job description.
- Taught classes for high school credit
- Train student on public transportation system

**Behavior Therapist**

6/1997 – 10/1998 River Street Outreach Program Windsor, CT

- Implemented home or school-based Applied Behavior Analysis teaching sessions.

- Responsible for data collection, interpretation, and program book maintenance
- Maintained constant communication with team members, supervisors, and family.
- Conducted training and development in the field of Applied Behavior Analysis

**Special Education Teacher - Internship**

Fall 1997 – June 1998 | Ledyard Public Schools | Ledyard, CT

- Supported teacher with daily classroom activities.
- Assisted special needs children with daily routine.
- Learned to administer Woodcock Johnson and DTLA-4: Detroit Tests of Learning Aptitude at middle school.
- Organized and implemented community excursion for multiple handicap class at high school.
- Wrote and implemented individualized lessons at for multiple handicap students at high school.

**Employment Specialist**

January 1996 – June 1997 | First Step | New London, CT

- Counsel and guide individuals with mental illness in career development.
- Establish community connections and act as liaison for client during employment search
- Provide onsite initial supplemental training.
- Maintain follow up consult and develop solution strategies.

**Employment Specialist**

January 1994 – June 1996 | Seabird Enterprises | Groton, CT

- Counsel and guide individuals with developmental disabilities and autism in career development
- Establish community connections and act as liaison for client in employment searches.
- Provide onsite initial individualized job training and conduct on going follow up consult

**Special Skills:** CPI certified, Proficient in Microsoft Excel, PowerPoint, Word, Presentation skills, De-escalation skills, Data Analysis, Detailed Written Assessments, Communication across student team members and student populations, presentation skills, crisis team management

# Jameson Corey

## Education

**University of Connecticut, 2025**
Master of Arts in Educational Psychology in School Counseling

**University of Connecticut, 2021**
*Bachelor of Science in Allied Health Sciences*
Minor: Human Development and Family Sciences
Honors: *summa cum laude*

## Certification

**068 School Counselor**

## Education Related Experience

**Farmington High School,** Farmington, CT
School Counseling Intern, August 2024-June 2025

- Met with students and provided academic, emotional, and career counseling to help them succeed by working with them to set goals, work through problems, learn professional skills, and more
- Co-presented classroom lessons to all grades on topics such as the postsecondary transition process, course selection, and SchooLinks
- Observed and participated in 504 and PPT meetings, student intervention team meetings, attendance meetings, senior planning meetings, junior planning meetings, and sophomore planning meetings
- Coordinated and attended college and technical school rep visits as well as helped plan a college and career fair
- Collaborated with all department heads to update and revise the school's program of studies documents and website
- Researched and updated school's list of inclusive college programs for students with a disability
- Proctored and assisted testing coordinators in the planning and implementation of the weekend and schoolwide PSA, SAT, and AP Exams

**Carmen Arace Middle School**, Bloomfield, CT
School Counseling Practicum Student, January 2024-May 2024

- Led weekly group counseling sessions with eighth grade boys to facilitate students developing social skills and making connections
- Addressed conflicts between students by facilitating mediations
- Provided weekly check-ins for four students helping them build social and emotional skills
- Observed and assisted supervisor in providing counseling and emotional support to distressed students

**University of Connecticut College Advising Corps, Bristol Eastern High School**, Bristol, CT
College and Career Adviser, July 2022-June 2023

- Conducted one-one-one meetings with 90% of senior class to assist with post-secondary plans
- Advised students throughout the post-secondary process regarding researching schools, applications, resumes, the financial aid process, scholarships, standardized tests, and more
- Managed and analyzed student data using an AmeriCorps database such as college applications, FAFSA completion, and postsecondary decisions
- Assisted school counselors with events such as college representative visits, parent nights, FAFSA workshops, and college readiness workshops

**Health*Forward* AmeriCorps Program**, Central CT Area Health Education Center, Hartford, CT
AmeriCorps Member/Programs Coordinator, August 2021-June 2022

- Planned and led Youth Health Service Corps meetings at EC Goodwin Technical High School, East Hartford High School and Academy of Science and Innovation that focused on health topics and careers and allowed students to participate in health-related activities

- Presented to health classes in high schools located in Central CT such as East Hartford, Bristol, and Farmington on topics such as public health, brain health, and drunk driving
- Organized volunteer opportunities in Hartford for pre-health undergraduate students involved in our Collegiate Health Service Corps program
- Recruited and interviewed prospective students for Central's Certified Nursing Assistant program
- Tracked and analyzed demographic data of students who participated in any of Central CT AHEC's programs

## Graduate Assistantship

**University Center for Excellence in Developmental Disabilities,** UConn Health, CT
Graduate Assistant in the Leadership Education in Neurodevelopmental and Related Disabilities Program, August 2024- May 2025

- Attended weekly seminars with graduate students of different disciplines and listen to guest speakers who are experts and leaders in various fields related to children and people with disabilities regarding their education, health care, and legal rights
- Conducted a research project in collaboration with fellow school counselor trainee and professor to examine current 504 eligibility processes among public high schools in CT
- Read, reflected, and discussed articles about various topics such as special education, early intervention, healthcare needs of children with disabilities, family life, and the inequalities people and children with disabilities experience

## Professional Experience

**Central CT Area Health Education Center,** Hartford, CT
Executive Assistant/Programs Manager, June 2023-Present

- Supervised two AmeriCorps members to ensure they met all program requirements and guided them in the planning and implementation of all youth programs
- Met with school contacts, nonprofit directors, higher educational professionals and community members to develop and expand programs
- Represented Central CT AHEC at monthly CT AHEC data meetings, AmeriCorps supervision meetings, and health fairs
- Compiled and submitted monthly data reports on six agency programs using Microsoft Excel
- Assisted executive director with special projects, program development and agency operation
- Maintained agency records such as current contracts, financial statements, and employee files

## Skills

- PowerSchool, SchooLinks, Naviance, CT-SEDS, Google Suite Products, Microsoft Office Products

## Presentations

- Presentation with fellow graduate assistants to educate state legislators about a bill that is proposed to eliminate subminimum wage for people with a disability

## Professional Memberships

- American School Counselor Association
- Connecticut School Counselor Association

**BRISTOL PUBLIC SCHOOLS**
**Bristol, Connecticut**

December 3, 2025

| | |
|---|---|
| X | **Decision Item** |
| | **Information Item** |

**AGENDA REPORTING FORM**

**TOPIC: A2 Resignation effective June 18, 2025**

BACKGROUND:

Mirmina, Shawn – BCHS – Future Teachers Club Co-Advisor

**COST:** ________ **FUNDING SOURCE:** ________

**RECOMMENDATIONS/COMMENTS:**

**ATTACHMENTS:**

**TOPIC PRESENTER:** Joseph Grabowski

**CONTACT NUMBER:** 860-584-7022

**ACTING SUPERINTENDENT:** Iris White

Iris White

| Bristol Board of Education, Bristol CT | |
|---|---|
| Presented at Board Meeting: | |
| Approved: | |
| Order Filed: | |
| Referred to: | |

**BRISTOL PUBLIC SCHOOLS**
**Bristol, Connecticut**

December 3, 2025

| | |
|---|---|
| X | **Decision Item** |
| | **Information Item** |

## AGENDA REPORTING FORM

**TOPIC: A2 Hire effective November 5, 2025**

BACKGROUND:

Silva, Alyson – BCHS – Future Teachers Club Advisor

**COST:** ____________ **FUNDING SOURCE:** ____________

**RECOMMENDATIONS/COMMENTS:**

**ATTACHMENTS:**

**TOPIC PRESENTER:** **Joseph Grabowski**

**CONTACT NUMBER:** 860-584-7022

**ACTING SUPERINTENDENT:** *Iris White*
Iris White

| Bristol Board of Education, Bristol CT | |
|---|---|
| Presented at Board Meeting: | |
| Approved: | |
| Order Filed: | |
| Referred to: | |

**BRISTOL PUBLIC SCHOOLS**
**Bristol, Connecticut**

December 3, 2025

| | |
|---|---|
| X | **Decision Item** |
| | **Information Item** |

## AGENDA REPORTING FORM

**TOPIC: A3 Resignation effective June 18, 2025**

BACKGROUND:

Currao, Merriah – EPH – Science Co-Leader

**COST:** ______________________ **FUNDING SOURCE:** ______________________

**RECOMMENDATIONS/COMMENTS:**

**ATTACHMENTS:**

**TOPIC PRESENTER:** Joseph Grabowski

**CONTACT NUMBER:** 860-584-7022

**ACTING SUPERINTENDENT:** Iris White
Iris White

| Bristol Board of Education, Bristol CT | |
|---|---|
| Presented at Board Meeting: | |
| Approved: | |
| Order Filed: | |
| Referred to: | |

**BRISTOL PUBLIC SCHOOLS**
**Bristol, Connecticut**

12/3/25
Meeting Date

☑ **Decision Item**
☐ **Information Item**

## AGENDA REPORTING FORM

**TOPIC:** Proposed BAIMS trip to London, England

**BACKGROUND:** BAIMS is looking to bring a small group of music students to Europe in April, 2028. This immersive and cultural experience directly connects to the work being done in the Music Classrooms

**COST:** $40,000 ($4,000 per student) **FUNDING SOURCE:** Payments offset with Fundraisers

**RECOMMENDATIONS/COMMENTS:** Asking for BOE approval for the BAIMS Music Department to travel to Europe in April, 2028.

**ATTACHMENTS:** BAIMS 2028 Europe Music Trip.pdf

**TOPIC PRESENTER:** Ken Bagley/ Theresa MacDonald

**CONTACT NUMBER:** X7077

**SUPERINTENDENT:**

| Bristol Board of Education, Bristol CT | |
|---|---|
| Presented at Board Meeting: | |
| Approved: | |
| Order Filed: | |
| Referred to: | |

**BRISTOL PUBLIC SCHOOLS**
**Bristol, Connecticut**

______________________
**(Meeting Date)**

☐ **Decision Item**
☐ **Information Item**

# AGENDA REPORTING FORM

**TOPIC: Fall Sports Presentation**

**BACKGROUND: The student-athlete leadership council president and vice president will be presenting the fall sports highlights. Presentation will be sent Wednesday morning.**

**COST:** $0 **FUNDING SOURCE:** ______________________

**RECOMMENDATIONS/COMMENTS:**

**ATTACHMENTS:**

**TOPIC PRESENTER:** Cera Galluzzo

**CONTACT NUMBER:** 8605847041

**ACTING SUPERINTENDENT:** *Ms. Iris White*
Iris White.

| Bristol Board of Education, Bristol CT | |
|---|---|
| Presented at Board Meeting: | |
| Approved: | |
| Order Filed: | |
| Referred to: | |

Bristol Public Schools
**BRISTOL BOARD OF EDUCATION**
P.O. Box 450 . 129 Church Street
BRISTOL, CT 06011- 0450
(860) 584-7000 . Fax (860) 584-7611

**Iris White**
Superintendent of Schools

**Mary Hawk**
Deputy Superintendent of Schools



# 2026 BOARD OF EDUCATION MEETING SCHEDULE

**Day and Time:** First Wednesday of every month at 7:00 p.m.
** (Except January, July, and September)*

**Place of Meeting:** Auditorium, Board of Education Administration Building,
129 Church Street, Bristol, Connecticut 06010 and/or Virtually

January 7, 2026

February 4, 2026

March 4, 2026

April 1, 2026

May 6, 2026

June 3, 2026

July 1, 2026

August 5, 2026

September 2, 2026

October 7, 2026

November 4, 2026

December 2, 2026

| Course Title | Content Area | Grade Level: | Credit (if applicable) |
|---|---|---|---|
| Personal Finance & Investment | CTE-Business | 10-12 | 0.5 |

**Course Description**

This course provides students with the essential knowledge and skills to manage their personal finances and make informed financial decisions. Through real-world applications, interactive projects, and hands-on activities, students will learn about behavioral economics, budgeting, banking, credit, paychecks and taxes, introductory investing, and retirement planning.

By the end of the course, students will develop responsible financial habits. This class empowers students with the confidence to make smart financial choices, setting them up for lifelong financial success! Students who want to continue their financial education should enroll in Advanced Personal Finance upon the successful completion of this course.

| Aligned Core Resources | Connection to the ***BPS Vision of the Graduate*** |
|---|---|
| Next Generation Personal Finance | Collaboration<br>Global Awareness<br>Social and Cross-Cultural Skills<br>Communication<br>Information Literacy<br>Financial Literacy<br>Content Mastery<br>Critical Thinking and Problem Solving |

| **Additional Course Information:**<br>***Knowledge/Skill Dependent courses/prerequisites*** | Link to ***Completed Equity Audit*** |
|---|---|
| This course is a Connecticut state requirement for graduation. | Equity Curriculum Review Audit (Personal Finance) |

**Standard Matrix**

| Standard | Unit 1 | Unit 2 | Unit 3 | Unit 4 | Unit 5 | Unit 6 | Unit 7 | Unit 8 |
|---|---|---|---|---|---|---|---|---|
| **National Standards for Personal Financial Education - Earning Income** | | | | | | | | |
| **12.1** Compensation for a job or career can be in the form of wages, salaries, commissions, tips, or bonuses, and may also include contributions to employee benefits, such as health insurance, retirement savings plans, and education reimbursement programs | | X | | | | | | |
| **12.4** Employers generally pay higher wages or salaries to more educated, skilled, and productive workers than to less educated, skilled, and productive workers | | X | | | | | | |
| **12.6** Federal, state, and local taxes fund government-provided goods, services, and transfer payments to individuals. The major types of taxes are income taxes, payroll taxes, property taxes, and sales taxes. | | | X | | | | | |
| **12.7** The type and amount of taxes people pay depend on their sources of income, amount of income, and amount and type of spending. | | | X | | | | | |
| **12.8** Interest, dividends, and capital appreciation (gains) are examples of unearned income derived from financial investments. Capital gains are subject to | | | X | | | | | |

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| different tax rates than earned income. | | | | | | | | |
| **12.9** Tax deductions and credits reduce income tax liability. | | | X | | | | | |
| **National Standards for Personal Financial Education - Spending** | | | | | | | | |
| **12.1** A budget helps people achieve their financial goals by allocating income to necessary and desired spending, saving, and philanthropy. | | | | X | | | | |
| **12.2** Consumer decisions are influenced by the price of products or services, the price of alternatives, the consumer's budget and preferences, and potential impact on the environment, society, and economy | | | | X | | | | |
| **12.6** Housing decisions depend on individual preferences, circumstances, and costs, and can impact personal satisfaction and financial well-being. | | | | X | | | | |
| **National Standards for Personal Financial Education - Saving** | | | | | | | | |
| **12.1** Financial institutions offer several types of savings accounts, including regular savings, money market accounts, and certificates of deposit (CDs), that differ in minimum deposits, rates, and deposit insurance coverage. | | | | | | X | X | |
| **12.2** Deposit account interest rates and fees vary between financial institutions and depend on market conditions and competition. | | | | | | | X | |
| **12.3** Unless offered by insured financial institutions, mobile payment accounts and cryptocurrency accounts are not federally insured and usually do not pay interest to depositors. | | | | | | | X | |
| **12.4** Inflation can erode the value of savings if the interest rate earned on a savings account is less than the inflation rate. | | | | | | | X | |
| **12.9** There are many strategies that can help people manage psychological, emotional, and external obstacles to saving, including automated savings plans, employer matches, and avoiding personal triggers. | X | | | | | | | |
| **National Standards for Personal Financial Education - Managing Credit** | | | | | | | | |
| **12.1** Borrowers can compare the cost of credit using the Annual Percentage Rate (APR) and other terms in the loan or credit card contract. | | | | | X | | | |
| **12.2** Loans that are secured by collateral have lower interest rates than unsecured loans because they are less risky to lenders. | | | | | X | | | |
| **12.7** Lenders assess creditworthiness of potential borrowers by consulting credit reports compiled by credit bureaus. | | | | | X | | | |
| **12.8** A credit score is a numeric rating that assesses a person's credit risk based on | | | | | x | | | |

| | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| information in their credit report | | | | | | | | |
| **12.12** Consumer credit protection laws govern disclosure of credit terms, discrimination in borrowing, and debt collection practices. | | | | | x | | | |
| **12.13** Alternative financial services, such as payday loans, check cashing services, pawnshops, and instant tax refunds, provide easy access to credit, often at relatively high cost. | | | | | x | | | |
| **National Standards for Personal Financial Education - Investing** | | | | | | | | |
| **12.1** A person's investment risk tolerance depends on factors such as personality, financial resources, investment experiences, and life circumstances. | | | | | | | | x |
| **12.2** Investors earn investment returns from price changes and annual cash flows (such as interest, dividends or rent). The nominal annual rate of return is the annual total dollar benefit as a percentage of the beginning price. | | | | | | | | x |
| **12.3** Investors expect to earn higher rates of return when they invest in riskier assets. | | | | | | | | x |
| **12.6** When making diversification and asset allocation decisions, investors consider their risk tolerance, goals, and investing time horizon. | | | | | | | | x |
| **12.8** Tax rules affect the rate of return on different investments, and can vary by holding period, type of income, and type of account. | | | | | | | | x |
| **12.13** Investors often compare the performance of their investments against a benchmark, such as a diversified stock or bond index. | | | | | | | | x |

**Unit Links**

Unit 1: Behavioral Economics
Unit 2: Careers
Unit 3: Earning & Reporting Income
Unit 4: Budgeting
Unit 5: Credit
Unit 6: Banking
Unit 7: Savings
Unit 8: Investing

| **Unit Title** | |
|---|---|
| Unit 1: Behavioral Economics | |
| **Relevant Standards: Bold indicates priority** | |
| **National Standards for Personal Financial Education**<br>**Saving - 12.9** There are many strategies that can help people manage psychological, emotional, and external obstacles to saving, including automated savings plans, employer matches, and avoiding personal triggers. | |
| **Essential Question(s)** | **Enduring Understanding(s)** |
| 1. Why is understanding personal finance essential for achieving personal and lifelong goals?<br>2. How do personal and societal values shape the financial choices people make? | 1. Financial literacy empowers individuals to make informed decisions, manage resources effectively, and build a foundation for financial stability and independence.<br>2. Financial decisions are influenced by individual beliefs, cultural norms, and social expectations, which together shape how people prioritize spending, saving, and investing. |
| **Demonstration of Learning** | **Pacing for Unit** |
| • Students will use their understanding of needs, wants, and values to determine their impact of spending habits<br>• Students will create SMART financial goals | 3 classes of instruction |
| **Family Overview (link below)** | **Integration of Technology** |
| Personal Finance Family Overview | N/A |
| **Unit-specific Vocabulary** | **Aligned Unit Materials, Resources, and Technology (beyond core resources)** |
| Loss Aversion<br>SMART Goals<br>Needs<br>Wants<br>Inner Values<br>Social Values<br>Physical Values<br>Financial Values<br>Cognitive Bias<br>FOMO | Next Gen Personal Finance Activities and Reading Materials |
| **Opportunities for Interdisciplinary Connections** | **Anticipated misconceptions** |
| • Psychology: How behavior and habits are formed.<br>• Sociology: Discuss how social norms shape financial priorities and consumerism.<br>• ELA: Reflective writing on personal money experiences and what students hope to learn. | • Personal finance only deals with money management (budgeting, saving) and not emotional, cultural, or psychological factors.<br>• Financial success depends solely on income level rather than habits and mindset.<br>• Financial choices are purely logical, ignoring emotional or ethical influences. |
| **Connections to Prior Units** | **Connections to Future Units** |
| n/a | • Unit 4: Creating financial goals impacts your personal budget.<br>• Unit 7 & 8: How you spend money impacts your ability to meet current financial obligations and your future wealth. |
| **Differentiation through *Universal Design for Learning***<br>**UDL Indicator and Teacher Actions** | |
| Engagement<br>• Use real-life scenarios and financial literacy games to motivate engagement. | |

- Offer choices in topics or projects to foster ownership.
- Connect finance concepts to students' personal goals and interests.

Representation

- Provide visual aids, infographics, and videos explaining financial terms and concepts.
- Use bilingual glossaries and simplified language for complex ideas.
- Incorporate multimedia materials to cater to different learning styles.

Action and Expression

- Allow students to demonstrate understanding through role-plays, posters, or digital presentations.
- Use graphic organizers to structure explanations of financial concepts.
- Provide opportunities for students to create personal budgets or financial plans digitally or on paper.

**Supporting Multilingual/English Learners**
**Related *CELP standards* and Learning Targets**

| CELP Level | LT1 | LT2 |
|---|---|---|
| **Emerging** | I can begin to understand basic vocabulary related to Personal Finance. | I can recognize that personal and collective values can influence financial choices. |
| **Expanding** | I can describe key topics discussed in Personal Finance class. | I can explain how personal and collective values impact financial decisions. |
| **Building** | I can analyze and discuss detailed topics in Personal Finance. | I can evaluate the influence of personal and collective values on financial decisions. |

| Lesson Sequence | Learning Target | Success Criteria | Assessment |
|---|---|---|---|
| 1 | **Learning Target 1**<br>I can learn about the topics in Personal Finance class | • I can identify the topics that will be covered in Personal Finance class. | Budgeting & Personal values based financial game (ex: The Bean Game). |
| 2 - 3 | **Learning Target 2**<br>I can evaluate how personal and collective values influence financial decisions | • I can differentiate between a need vs. want.<br>• I can explain how external influences (e.g. peers, family, or social media) can impact personal savings decisions<br>• I can evaluate how cognitive biases influence financial decisions | |

| Unit Title | |
|---|---|
| Unit 2: Careers | |
| **Relevant Standards: Bold indicates priority** | |
| **National Standards for Personal Financial Education**<br>**Earning Income - 12.1** Compensation for a job or career can be in the form of wages, salaries, commissions, tips, or bonuses, and may also include contributions to employee benefits, such as health insurance, retirement savings plans, and education reimbursement programs<br>**Earning Income - 12.4** Employers generally pay higher wages or salaries to more educated, skilled, and productive workers than to less educated, skilled, and productive workers | |
| **Essential Question(s)** | **Enduring Understanding(s)** |
| 1. What types of skills are necessary for career success, and how do they influence employability?<br>2. How do education and experience impact the wages and salaries people earn?<br>3. Why do employers offer benefit packages, and how do these benefits influence employee recruitment and retention? | 1. Successful careers require a combination of technical, academic, and soft skills that enable individuals to perform job tasks effectively and adapt to a changing workforce.<br>2. Higher levels of education and greater work experience often lead to increased earning potential because they enhance an individual's value and qualifications in the job market.<br>3. Employers use benefit packages which may include health insurance, retirement plans, and paid time off to attract, motivate, and retain qualified employees while supporting their overall well-being. |
| **Demonstration of Learning** | **Pacing for Unit** |
| • Students will identify soft skills, hard skills, and transferable skills and how they relate to their future career paths<br>• Students will recognize how different careers may share similar skill sets<br>• Students will research and assess a future career. | 3 classes of instruction/performance-based task |
| **Family Overview (link below)** | **Integration of Technology** |
| [Personal Finance Family Overview] | [CareerOneStop.org] - students research various careers |
| **Unit-specific Vocabulary** | **Aligned Unit Materials, Resources, and Technology (beyond core resources)** |
| Benefits<br>Hard Skills<br>Networking<br>Salary<br>Self-Employed<br>Soft Skills<br>Transferable Skills | Careeronestop Career Exploration<br>Next Gen Personal Finance Activities<br>MyNextMove.org<br>Bureau of Statistics: Occupational Outlook Handbook |
| **Opportunities for Interdisciplinary Connections** | **Anticipated misconceptions** |
| • Economics / Math: Connect to supply/demand, opportunity cost and return on investment.<br>• ELA: Analyze job postings<br>• Psychology: motivation, personal values and identity formation in career choices linking personality assessments and goal-setting to individual pathways. | • Education guarantees a high-paying job<br>• Soft skills do not matter as much as technical skills.<br>• Finding a dream job is a one-time event.<br>• Benefits are just extra perks, not part of total pay<br>• Networking only happens for certain professions<br>• Once I choose a career path, I am locked in |

| Connections to Prior Units | Connections to Future Units |
|---|---|
| • Your occupation influences your income and therefore, your spending choices. | • Unit 4: Your career choice directly impacts your budget. |

**Differentiation through *Universal Design for Learning***
**UDL Indicator and Teacher Actions**

Engagement
- Incorporate guest speakers or virtual interviews with local professionals.
- Use interactive simulations of job applications and interviews.
- Connect career planning activities to students' personal aspirations.

Representation
- Use visual resumes, career charts, and job description videos.
- Offer bilingual resources and visuals illustrating different careers and skills.
- Incorporate digital tools for exploring career pathways.

Action and Expression
- Enable students to create digital portfolios or presentations about potential careers.
- Use role-playing scenarios to practice interview skills.
- Allow students to write reflective essays or create videos explaining their career goals.

**Supporting Multilingual/English Learners**
**Related *CELP standards* and Learning Targets**

| CELP Level | LT1 | LT2 | LT3 |
|---|---|---|---|
| **Emerging** | I can begin to identify different types of skills needed for a career. | I can recognize that wages and salaries relate to education and experience. | I can start to understand what benefit packages are. |
| **Expanding** | I can describe the different types of skills needed for a career. | I can explain how wages and salaries are connected to education and experience. | I can explain what benefit packages include and how they are used to attract employees. |
| **Building** | I can analyze and explain the different types of skills needed for a career. | I can evaluate how wages and salaries are related to education and experience. | I can analyze how benefit packages are used in recruitment and what they typically include. |

| Lesson Sequence | Learning Target | Success Criteria | Assessment |
|---|---|---|---|
| 1 | **Learning Target 1**<br>I can explain the different types of skills needed for a career<br><br>**Learning Target 2**<br>I can explain how wages and salaries are connected to education and experience. | • I can Identify different types of jobs and careers where wages and salaries depend on a worker's productivity and skills<br>• I can explain the differences between hard and soft skills.<br>• I can evaluate the costs and benefits of investing in additional education or training. | • Students will compare sample job postings<br>• Students will research specific careers |
| 2 - 3 | **Learning Target 3**<br>I can explain benefit packages and how they are used to recruit new employees | • I can read a job posting.<br>• I can explain different strategies for acquiring a job, (job boards, websites, networking).<br>• I can explain the requirements necessary for me to get my dream job. | |

| Unit Title | |
|---|---|
| Unit 3: Earning & Reporting Income | |
| **Relevant Standards: Bold indicates priority** | |
| **National Standards for Personal Financial Education**<br>**Earning Income 12.6** Federal, state, and local taxes fund government-provided goods, services, and transfer payments to individuals. The major types of taxes are income taxes, payroll taxes, property taxes, and sales taxes.<br>**Earning Income 12.7** The type and amount of taxes people pay depend on their sources of income, amount of income, and amount and type of spending.<br>**Earning Income 12.8** Interest, dividends, and capital appreciation (gains) are examples of unearned income derived from financial investments. Capital gains are subject to different tax rates than earned income.<br>**Earning Income 12.9** Tax deductions and credits reduce income tax liability. | |
| **Essential Question(s)** | **Enduring Understanding(s)** |
| 1. How does understanding my paycheck and taxes help me see where my money goes and how it supports society?<br>2. Why is it important to understand employment paperwork and the steps in the tax cycle?<br>3. What do teens need to know about earning income and paying taxes responsibly?<br>4. How does learning to file taxes build financial independence and responsibility?<br>5. How does understanding taxes prepare me for real-world financial success? | 1. Knowing how net pay is calculated and where tax dollars are spent helps individuals make informed financial decisions and recognize their role in supporting public services and infrastructure.<br>2. Understanding job forms and the tax cycle ensures accurate reporting, compliance with tax laws, and smoother financial management throughout the year.<br>3. Teens who learn how to manage taxes early develop responsible money habits and gain confidence in handling real-world financial responsibilities.<br>4. Filing taxes correctly helps individuals meet legal obligations, understand their income, and take advantage of potential tax benefits or refunds.<br>5. Mastery of tax concepts equips individuals with the knowledge and skills to manage income effectively, make informed financial decisions, and contribute responsibly to society. |
| **Demonstration of Learning** | **Pacing for Unit** |
| • Students will Identify all tax forms<br>• Students will explain who qualifies as a dependant<br>• Students can describe who is responsible for paying taxes<br>• Students will analyze a paystub<br>• Students will define gross and net pay and describe voluntary and mandatory payroll deductions.<br>• Students will explain how different types of taxes fund different types of government programs | • 5 classes of instruction<br>• 1 class for assessment/performance-based task |
| **Family Overview (link below)** | **Integration of Technology** |
| Personal Finance Family Overview | IRS.gov website |
| **Unit-specific Vocabulary** | **Aligned Unit Materials, Resources, and Technology (beyond core resources)** |
| 1040<br>1099<br>401(k)<br>Deduction<br>Dependent | IRS Forms<br>Next Gen Personal Finance |

| | |
|---|---|
| Discretionary government spending<br>Earned income<br>Employer contributions<br>FICA<br>Gross pay<br>Household employee<br>I-9<br>Income taxes<br>Mandatory government spending<br>Medicare<br>Net pay<br>Pre-tax deductions<br>Refund<br>Self-employed<br>Social Security<br>Unearned income<br>W-2<br>W-4<br>Withholding | |
| **Opportunities for Interdisciplinary Connections** | **Anticipated misconceptions** |
| • Math: Paycheck calculations, tax rates, government budgets<br>• Civics/Government: taxation, federal / state spending<br>• Economics: Fiscal policy<br>• Technology: online tax filing platforms<br>• ELA: real-world tax forms and job paperwork as informational texts | • Gross pay is what I take home.<br>• Taxes are just money taken away by the government.<br>• All government spending is the same.<br>• Teens do not need to worry about taxes.<br>• Everyone gets a tax refund.<br>• Filing taxes is too complicated.<br>• All income is taxed the same way. |
| **Connections to Prior Units** | **Connections to Future Units** |
| • Unit 2: Your occupation affects your income reported for tax purposes.<br>• Unit 2: Knowing how to complete required employment forms connects to the Careers unit. | Unit 4: Filing taxes connects to the Budget unit given a refund or a dollar amount owed. |

**Differentiation through *Universal Design for Learning***
**UDL Indicator and Teacher Actions**

Engagement
- Use relatable scenarios about earning, paying, and saving taxes.
- Incorporate tax-related games or online simulations.
- Connect tax responsibilities to students' future financial planning.

Representation
- Use visuals, flow charts, and videos explaining tax cycles and forms.
- Provide bilingual guides and simplified explanations of tax processes.
- Include real samples of tax forms for hands-on practice.

Action and Expression
- Assign projects to complete mock tax filings digitally or on paper.
- Use role-playing to simulate tax office visits.
- Enable students to create digital stories or posters explaining taxes.

**Supporting Multilingual/English Learners**
**Related *CELP standards* and Learning Targets**

| CELP Level | LT1 | LT2 | LT3 | LT4 |
|---|---|---|---|---|

| | | | | |
|---|---|---|---|---|
| **Emerging** | I can begin to understand how my net pay is calculated. | I can recognize some job paperwork. | I can start to understand that teens pay taxes. | I can identify basic steps in filing taxes. |
| **Expanding** | I can explain how my net pay is calculated. | I can identify different parts of the tax cycle and job paperwork. | I can explain how teens navigate taxes. | I can describe the process of filing taxes. |
| **Building** | I can analyze and explain how my net pay is calculated and where tax dollars are spent. | I can explain the entire tax cycle and relevant job paperwork. | I can evaluate how teens navigate taxes and understand their responsibilities. | I can demonstrate how to properly file taxes and understand the importance of it. |

| **Lesson Sequence** | **Learning Target** | **Success Criteria** | **Assessment** |
|---|---|---|---|
| 1 | **Learning Target 1**<br>I can explain how my net pay is calculated and identify where government spends my tax dollars. | • I can read and understand a pay stub<br>• I can compare mandatory and discretionary government spending<br>• I can explain the difference between gross and net pay<br>• I can analyze the different categories of discretionary government spending | • Students will compare and analyze tax forms<br>• Students will examine dependent and standard deduction<br>• Students will analyze pay stub and payroll deductions |
| 2 | **Learning Target 2**<br>I can identify job paperwork and the tax cycle. | • I can identify important dates within the tax cycle<br>• I can compare tax forms and their purpose. | |
| 3 | **Learning Target 3**<br>I can explain how teens navigate taxes. | • I can explain who qualifies to be claimed as a dependent for tax purposes.<br>• I can determine who is required to file income taxes. | |
| 4 | **Learning Target 4**<br>I can demonstrate understanding of filing taxes. | • I can analyze a W-2 form.<br>• I can explain the difference between earned and unearned income.<br>• I can explain how to file my taxes. | |
| 5 | **Learning Target 5**<br>I can demonstrate mastery of the taxes unit. | • I can explain the purpose of income taxes, tax documents, and the forms necessary to complete a tax return. | |

<table>
<tr><th colspan="2">Unit Title</th></tr>
<tr><td colspan="2">Unit 4: Budgeting</td></tr>
<tr><th colspan="2">Relevant Standards: Bold indicates priority</th></tr>
<tr><td colspan="2">National Standards for Personal Financial Education<br>Spending - 12.1 A budget helps people achieve their financial goals by allocating income to necessary and desired spending, saving, and philanthropy.<br>Spending - 12.2 Consumer decisions are influenced by the price of products or services, the price of alternatives, the consumer's budget and preferences, and potential impact on the environment, society, and economy<br>Spending - 12.6 Housing decisions depend on individual preferences, circumstances, and costs, and can impact.</td></tr>
<tr><th>Essential Question(s)</th><th>Enduring Understanding(s)</th></tr>
<tr><td>1. How does creating and following a budget support effective financial planning?<br>2. How can balancing needs, wants, and savings in a budget help people reach their financial goals?<br>3. How do personal values and lifestyle choices influence housing decisions?<br>4. How do changing prices and spending habits affect a person's budget and financial stability?</td><td>1. A budget serves as a financial roadmap that helps individuals manage income and expenses, make intentional choices, and work toward financial stability and goals.<br>2. Allocating income thoughtfully among expenses, discretionary spending, and savings enables individuals to meet immediate needs while planning for future financial success.<br>3. Housing choices reflect an individual's personal preferences, financial priorities, and lifestyle needs, balancing affordability with comfort and convenience.<br>4. Understanding how prices influence spending decisions helps individuals adjust their budgets, maintain financial balance, and make informed purchasing choices.</td></tr>
<tr><th>Demonstration of Learning</th><th>Pacing for Unit</th></tr>
<tr><td>• Students will describe the difference in variable and fixed expenses.<br>• Students will describe the process of creating a budget based on available income and expenses.<br>• Students will analyze common budgeting strategies including pay yourself first, envelope system, zero based budgeting and 50/30/20 rule.<br>• Students will practice budgeting strategies</td><td>• 4 classes of instruction<br>• 1 class for assessment/performance-based task</td></tr>
<tr><th>Family Overview (link below)</th><th>Integration of Technology</th></tr>
<tr><td>Personal Finance Family Overview</td><td>• Students complete internet research of free budgeting templates which they can use.<br>• Fidelity simulation: 5 Money Musts<br>• Next Gen Personal Finance simulation: Living Paycheck to Paycheck (Spent)</td></tr>
<tr><th>Unit-specific Vocabulary</th><th>Aligned Unit Materials, Resources, and Technology (beyond core resources)</th></tr>
<tr><td>50/30/20 Budget<br>Budget<br>Cash Envelope Budget<br>Cost of Living<br>Deficit<br>Discretionary Expenses<br>Expenses<br>Emergency Fund</td><td>• Next Gen Personal Finance<br>• Budget simulations</td></tr>
</table>

| | |
|---|---|
| Fixed Expense<br>Net Pay<br>Pay Yourself First<br>Periodic Expenses<br>Salary<br>Student Loan<br>Surplus<br>Unit Price<br>Utilities<br>Variable Expense<br>Zero-Based Budget | |
| **Opportunities for Interdisciplinary Connections** | **Anticipated misconceptions** |
| • Math: connect percentages by analyzing income allocations and spending categories.<br>• Economics: explore how inflation and consumer behavior affect buying choices and purchasing power.<br>• Family Consumer Science: Link lifestyle and wellness. How financial stress, food choices, housing decisions influence personal well-being.<br>• Technology: Integrate budgeting apps, spreadsheets | • Budgets are restrictive and only for people with financial problems.<br>• I do not need a budget because I do not earn enough money.<br>• Savings happens after spending.<br>• Wants and needs are always clear-cut.<br>• Prices are fixed and can't be influenced by consumer choices.<br>• Once I make a budget, I do not need to adjust it. |
| **Connections to Prior Units** | **Connections to Future Units** |
| Your budget connects to the Behavioral Finance unit (needs, wants, life-enhancing wants). | • Unit 6, 7, &8: "Paying Yourself First" can involve direct deposit, savings, and investing.<br>• Unit 5: Successfully managing a budget by paying obligations on time improves your credit score. |

**Differentiation through *Universal Design for Learning***
**UDL Indicator and Teacher Actions**

Engagement
- Use personal goal-setting exercises linked to budgeting activities.
- Include interactive budgeting apps or simulations.
- Foster collaboration through group budgeting projects.

Representation
- Present sample budgets via visual diagrams and videos.
- Use bilingual tools to explain budgeting terminology.
- Incorporate visual planning tools like charts and graphs.

Action and Expression
- Have students create their own digital or paper budgets.
- Use role-playing to practice adjusting budgets based on changing circumstances.
- Encourage multimedia presentations of financial goals and budgeting strategies.

**Supporting Multilingual/English Learners**
**Related *CELP standards* and Learning Targets**

| CELP Level | LT1 | LT2 | LT3 | LT4 |
|---|---|---|---|---|
| **Emerging** | I can begin to understand the basic idea of a budget. | I can recognize that budgets help with financial goals. | I can start to see that preferences affect housing choices. | I can notice that prices of products affect budgets. |

| | | | | |
|---|---|---|---|---|
| **Expanding** | I can explain the purpose of a budget in personal finance. | I can describe how a budget helps achieve financial goals through spending and saving. | I can evaluate how personal preferences influence housing decisions. | I can explain how the prices of products impact a budget. |
| **Building** | I can analyze and explain the role of a budget in personal financial planning. | I can evaluate how budgets aid in reaching financial goals by managing expenses and savings. | I can evaluate how personal preferences influence housing decisions and choices. | I can assess how the prices of products affect budgeting and financial planning. |

| **Lesson Sequence** | **Learning Target** | **Success Criteria** | **Assessment** |
|---|---|---|---|
| 1 | **Learning Target 1**<br>I can explain the role of a budget in personal financial planning | • I can describe the purpose of a budget<br>• I can classify expenses as needs and wants | Students will complete the budgeting process. |
| 2 | **Learning Target 2**<br>I can understand how a budget helps individuals achieve their financial goals by allocating income to necessary expenses, desired spending, and saving, | • I can identify short-term and long-term financial goals.<br>• I can develop a budget to allocate current income to necessary and desired spending, including fixed and variable expenses<br>• I can explain strategies to create and maintain a budget. | |
| 3 | **Learning Target 3**<br>I can evaluate how housing decisions are influenced by personal preferences. | • I can identify financial and personal reasons that younger adults often choose to rent a home instead of buying.<br>• I can compare the costs and benefits of renting versus buying a home. | |
| 4 | **Learning Target 4**<br>I can evaluate how the price of products impact a budget | • I can describe the various factors that may influence a consumer's purchase decision<br>• I can apply a process for making an informed consumer decision | |

| Unit Title |
|---|
| Unit 5: Credit |
| **Relevant Standards: Bold indicates priority** |
| **National Standards for Personal Financial Education**<br>**Managing Credit 12.1** Borrowers can compare the cost of credit using the Annual Percentage Rate (APR) and other terms in the loan or credit card contract.<br>**Managing Credit 12.2** Loans that are secured by collateral have lower interest rates than unsecured loans because they are less risky to lenders.<br>**Managing Credit 12.7** Lenders assess creditworthiness of potential borrowers by consulting credit reports compiled by credit bureaus.<br>**Managing Credit 12.8** A credit score is a numeric rating that assesses a person's credit risk based on information in their credit report<br>**Managing Credit 12.12** Consumer credit protection laws govern disclosure of credit terms, discrimination in borrowing, and debt collection practices.<br>**Managing Credit 12.13** Alternative financial services, such as payday loans, check cashing services, pawnshops, and instant tax refunds, provide easy access to credit, often at relatively high cost. |

| Essential Question(s) | Enduring Understanding(s) |
|---|---|
| 1. How does using credit responsibly impact a person's financial future?<br>2. How can using a credit card wisely help build and maintain good credit?<br>3. What factors should be considered before taking out an installment loan?<br>4. How can individuals protect themselves from identity theft and financial fraud? | 1. Responsible use of credit allows individuals to build trust with lenders, access financial opportunities, and maintain long-term financial stability.<br>2. Understanding how credit cards function and making on-time, low-balance payments strengthens credit history and promotes responsible financial behavior.<br>3. Evaluating loan terms, interest rates, and repayment responsibilities helps borrowers make informed decisions and avoid unnecessary debt.<br>4. Recognizing how identity theft occurs and practicing safe financial habits reduces the risk of fraud and financial loss. |
| **Demonstration of Learning** | **Pacing for Unit** |
| • Students will describe the basics of credit<br>• Students will evaluate the cost of credit (interest)<br>• Students will identify various forms of credit and the advantages and disadvantages of using them<br>• Students will describe the difference and importance of a credit score and a credit report<br>• Students will read a Schumer box<br>• Students will be able to assess creditworthiness<br>• Students will understand strategies to defend and deflect identity theft | • 6 classes of instruction<br>• 1 class for assessment / performance-based task |
| **Family Overview (link below)** | **Integration of Technology** |
| Personal Finance Family Overview | Online loan calculator (examples: bankrate.com and moneychimp.com ) |
| **Unit-specific Vocabulary** | **Aligned Unit Materials, Resources, and Technology (beyond core resources)** |
| Annual Percentage Rate (APR)<br>Cash Advance<br>Credit<br>Credit Bureau | • Next Gen Personal Finance<br>• Online loan calculator |

| | |
|---|---|
| Credit Report<br>Credit Score<br>Debt<br>FICO Score<br>Interest Rate<br>Annual Percentage Rate (APR)<br>Authorized User<br>Collateral<br>Cosigner<br>Credit Card<br>Credit Card Agreement/Disclosure<br>Credit Limit<br>Down Payment<br>Fees<br>Fixed/Variable-Rate Loan<br>Identity Theft<br>Installment Loan<br>Interest<br>Interest Rate<br>Loan<br>Minimum Payment<br>Principal<br>Personal Loan<br>Revolving Credit<br>Schumer Box<br>Secured/Unsecured Debt<br>Term | |
| **Opportunities for Interdisciplinary Connections** | **Anticipated misconceptions** |
| • Math: Explore interest calculations, loan amortization, credit card repayment<br>• Civics: Lending laws and government regulations<br>• Technology: Online privacy, phishing awareness<br>• Psychology: impulse control, delayed gratification, emotional spending<br>• ELA: critical reading skills by comparing credit card offers and reading loan agreements | • All debt is bad<br>• The lowest monthly payment is always the best option.<br>• Carrying a credit card balance helps build credit.<br>• APR does not matter if I make the minimum payment<br>• Identity theft only happens to adults<br>• Credit reports and scores are the same thing |
| **Connections to Prior Units** | **Connections to Future Units** |
| • Unit 4: How you manage credit impacts your budget.<br>• Unit 4: Your credit score is impacted by payment history. | • Unit 6: Paying bills on-line.<br>• Unit 6 & 8: Managing your credit will effect your banking and investing habits. |

| **Differentiation through *Universal Design for Learning***<br>**UDL Indicator and Teacher Actions** |
|---|
| Engagement<br>• Use real-life scenarios, such as applying for a credit card or loan, to motivate participation.<br>• Incorporate interactive simulations or games where students practice making responsible credit decisions.<br>• Offer choices in projects, such as creating a video, infographic, or presentation, to foster ownership and interest.<br>Representation |

- Present credit concepts through videos, diagrams, and visual aids explaining credit, credit cards, loans, and identity theft.
- Use bilingual glossaries and simplified language to make complex topics accessible.
- Incorporate stories and case studies illustrating responsible use of credit and the risks of identity theft.

Action and Expression

- Allow students to demonstrate understanding by creating digital or physical posters, videos, or presentations about responsible credit use.
- Enable practice through role-playing activities, such as applying for credit, reviewing loan terms, or identifying identity theft scenarios.
- Provide tools for students to develop personal plans for responsible credit management and strategies for protecting personal information.

**Supporting Multilingual/English Learners**
**Related *CELP standards* and Learning Targets**

| CELP Level | LT1 | LT2 | LT3 | LT4 |
|---|---|---|---|---|
| **Emerging** | I can begin to understand what credit means. | I can recognize what credit cards are. | I can notice some features of installment loans. | I can start to understand what identity theft is. |
| **Expanding** | I can explain what credit is and why it is important. | I can explain how credit cards work and some ways to use them responsibly. | I can describe the features, costs, and responsibilities of installment loans. | I can identify ways identity theft can happen. |
| **Building** | I can analyze and explain what credit is and how to use it responsibly | I can evaluate how to use credit cards responsibly to build good credit. | I can analyze the features, costs, and responsibilities of installment loans to make informed decisions. | I can evaluate strategies to protect personal and financial information from identity theft. |

| Lesson Sequence | Learning Target | Success Criteria | Assessment |
|---|---|---|---|
| 1 | **Learning Target 1**<br>I can describe what credit is and how to utilize it responsibly. | • I can define credit<br>• I can evaluate the pros and cons of using credit.<br>• I can explain the different types of credit.<br>• I can compare the cost of credit by analyzing the Annual Percentage Rate (APR) and other loan or credit card terms. | Students will analyze different borrowing options and explain how responsible use of credit supports good financial decision-making. |
| 2 | **Learning Target 2**<br>I can explain how credit cards work and how to use them responsibly to build and maintain good credit. | • I can define key terms related to credit cards.<br>• I can evaluate the pros and cons of using credit cards..<br>• I can compare different credit card offers and compare the most cost-effective options based on fees, APR and rewards.<br>• I can explain the consequences of missing payments or paying only the minimum balance | |

| | | | |
|---|---|---|---|
| | | • I can describe responsible strategies for using a credit card, such as paying the balance in full, monitoring spending and avoiding unnecessary debt. | |
| 3 | **Learning Target 3**<br>I can analyze the features, costs and responsibilities of using installment loans to make informed borrowing decisions. | • I can define an installment loan.<br>• I can explain the different types of installment credit.<br>• I can explain how secured debt works.<br>• I can explain the impact of various fees on finances. | |
| 4 | **Learning Target 4**<br>I can identify how identity theft happens and apply strategies to protect my personal and financial information. | • I can define identity theft and explain how it can impact a person's financial life<br>• I can identify common methods criminals use to steal personal information ( phishing, skimming, data breaches, social engineering)<br>• I can list specific steps to prevent identity theft.<br>• I can explain what to do if identity theft occurs. | Students will analyze situations involving financial risk and explain ways to protect personal and financial information. |

| | |
|---|---|
| **Unit Title** | |
| Unit 6: Banking | |
| **Relevant Standards: Bold indicates priority** | |
| **National Standards for Personal Financial Education - Saving**<br>**Saving 12.1** Financial institutions offer several types of savings accounts, including regular savings, money market accounts, and certificates of deposit (CDs), that differ in minimum deposits, rates, and deposit insurance coverage. | |
| **Essential Question(s)** | **Enduring Understanding(s)** |
| 1. How does using a checking account help individuals manage their personal finances effectively?<br>2. Why is it important to manage and monitor a checking account regularly? | 1. A checking account provides a safe and convenient way to manage money, make payments, and track financial activity for everyday expenses.<br>2. Maintaining a checking account through accurate recordkeeping, balancing, and monitoring prevents overdrafts, supports budgeting, and promotes financial responsibility. |
| **Demonstration of Learning** | **Pacing for Unit** |
| • Students will demonstrate how to use a checking account to maintain finances, including writing checks, deposits, endorsements, and balancing a check book<br>• Students can compare and contrast FDIC/NCUA insurance | • 5 classes of instruction<br>• 1 class for assessment/performance-based task |
| **Family Overview (link below)** | **Integration of Technology** |
| [Personal Finance Family Overview]() | On-line banking resources where applicable |
| **Unit-specific Vocabulary** | **Aligned Unit Materials, Resources, and Technology (beyond core resources)** |
| ATM<br>Account Number<br>Average Minimum Daily Balance<br>Balance<br>Bank Statement<br>Check<br>Check Register<br>Debit Card<br>Delayed Deduction<br>Deposit<br>Direct Deposit<br>Endorsements<br>FDIC and NCUA Insurance<br>Maintenance Fee<br>Mobile Deposit<br>Online Bill Pay<br>Outstanding Checks/Deposits<br>Overdraft<br>Routing Number | • Checkbook simulations (writing checks, deposit slips, endorsements, and reconciling)<br>• Next Gen Personal Finance |
| **Opportunities for Interdisciplinary Connections** | **Anticipated misconceptions** |
| • Math: Reinforce addition, subtraction and decimals through checkbook register and account reconciliation<br>• Technology: Online banking security<br>• Civics: The role of government regulation in | • Bank accounts are only for adults with full time jobs<br>• The money in my bank account is always the same as my account balance<br>• Writing checks and balancing a checkbook are outdated skills<br>• The bank will automatically catch my mistakes |

| | |
|---|---|
| protecting depositors through FDIC / NCUA<br>• ELA: Financial document literacy, interpreting bank statements, transactions summaries and account disclosures. | • FDIC insurance covers all money, no matter the amount.<br>• Online and mobile banking are completing risk-free<br>• Reconciling a bank statement is not necessary if I use online banking. |
| **Connections to Prior Units** | **Connections to Future Units** |
| Unit 3 & 5: The banking unit connects to the Reporting Income unit and Credit unit. | Unit 7 & 8: The banking unit connects to the Savings and Investing units. |

**Differentiation through *Universal Design for Learning***

**UDL Indicator and Teacher Actions**

Engagement
- Use real-world bank account simulations and service comparisons.
- Offer choices of bank services to research and present.
- Connect banking concepts to students' financial goals.

Representation
- Present information through diagrams, videos, and interactive tutorials.
- Use bilingual resources explaining banking terminology.
- Incorporate visuals of bank statements, apps, and online platforms.

Action and Expression
- Encourage students to set up mock bank accounts digitally or on paper.
- Use role-playing to practice banking transactions.
- Allow students to create brochures or digital presentations explaining banking services.

**Supporting Multilingual/English Learners**

**Related *CELP standards:*** | **Learning Targets**

| CELP Level | LT1 | LT2 |
|---|---|---|
| **Emerging** | I can begin to understand what a checking account is. | I can recognize basic tasks involved in maintaining a checking account. |
| **Expanding** | I can explain how to use a checking account to manage personal finances. | I can demonstrate how to maintain a checking account responsibly. |
| **Building** | I can analyze and explain the benefits of using a checking account for personal finances. | I can demonstrate responsible checking account management to ensure financial responsibility. |

| Lesson Sequence | Learning Target | Success Criteria | Assessment |
|---|---|---|---|
| 1 | **Learning Target 1**<br>I can use a checking account to maintain personal finances | • I can explain different ways to deposit and withdraw funds from a checking account<br>• I can explain the purpose of FDIC/NCUA insurance<br>• I can interpret information provided on a bank statement. | Students will simulate managing a checking account by recording deposits, writing checks, and reconciling a bank statement to maintain an accurate balance. |
| 2 -5 | **Learning Target 2**<br>I can demonstrate how to maintain a checking account to ensure financial responsibility | • I can explain the various ways to deposit funds into an account, including check endorsements if applicable.<br>• I can explain how to write a check<br>• I can write a check to pay a bill<br>• I can record transactions in the checkbook register.<br>• I can calculate the balance on a | |

| | | | |
|---|---|---|---|
| | | checkbook register.<br>• I can reconcile the bank statement | |

<table>
<tr><td colspan="2">Unit Title</td></tr>
<tr><td colspan="2">Unit 7: Savings</td></tr>
<tr><td colspan="2">Relevant Standards:  Bold indicates priority</td></tr>
<tr><td colspan="2">National Standards for Personal Financial Education<br>Saving - 12.1 Financial institutions offer several types of savings accounts, including regular savings, money market accounts, and certificates of deposit (CDs), that differ in minimum deposits, rates, and deposit insurance coverage.<br>Saving - 12.2 Deposit account interest rates and fees vary between financial institutions and depend on market conditions and competition.<br>Saving - 12.3 Unless offered by insured financial institutions, mobile payment accounts and cryptocurrency accounts are not federally insured and usually do not pay interest to depositors.<br>Saving - 12.4 Inflation can erode the value of savings if the interest rate earned on a savings account is less than the inflation rate.</td></tr>
<tr><td>Essential Question(s)</td><td>Enduring Understanding(s)</td></tr>
<tr><td>1. How do different types of savings accounts help individuals meet their financial goals?<br>2. How can comparing financial institutions help you choose the best place to save your money?<br>3. How do modern financial tools like mobile payment accounts influence saving habits and long-term financial growth?<br>4. How does inflation influence the real value of money saved over time?</td><td>1. Various savings accounts offer different benefits and purposes, allowing individuals to choose the best option for their financial needs.<br>2. Evaluating interest rates, fees, accessibility, and services enables individuals to make informed choices that maximize savings growth and minimize unnecessary costs.<br>3. Comparing traditional and digital financial accounts helps individuals understand how convenience, accessibility, and interest potential affect their ability to save consistently over time.<br>4. Inflation decreases purchasing power, so understanding its relationship with interest rates helps individuals make saving choices that preserve and grow the value of their money.</td></tr>
<tr><td>Demonstration of Learning</td><td>Pacing for Unit</td></tr>
<tr><td>• Students will calculate simple and compound interest<br>• Students will compare features of different types of savings accounts<br>• Students will describe what affects a person's long term savings growth (mobile payment and inflation)</td><td>• 2 classes of instruction<br>• 1 class for assessment/performance-based project</td></tr>
<tr><td>Family Overview (link below)</td><td>Integration of Technology</td></tr>
<tr><td>Personal Finance Family Overview</td><td>Next Gen Banking Simulation</td></tr>
<tr><td>Unit-specific Vocabulary</td><td>Aligned Unit Materials, Resources, and Technology (beyond core resources)</td></tr>
<tr><td>ATM<br>Balance<br>Bank Statement<br>Certificate of Deposit (CD)<br>Commercial Bank<br>Compound Interest<br>Credit card<br>Credit Union<br>Deposit<br>Direct Deposit<br>Emergency Fund</td><td>• Next Gen Personal Finance - Research interest rates and compare banks<br>• Next Gen Bank Simulation</td></tr>
</table>

| | |
|---|---|
| FDIC and NCUA Insurance<br>High Yield Savings Account<br>Interest (APY/APR)<br>Low Balance Alert<br>Maintenance Fee<br>Minimum Balance<br>Money Market Account<br>Mobile Deposit<br>Savings and Loan Bank | |
| **Opportunities for Interdisciplinary Connections** | **Anticipated misconceptions** |
| • Math: Use simple and compound interest formulas.<br>• Economics: Connect inflation, purchasing power,monetary policy.<br>• Technology: Compare mobile payment platforms and digital banks. | • All savings accounts are basically the same.<br>• Savings accounts are the only method of investing.<br>• The bank pays interest on all accounts<br>• Money in a savings account will always grow in value.<br>• Compound interest only matters for large amounts of money.<br>• Interest rates always stay the same. |
| **Connections to Prior Units** | **Connections to Future Units** |
| Unit 4: Savings connects to the Budgeting Unit. | • Unit 8: Savings connects to investment.<br>• A deep dive of investing is taken in the second course, Advanced Personal Finance. |

**Differentiation through *Universal Design for Learning***

**UDL Indicator and Teacher Actions**

Engagement
- Use real-life stories of saving and investing successes.
- Incorporate interactive online investing simulations.
- Connect investment concepts to students' long-term goals.

Representation
- Provide visuals and videos explaining different savings and investment vehicles.
- Use bilingual glossaries of investment terminology.
- Offer interactive charts showing interest growth over time.

Action and Expression
- Have students create digital presentations or posters about investment options.
- Allow students to simulate investing with classroom stock market games.
- Encourage reflective journals or essays on personal savings and investment plans.

**Supporting Multilingual/English Learners**

**Related *CELP standards:*** | **Learning Targets**

| CELP Level | LT1 | LT2 | LT3 | LT4 |
|---|---|---|---|---|
| **Emerging** | I can begin to understand what savings accounts are. | I can recognize some factors that differentiate financial institutions. | I can start to understand different types of financial accounts. | I can notice that inflation affects savings over time. |
| **Expanding** | I can explain different types of savings accounts. | I can evaluate some aspects of financial institutions when choosing a savings account. | I can compare features of different accounts and consider how mobile payments impact savings. | I can explain how inflation impacts the value of savings and the role of interest rates. |
| **Building** | I can analyze and explain various types of | I can evaluate and compare financial | I can analyze different accounts, compare | I can analyze the effect of inflation on savings |

| | | | | |
|---|---|---|---|---|
| | savings accounts. | institutions to select the best savings account based on key factors. | features, and assess how mobile payments affect long-term savings growth. | value and the relationship between interest rates and purchasing power. |

| Lesson Sequence | Learning Target | Success Criteria | Assessment |
|---|---|---|---|
| 1 | **Learning Target 1**<br>I can explain several different types of savings accounts | • I can compare the features of regular savings accounts, money market accounts, and CDs. | • Students will compare several types of savings accounts to explain how features like, interest rates, and minimum balance requirements meet different financial needs.<br>• Students will research financial institutions to determine which offers the best savings option based on interest rates, fees, and account features.<br>• Students will use real or simulated data to explain how inflation reduces purchasing power. |
| 1 | **Learning Target 2**<br>I can evaluate different financial institutions and select the best option for a savings account based on interest rates, fees, and other key factors. | • I can select a preferred location for a savings account based on comparison of interest rates and fees at different types of financial institutions.<br>• I can calculate simple and compound interest to illustrate the power of compounding. | |
| 2 | **Learning Target 3**<br>I can analyze different types of financial accounts, compare their features, and evaluate the impact of mobile payment accounts on long-term savings growth. | • I can compare and contrast the features of mobile payment accounts, and checking/ savings accounts. | |
| 2 | **Learning Target 4**<br>I can explain how inflation affects the value of savings over time and analyze the relationship between interest rates and purchasing power. | • I can illustrate how inflation can reduce the purchasing power of savings over time if the nominal interest rate is lower than the inflation rate. | |

| **Unit Title** | |
|---|---|
| Unit 8: Investing | |
| **Relevant Standards: Bold indicates priority** | |
| **National Standards for Personal Financial Education**<br>**Investing 12.1** A person's investment risk tolerance depends on factors such as personality, financial resources, investment experiences, and life circumstances.<br>**Investing 12.2** Investors earn investment returns from price changes and annual cash flows (such as interest, dividends or rent). The nominal annual rate of return is the annual total dollar benefit as a percentage of the beginning price.<br>**Investing 12.3** Investors expect to earn higher rates of return when they invest in riskier assets.<br>**Investing 12.6** When making diversification and asset allocation decisions, investors consider their risk tolerance, goals, and investing time horizon.<br>**Investing 12.8** Tax rules affect the rate of return on different investments, and can vary by holding period, type of income, and type of account.<br>**Investing 12.13** Investors often compare the performance of their investments against a benchmark, such as a diversified stock or bond index. | |
| **Essential Question(s)** | **Enduring Understanding(s)** |
| 1. Why is investing an important part of achieving long-term financial goals?<br>2. How do stocks help individuals build wealth and achieve financial goals?<br>3. How do bonds contribute to a balanced and secure investment portfolio?<br>4. How do mutual funds make investing more accessible and diversified for individuals?<br>5. How do index funds help investors build wealth with lower costs and less risk? | 1. Investing allows individuals to grow their wealth over time, outpace inflation, and build financial security for future goals such as retirement, education, and major life expenses.<br>2. Stocks represent ownership in a company and offer the potential for growth through capital gains and dividends, but they also carry varying levels of risk.<br>3. Bonds are loans made to governments or corporations that provide fixed returns, offering stability and predictable income to balance the risks of other investments.<br>4. Mutual funds pool money from many investors to purchase a variety of assets, providing diversification and professional management to help reduce individual risk.<br>5. Index funds track the performance of a market index, offering broad diversification and lower fees, which make them an effective long-term investment strategy. |
| **Demonstration of Learning** | **Pacing for Unit** |
| • Students will compare different investment products including stocks,bonds, mutual funds and index funds to evaluate their features, risks and returns.<br>• Students will determine ways to diversify an investment portfolio based on goals and risk tolerance.<br>• Students will research and present real stock market data.<br>• Students will identify major stock indexes and analyze the performance compared to other investments.<br>• Students will describe how mutual funds pool money to buy diversified investment portfolios managed by professionals. | • 5 classes of instruction<br>• 1 class for assessment/performance-based task |
| **Family Overview (link below)** | **Integration of Technology** |
| [Personal Finance Family Overview]() | Research using various websites such as Google and Yahoo finance. |
| **Unit-specific Vocabulary** | **Aligned Unit Materials, Resources, and Technology (beyond core resources)** |

| | |
|---|---|
| 401k / 403b Roth and Traditional<br>Active Trading<br>Asset Allocation<br>Bond<br>Brokerage Account<br>Compound Return<br>Coupon<br>Diversification<br>Dividend<br>Index Fund<br>Individual Retirement Account (IRA) - Traditional and Roth<br>Inflation<br>Investment<br>Mutual Fund<br>Passive Investing<br>Pension<br>Portfolio<br>Return on Investment (ROI)<br>Risk<br>S&P 500<br>Shareholder<br>Social Security<br>Stock<br>Target Date Fund (TDF)<br>Vesting | Google and yahoo finance<br>Financial websites<br>Next Gen Personal Finance |
| **Opportunities for Interdisciplinary Connections** | **Anticipated misconceptions** |
| • Math: apply percent change, compound growth<br>• Economics: Connect inflation, risk, supply and demand and capital markets, investing decisions<br>• Technology: use online investment simulators, stock tracking apps.<br>• ELA: critical reading and writing through research on public companies<br>• Psychology: How emotions, cognitive biases influence decisions and market volatility. | • Investing is only for rich people or adults.<br>• Saving and investing are the same thing.<br>• Investing is basically gambling.<br>• If a stock value drops, the investor loses all of their money.<br>• The safest investments are always the best<br>• Diversification just means buying lots of stocks.<br>• Bonds, mutual funds and index funds are all the same thing.<br>• Once I invest, I can't lose money. |
| **Connections to Prior Units** | **Connections to Future Units** |
| Unit 4 & 7: The Investing Unit connects to the Budgeting and Savings units. | A deep-dive is done regarding investing in the Advanced Personal Finance class. |
| **Differentiation through *Universal Design for Learning***<br>**UDL Indicator and Teacher Actions** | |
| Engagement<br>• Use stories of real investors or success stories to inspire interest.<br>• Incorporate interactive simulations of investing in stocks, bonds, or mutual funds.<br>• Offer choices for students to explore different investment types through projects, such as creating a digital investment portfolio or presentation<br>Representation | |

- Present concepts through videos, infographics, and visual diagrams explaining stocks, bonds, mutual funds, and index funds.
- Provide bilingual glossaries and simplified explanations of investment terminology.
- Use visual aids like charts showing growth over time for different investment options.

Action and Expression

- Enable students to demonstrate understanding by creating digital presentations, posters, or videos explaining various investment types and their roles.
- Use role-playing activities where students act as investors making decisions between stocks, bonds, and mutual funds.
- Allow students to simulate investing with classroom stock market games or budgeting tools to see how investments grow over time.

**Supporting Multilingual/English Learners**
**Related *CELP standards* and Learning Targets**

| CELP Level | LT1 | LT2 | LT3 | LT4 | LT5 |
|---|---|---|---|---|---|
| **Emerging** | I can begin to understand the concept of investing. | I can recognize what a stock is. | I can recognize what a bond is. | I can recognize what a mutual fund is. | I can notice what an index fund is. |
| **Expanding** | I can explain why investing is important for long-term financial goals. | I can define what a stock is and describe its role in investing. | I can define what a bond is and explain its role. | I can define a mutual fund and explain its role. | I can define an index fund and explain its purpose in investing. |
| **Building** | I can analyze why investing is necessary to meet financial needs over the long term. | I can explain in detail what stocks are and how they function in personal investing. | I can analyze bonds and their role in a personal investment portfolio. | I can evaluate mutual funds and their role in diversification and investing. | I can analyze index funds and explain their benefits in personal investing. |

| Lesson Sequence | Learning Target | Success Criteria | Assessment |
|---|---|---|---|
| 1 | **Learning Target 1**<br>I can explain why investing is necessary to meet long-term financial needs and goals. | • I can define investing and distinguish it from saving<br>• I can identify reasons for investing, including outpacing inflation<br>• I can explain the importance of diversification. | Students will create long-term financial goals |
| 2 - 5 | **Learning Target 2**<br>I can define what a stock is and explain its role in personal investing. | • I can define what a stock is.<br>• I can explain how an investor earns a profit from owning stocks.<br>• I can identify reasons why people invest in stocks.<br>• I can give an example of a company that issues stock.<br>• I can describe how stock value can increase or decrease over time. | Students will research and analyze a publicly traded company's stock to explain how ownership, dividends and capital gains contribute to personal wealth. |
| 2-5 | **Learning Target 3**<br>I can define what a bond is and explain its role in personal | • I can define what a bond is.<br>• I can identify reasons why people invest in bonds. | Students will examine sample bond offerings. |

| | | | |
|---|---|---|---|
| | investing. | • I can explain how an investor earns a profit from investing in bonds.<br>• I can explain the difference between municipal and corporate bonds.. | |
| 2-5 | **Learning Target 4**<br>I can define what a mutual fund is and explain its role in personal investing. | • I can define what a mutual fund is.<br>• I can identify reasons why people invest in mutual funds.<br>• I can explain how an investor earns a profit from investing in mutual funds. | Students will compare mutual funds to explain how pooled investments provide diversification and professional management for individual investors |
| 2-5 | **Learning Target 5**<br>I can define what an index fund is and explain its role in personal investing. | • I can define a stock index.<br>• I can define what an Index Fund is.<br>• I can identify reasons why people invest in Index Funds.<br>• I can identify commonly followed stock indexes.<br>• I can explain how an investor earns a profit from investing in Index Funds. | Students will evaluate an index fund to explain how tracking market performance offers a low-cost, diversified approach to long-term investing. |

**BRISTOL PUBLIC SCHOOLS**
**Bristol, Connecticut**

December 3, 2025
(**Meeting Date**)

| | |
|---|---|
| | **Information Item** |
| X | **Decision Item** |

# AGENDA REPORTING FORM

**TOPIC:** Curriculum Revision: Personal Finance and Investment

**BACKGROUND:**
CT state legislation requires local and regional boards of education to provide learning opportunities for all students to accumulate one-half credit in personal financial management and financial literacy courses commencing with the graduating class of 2027. This course is designed to meet that requirement and provide all students with a common experience in personal finance.

This course provides students with the essential knowledge and skills to manage their personal finances and make informed financial decisions. Through real-world applications, interactive projects, and hands-on activities, students will learn about behavioral economics, budgeting, banking, credit, paychecks and taxes, introductory investing, and retirement planning.

By the end of the course, students will develop responsible financial habits. This class empowers students with the confidence to make smart financial choices, setting them up for lifelong financial success! Students who want to continue their financial education should enroll in Advanced Personal Finance upon the successful completion of this course.

**COST:** $0 **FUNDING SOURCE:** N/A

**RECOMMENDATIONS/COMMENTS:**

**ATTACHMENTS:**
Personal Finance & Investment CURRICULUM (2024-25).pdf

**TOPIC PRESENTER:** Laura Lanza, Secondary STEM Supervisor

**CONTACT NUMBER:** (860) 584-7074

**ACTING SUPERINTENDENT:** Iris White
Iris White

| Bristol Board of Education, Bristol CT | |
|---|---|
| Presented at Board Meeting: | |
| Approved: | |
| Order Filed: | |
| Referred to: | |

<table>
<tr><th>Course Title</th><th>Content Area</th><th>Grade Level</th><th>Credit (if applicable)</th></tr>
<tr><td>PLTW Civil Engineering and Architecture - UNH</td><td>CTE:<br>Engineering and Technology</td><td>9-12</td><td>1 High School Credit<br>3 College Credits via UNH upon meeting UNH criteria</td></tr>
</table>

**Course Description**

*Improving our world through thoughtful building design and development!*

*Students learn the fundamentals of building design, site design, and development. They apply math, science, and standard engineering practices to design both residential and commercial projects and document their work using 3D architectural design software.*

*You can change the world, one project at a time.*

Civil Engineering and Architecture (CEA) is a high school level specialization course in the PLTW Engineering Program. In CEA students are introduced to important aspects of building and site design and development. They apply math, science, and standard engineering practices to design both residential and commercial projects and document their work using 3D architectural design software. Utilizing the activity-project-problem-based (APB) teaching and learning pedagogy, students will progress from completing structured activities to solving open-ended projects and problems that require them to develop planning, documentation, communication, and other professional skills.

Through both individual and collaborative team activities, projects, and problems, students will solve problems as they practice common design and development protocols such as project management and peer review. Students will develop skill in engineering calculations, technical representation and documentation of design solutions according to accepted technical standards, and use of current 3D architectural design and modeling software to represent and communicate solutions.

Building enthusiasm for and a real understanding of role, impact, and practice of civil engineering and architecture as it relates to building design and development is a primary goal of the course.

(Source: PLTW Civil Engineering Course Resume and Course Outline)

<table>
<tr><th>Aligned Core Resources</th><th>Connection to the BPS Vision of the Graduate</th></tr>
<tr><td>
• My PLTW Online (some elements require PLTW login credentials)<br>
  ○ PLTW Civil Eng & Arch Course Resume<br>
  ○ PLTW Civil Eng & Arch Course Outline<br>
  ○ PLTW Civil Eng & Arch Standards Alignment<br>
• Common Core State Standards for English<br>
• Language Arts Anchor Standards<br>
• Common Core State Standards for Mathematics<br>
• Next Generation Science Standards<br>
• Standards for Technological and Engineering Literacy
</td><td>
Meaningfully contribute to a global society<br>
  • Collaboration<br>
Effectively communicate in a global society<br>
  • Communications and Technology Literacy<br>
Demonstrate Academic Knowledge and Skills<br>
  • Critical Thinking and Problem Solving<br>
Professional Skills<br>
  • Team collaboration<br>
  • Project management<br>
  • Problem-solving<br>
  • Communication skills<br>
  • Presentation skills<br>
  • Technical writing
</td></tr>
<tr><th>Additional Course Information:<br>Knowledge/Skill Dependent courses/prerequisites</th><th>Link to Completed Equity Audit</th></tr>
<tr><td>Concurrent enrollment in grade level appropriate math class.</td><td>Equity Curriculum Review Audit - Civil Eng & Arch (2025-26)</td></tr>
</table>

**Standard Matrix**

Common Core State Standards for English Language Standards
- Anchor Standards: Research to Build and Present Knowledge
- Writing: Text Types and Purposes
- Reading Informational Text: Key Ideas and Details

Common Core State Standards for Mathematics
- Geometry: Visualization and Spatial Reasoning
- Statistics and Probability: Interpreting Categorical and Quantitative Data

- Statistics and Probability: Making Inferences and Justifying Conclusions
- Number and Quantity: Quantities

Next Generation Science Standards

- Engineering Design: Developing Possible Solutions
- Engineering Design: Evaluating Solutions
- Engineering Design: Analyzing and Interpreting Data
- Engineering Design: Optimizing the Design Solution
- Engineering Design: Developing and Using Models

Standards for Technological and Engineering Literacy

- Creativity and Innovation
- Communication and Collaboration
- Understanding and Applying Engineering Concepts
- Global Awareness in Engineering
- Technology and Engineering in Design
- Collaboration and Teamwork

**Unit Links**

Unit 1: Overview of Civil Engineering and Architecture

Unit 2: Residential Design

Unit 3: Commercial Applications

Unit 4: Commercial Building Systems

| Unit Title | |
|---|---|
| Unit 1: Overview of Civil Engineering and Architecture | |
| **Relevant Standards** | |
| PLTW Civil Eng & Arch Standards Alignment<br>• Common Core State Standards for English Language Standards (Page 2)<br>• Common Core State Standards for Mathematics (Page 6)<br>• Next Generation Science Standards (Page 13)<br>• Standards for Technological and Engineering Literacy (Page 19) | |
| **Essential Questions** | **Enduring Understandings** |
| Lesson 1<br>• How does the quality and type of infrastructure define and sustain a civilization, and what are the consequences when that foundation is neglected?<br>• What is the inherent duality between the artistic pursuit of beauty and user experience, and the scientific requirement for structural integrity and safety?<br>Lesson 2<br>• How is the successful synthesis of Art and Science used by designers to address complex modern global challenges like sustainability, resilience, and urbanization?<br>• How do the distinct roles of the architect (form/space) and the civil engineer (system/function) collaborate to effectively meet the essential needs of the communities they serve? | • Infrastructure, designed by civil engineers and architects, is the often-unseen foundation upon which all civilizations are built and sustained. The quality and type of this infrastructure (roads, bridges, buildings, water systems) directly determine a society's ability to grow, adapt, and provide quality of life for its citizens.<br>• Architecture and civil engineering are disciplines of duality, requiring a constant negotiation between two opposing forces: the quantifiable precision of Science (structure, safety, and function) and the qualitative artistry of Art (aesthetics, user experience, and creativity).<br>• Successful and lasting designs are not created by prioritizing one force over the other (Art vs. Science) but by mastering the synthesis of both. Civil engineers utilize their skills and knowledge to address complex modern challenges (like sustainability and urbanization) by integrating artistic innovation with scientific methodology.<br>• While the architect focuses primarily on the form and human interaction within spaces, and the civil engineer focuses on the function and safety of the overall system, both professions share the ultimate responsibility of shaping the built environment to serve human needs. |
| **Demonstration of Learning** | **Pacing for Unit** |
| Written documents, formative and summative assessments, hands on activities demonstrating knowledge of architectural styles. | 7 classes<br>**Integration of Technology**<br>Tools and Software<br>• Building Design Software - Use of a 3D program (Autodesk Revit) to complete architectural design<br>• Structural Analysis Tool - MDSolids<br>• Survey equipment - Autolevel<br>• Budgeting and Project Management |
| **Family Overview and Unit Description** | |
| Unit 1 provides an introduction and overview to the past accomplishments within the fields of civil engineering and architecture as well as a brief introduction to the wide variety of careers within the fields of civil engineering and architecture.<br><br>Lesson 1.1 History of Civil Engineering and Architecture<br>The goal of this lesson is to introduce students to the vast history of accomplishments in civil engineering and architecture. The study and improvements on these accomplishments have paved the way for the structures that we use today. In this lesson students will begin to build a common vocabulary related to architectural styles and features, structural systems, and the elements and principles of design.<br><br>Lesson 1.2 Careers in Civil Engineering and Architecture<br>This lesson will provide foundation and perspective for students regarding careers in civil engineering and architecture as they venture through the remainder of the course. The primary duties and responsibilities of civil engineers (and related specialty disciplines) and architects are presented as well as the traditional educational and accreditation requirements that must be met in order to become a professional engineer and architect. Career connections and relationships between these two types of professionals and other stakeholders involved in building design and development are also introduced. | |

(Source: PLTW Civil Engineering Course Outline)

| Unit-Specific Vocabulary | Aligned Unit Materials, Resources, and Technology (beyond core resources) |
|---|---|
| Civil Engineers<br>Architects<br>Engineering<br>Roman Engineering<br>Vernacular Architecture<br>Arch<br>Dome<br>Aqueducts<br>Design Elements<br>Line<br>Color<br>Form and Shape<br>Space<br>Texture<br>ValueBalance<br>Rhythm<br>Emphasis<br>Proportion and scale<br>Movement<br>Contrast<br>Unity | N/A |
| **Opportunities for Interdisciplinary Connections** | **Anticipated Misconceptions** |
| • Math - Measurement and scale are applied in creating accurate models, drawings, and plans.<br>• Art - Architectural aesthetics rely on principles of art and design such as balance, proportion, rhythm, and unity.<br>• Social Studies - Students will learn about vernacular architecture and create a model building for a chosen architectural style.<br>• Social Studies - Students will be involved in a design charrette activity in which they will need to come up with a solution to a real world problem. In order to accomplish this, students will need to research all of the stakeholder's roles as well as become familiar with those occupations current and future outlook | Role of the Architect vs. Engineer<br>Architects and civil engineers do the same job (i.e., that civil engineers only design buildings, or that architects are only concerned with aesthetics).<br>Design Process<br>The design process is a simple, linear path (Idea →Design → Build), rather than an iterative process involving loops for testing, evaluation, and redesign.<br>Problem Formulation<br>The client's initial statement defines the true problem; students fail to see that a major part of design is defining and refining the problem itself.<br>Soft Skills<br>Technical skills (CAD, math) are the only things that matter; they underestimate the importance of communication, collaboration, and ethical decision-making in professional practice. |
| **Connections to Prior Units** | **Connections to Future Units** |
| N/A | Students will take their understanding of architecture and architectural styles to create their own designs in future units. |

**Differentiation through *Universal Design for Learning***
**Teacher Actions to Provide Differentiated Support**

Learning Target 1: I can understand how the work of civil engineers and architects shaped society.
- Connect learning to real-world impacts of engineering and architecture on communities and culture.
- Encourage students to link what they know about society and history to engineering and architecture.
- Promote discussion on shared human needs addressed through design and infrastructure.

Learning Target 2: I can understand the difference between the art of architecture and civil engineering and the science of architecture and civil engineering.
- Use visual models, sketches, and physical examples to show artistic versus scientific aspects.
- Illustrate through multiple media: Support understanding through diagrams, videos, models, and case studies.
- Clarify how artistic and scientific perspectives contribute differently to design and function.

Learning Target 3: I can understand how civil engineers contribute to the solutions of the Grand Challenges for Engineering.
- Connect classroom content to global, real-world challenges.
- Help students see how civil engineering principles apply across global problems.
- Use feedback to emphasize progress toward understanding big, complex systems.

Learning Target 4: I can understand the difference between a Civil Engineer and an Architect.
- Use diagrams, Venn diagrams, and examples to compare roles.
- Define professional terms clearly (e.g., structural integrity, aesthetics, design intent).
- Help students organize differences and overlaps visually.

**Supporting Multilingual/English Learners**
**Related CELP standards aligned to Learning Targets**

| | Emerging | Bridging | Expanding |
|---|---|---|---|
| **LT1** | I can match pictures or words of structures (roads, buildings) to the word society. I can name one thing a civil engineer built that we use. | I can describe with simple phrases how civil engineers and architects have impacted our community (e.g., better roads, tall buildings). | I can explain how the design and construction choices of civil engineers and architects have influenced community development and quality of life. |
| **LT2** | I can identify the difference between a design's 'look' (art) and its 'safety/function' (science) using simple terms or visuals. | I can compare the focus of art (aesthetics, human experience) and science (structure, safety) in a design project, using short sentences. | I can analyze and differentiate the interdependent roles of art (creativity, aesthetics) and science (technical precision, stability) in successful architectural and civil engineering projects. |
| **LT3** | I can point to or name a problem (e.g., clean water) and say how an engineer helps (e.g., builds a water pipe). | I can summarize the civil engineer's role in solving one Grand Challenge (e.g., sustainable water systems) using key vocabulary. | I can evaluate the diverse contributions of civil engineers to the Grand Challenges, such as designing sustainable infrastructure to address issues like clean water or urbanization. |
| **LT4** | I can state one job for a Civil Engineer (e.g., builds bridges) and one job for an Architect (e.g., designs houses). | I can contrast the main responsibilities of a Civil Engineer (focus on structure/systems) and an Architect (focus on design/space) using a few sentences. | I can articulate the distinct professional roles and areas of expertise for Civil Engineers (e.g., infrastructure, structural integrity) and Architects (e.g., spatial design, aesthetic functionality). |

| Lesson | Learning Target | Success Criteria/ Assessment |
|---|---|---|
| Lesson 1 *History of Civil Engineering and Architecture* | LT 1: I can understand how the work of civil engineers and architects shaped society. | • I can describe specific examples of how civil engineers and architects have influenced the development of communities, cities, or civilizations.<br>• I can explain how infrastructure (roads, bridges, buildings, water systems) supports societal growth and daily life. |
| | LT 2: I can understand the difference between the art of architecture and civil engineering and the science of architecture and civil engineering. | • I can clearly explain what "art" means in architecture and civil engineering (creativity, aesthetics, design, emotion, user experience).<br>• I can clearly explain what "science" means in architecture and civil engineering (structure, function, materials, safety, precision).<br>• I can identify differences between the artistic and scientific sides of each field.<br>• I can describe how art and science work together to create designs that are both beautiful and functional. |
| | LT 3: I can understand how civil engineers contribute to the solutions of the Grand Challenges for Engineering. | • I can describe how civil engineers use their skills and knowledge to address the challenge.<br>• I can explain specific methods, systems, or technologies civil engineers might use (e.g., water systems, sustainable infrastructure, transportation planning). |
| Lesson 2 *Careers in Civil Engineering and Architecture* | LT 4: I can understand the difference between a Civil Engineer and an Architect. | • I can describe the main responsibilities of a civil engineer (e.g., designing, constructing, and maintaining infrastructure like bridges, roads, and water systems).<br>• I can describe the main responsibilities of an architect (e.g., designing buildings, planning spaces, focusing on aesthetics and usability). |

<table>
<tr><th colspan="2">Unit Title</th></tr>
<tr><td colspan="2">Unit 2: Residential Design</td></tr>
<tr><th colspan="2">Relevant Standards</th></tr>
<tr><td colspan="2">PLTW Civil Eng & Arch Standards Alignment<ul><li>Common Core State Standards for English Language Standards (Page 2)</li><li>Common Core State Standards for Mathematics (Page 6)</li><li>Next Generation Science Standards (Page 13)</li><li>Standards for Technological and Engineering Literacy (Page 19)</li></ul></td></tr>
<tr><th>Essential Questions</th><th>Enduring Understandings</th></tr>
<tr><td>Lesson 1<ul><li>How do material and system selection (e.g., roofing, plumbing, energy) affect the long-term maintenance costs and environmental impact of a residential structure?</li><li>How has the use of 3D modeling software affected the design and construction industry?</li></ul>Lesson 2<ul><li>How do design choices impact a home's constructability and cost?</li><li>It has been said that, “Having a vision without action is a daydream; Taking action without a vision is a nightmare!” How does this apply to architectural design?</li></ul>Lesson 3<ul><li>How do architects and engineers ethically balance client vision, budget, and the imperative for sustainable design?</li><li>What are the key technical skills, including computational, mathematical, and regulatory knowledge (like building codes), required to successfully design, model, and estimate a residential project?</li></ul></td><td><ul><li>The successful design of a residence requires an integrated understanding of its constructability, cost, and functionality. Architectural choices, such as the roof style and material selection, directly influence the initial budget, the required construction methods, and the long-term maintenance needs of the structure.</li><li>Responsible architectural and engineering practice requires balancing client vision and budget with the ethical imperative for sustainability and public safety. Sustainable design is not merely an option but a professional necessity, requiring holistic strategies across energy, water, materials, and waste, even when these choices may affect short-term costs.</li><li>Effective architectural design requires both creative vision and pragmatic, analytical action. Computational and mathematical skills (including geometry, measurement, and cost analysis) are essential for translating creative concepts into safe, accurate, and functional designs that comply with building codes. Modern tools like 3D modeling enhance this process by improving visualization and reducing errors.</li><li>Every design decision, from the smallest fixture to the major structural system, contributes to a home's overall environmental impact and life-cycle cost. Architects and engineers must weigh initial savings against long-term durability and efficiency to ensure the design delivers lasting value and minimizes negative effects on the environment and future generations.</li></ul></td></tr>
<tr><th>Demonstration of Learning</th><th>Pacing for Unit</th></tr>
<tr><td rowspan="3">Written formative and summative assessments.<ul><li>Design a small single family residential structure that reflects a set of basic building guidelines</li><li>Create a site opportunities map and site plan for a small residential structure</li><li>Create a simple residential electrical plan</li><li>Document a residential design with construction drawings and a 3D computer model using 3D architectural software</li></ul></td><td>27 Classes</td></tr>
<tr><th>Integration of Technology</th></tr>
<tr><td>Tools and Software<ul><li>Building Design Software - Use of a 3D program (Autodesk Revit) to complete architectural design</li><li>Structural Analysis Tool - MDSolids</li><li>Survey equipment - Autolevel</li><li>Budgeting and Project Management</li></ul></td></tr>
<tr><th>Family Overview & Unit Description</th><th></th></tr>
<tr><td colspan="2">This unit of study introduces students to standard practice in the design of single family homes and provides an opportunity for students to develop a small single family home design that incorporates sustainable design practices as well as universal design features. Students will be introduced to building codes and their impact on design as well as common wood-framed residential construction techniques and practices. Students also will investigate the cost of construction and the significant impact of the choice of construction materials and practices on the ongoing cost of energy for heating and cooling. They will apply this knowledge to the design of a small, affordable home.<br><br>Lesson 2.1 Building Design and Construction<br>In this lesson students will learn typical wood-framed residential construction techniques and practices. They will build a common vocabulary related to building components and materials and become familiar with a variety of residential framing</td></tr>
</table>

methods and roof styles. In addition, students will be introduced to technical documentation of residential structures and will use 3D architectural modeling software to model and document the design of a small outdoor storage structure.

Lesson 2.2 Cost and Efficiency Analysis

In this lesson students investigate the cost of construction and the recurring energy costs associated with design decisions and construction techniques. Students will have the opportunity to perform quantity take-offs and cost estimates related to parts of small construction projects. In addition students will learn about and compare the energy efficiency of a variety of construction materials and calculate the rate of heat loss or gain through a building envelope which can be used to estimate energy demands for heating and cooling a building.

Lesson 2.3 Residential Design

In this lesson students apply elements of good residential building and site design to design a small affordable home for a client based on information gathered during a client interview and meetings. Students will perform code research and develop a design that meets applicable building codes and requirements as well as universal design principles. Students will also learn about sustainable building practices which they will apply to their home design in an effort to reduce the environmental impact of the building. Basic site design and orientation considerations are presented to guide students in appropriately locating the home on the building site to improve usability and reduce environmental impact. During the design process, students will also be introduced to a variety of residential foundation systems, basic residential electrical system components, plumbing systems and water supply calculations, and wastewater disposal and treatment systems. They will include consideration of these systems in their design development.

(Source: PLTW Civil Engineering Course Outline)

| **Unit-Specific Vocabulary** | **Aligned Unit Materials, Resources, and Technology (beyond core resources)** |
|---|---|
| Wood Frame Construction<br>Studs<br>Insulation<br>Floor Joists<br>Subfloor<br>Top plate<br>Roof Truss<br>Sheathing<br>Siding | N/A |

| **Opportunities for Interdisciplinary Connections** | **Anticipated Misconceptions** |
|---|---|
| • Students will use their English language skills in the development of presentations.<br>• Math - Measurement and scale are applied in creating accurate models, drawings, and plans.<br>• Math - Students will rearrange formulas to perform calculations for stormwater management and wastewater management.<br>• Social Studies - Students will research and complete an activity on Land Use Development and Ordinances.<br>• Art - Architectural aesthetics rely on principles of art and design such as balance, proportion, rhythm, and unity. | Building Codes<br>Building codes are only restrictions that stifle creativity, rather than a necessary baseline for safety, health, and minimum performance.<br>Cost Estimation<br>The materials cost is the main or only factor in a construction budget, neglecting labor, permits, contingencies, and long-term maintenance/utility costs.<br>3D Modeling & CAD<br>The 3D model (CAD) is the final deliverable, rather than a tool for analysis, communication, and generating construction documentation (2D drawings, schedules).<br>Sustainability (Residential)<br>Sustainability is only about adding solar panels or green roofs; students may fail to consider passive design strategies like building orientation and insulation as fundamental to energy efficiency.<br>Load Paths<br>Loads (weight) travel straight down through walls; students may not grasp the concept of load distribution through roofs, beams, headers, and foundations. |

| **Connections to Prior Units** | **Connections to Future Units** |
|---|---|
| Students will be able to use their knowledge of architectural styles to help design their residential dwelling. | Students will use the knowledge they gain from the residential unit and be able to apply the math and Autodesk Revit knowledge to future projects. |

**Differentiation through *Universal Design for Learning***

| Teacher Actions to Provide Differentiated Support |
|---|
| Learning Target 1: I can understand why it is important for an architect to know the details of how residential buildings are constructed in order to design a house.<br>● Connect design concepts to what students already know about construction.<br>● Show how knowing building details makes architectural designs realistic and functional.<br>● Use models, drawings, and 3D visuals to show how design connects to construction.<br>Learning Target 2: I can understand how the use of 3D modeling software has affected the design and construction industry.<br>● Encourage students to explore 3D models, renderings, and simulations.<br>● Allow different ways to show understanding (e.g., modeling, screenshots, or presentations).<br>● Connect to real-world software and industry practices students may use in careers.<br>Learning Target 3: I can understand that if a cost estimate indicates that a residential design is significantly over budget, appropriate actions will need to be taken to reduce the cost.<br>● Help students recognize how budget impacts design choices.<br>● Support analyzing budgets, materials, and trade-offs.<br>● Encourage reflection and problem-solving when budgets must be adjusted.<br>Learning Target 4: I can understand what Green Architecture is and why it is important.<br>● Connect sustainability to global and local environmental challenges.<br>● Link to students' existing understanding of environmental responsibility.<br>● Encourage students to see how they can make a positive impact through design. |

**Supporting Multilingual/English Learners**
**Related CELP standards aligned to Learning Targets**

| | Emerging | Bridging | Expanding |
|---|---|---|---|
| **LT1** | I can match the architect's drawing to the building process (e.g., foundation, walls). I can say why a design must be possible to build. | I can explain simply that an architect needs to know construction details to make sure the house design is safe and possible to build (e.g., walls must hold the roof). | I can analyze and justify the importance of an architect's construction knowledge in creating a safe, functional, and structurally sound residential design. |
| **LT2** | I can identify a 3D model (picture) and say that it helps designers see the design better or find problems. | I can describe with some detail how 3D modeling software helps the industry by making designs easier to visualize and allowing teams to find errors early. | I can evaluate the transformative impact of 3D modeling software on design precision, error reduction, collaboration, and overall efficiency within the construction industry. |
| **LT3** | I can identify the design as "too expensive" and suggest one action like making the house smaller or using cheaper materials. | I can list and explain two or three actions a designer could take to bring a residential project that is over budget back into the spending limit (e.g., simplifying the roofline, reducing square footage). | I can propose and prioritize appropriate design and material adjustments necessary to effectively mitigate a significant budget overrun while maintaining the client's core requirements. |
| **LT4** | I can name one thing that makes a building "green" (e.g., solar panels, recycled materials) and say it is better for the Earth. | I can describe what Green Architecture is (sustainable design) and give a few reasons why it is important (saves energy, reduces waste). | I can articulate the principles of Green Architecture (sustainability, energy efficiency, site integration) and justify its importance in minimizing environmental impact and promoting long-term resource conservation. |

| Lesson | Learning Target | Success Criteria/ Assessment |
|---|---|---|
| Lesson 1<br>*Building Design and Construction* | LT 1: I can understand why it is important for an architect to know the details of how residential buildings are constructed in order to design a house. | ● I can explain how design decisions affect construction (e.g., materials, methods, cost, and structure).<br>● I understand that architects must design structures that can actually be built safely and efficiently.<br>● I can identify basic construction methods used in residential buildings (e.g., framing, foundation, roofing, insulation).<br>● I can explain how knowing these methods helps architects create accurate and realistic designs. |
| | LT 2: I can understand how the use of 3D modeling software has affected the design and construction industry. | ● I can explain what 3D modeling software is and how it is used in architecture and engineering.<br>● I can explain how 3D modeling software helps designers |

| | | |
|---|---|---|
| | | visualize and communicate ideas more clearly to clients, engineers, and builders.<br>• I can describe how 3D modeling improves accuracy in measurements, material estimation, and design details. |
| Lesson 2.2<br>*Cost and Efficiency Analysis* | LT 3: I can understand that If a cost estimate indicates that a residential design is significantly over budget, then appropriate actions will need to be taken to reduce the cost. | • I can explain what a cost estimate is and why it is important in the design and construction process.<br>• I understand that a cost estimate helps determine whether a design is financially realistic before construction begins.<br>• I understand the impact of being over budget on the client, materials, and construction timeline. |
| Lesson 2.3<br>*Residential Design* | LT 4: I can understand what Green Architecture is and why it is important. | • I can define Green Architecture as designing buildings that are environmentally responsible, energy-efficient, and sustainable.<br>• I can identify the main goals of Green Architecture, such as reducing energy use, conserving water, and minimizing waste.<br>• I can explain how buildings impact the environment through energy consumption, water use, and materials. |

**Unit Title**

Unit 3: Commercial Applications

**Relevant Standards**

[PLTW Civil Eng & Arch Standards Alignment]

- Common Core State Standards for English Language Standards (Page 2)
- Common Core State Standards for Mathematics (Page 6)
- Next Generation Science Standards (Page 13)
- Standards for Technological and Engineering Literacy (Page 19)

**Essential Questions**

Lesson 1

- How do the distinct legal and regulatory frameworks (including land use regulations, building codes, and energy conservation codes) and the increased scale of construction fundamentally differentiate the design and development process for a commercial project from a residential one?

Lesson 2

- What core engineering principles and specialized mathematical competencies are required to design, analyze, and select materials for a complex commercial structure, ensuring structural integrity while adhering to the principle that "Form Follows Function"?

Lesson 3

- How must a commercial designer integrate and optimize a building's utility systems (e.g., plumbing, HVAC, electrical) to comply with codes like the International Energy Conservation Code (IECC) and achieve holistic building efficiency and sustainable performance?

Lesson 4

- How do design professionals utilize advanced site analysis (like differential surveying) and employ the philosophy of minimal environmental impact ("touch the earth lightly") to ensure a commercial building project is successfully and ethically integrated into its community and environment?

**Enduring Understandings**

- Commercial design is fundamentally governed by a complex framework of land use regulations (zoning and community planning) and strict building code requirements (safety, accessibility, and structural integrity). The increased scale and technical complexity of commercial projects—as compared to residential—require designers to navigate these constraints, balancing community needs, public safety standards, and project development goals.
- Structural integrity and safety are guaranteed through the application of precise mathematical and engineering principles (e.g., algebra, geometry, physics-based calculations). Successful structural design, which often follows the principle that "Form Follows Function," relies on analyzing load forces and selecting efficient material shapes, such as the I-beam, to prevent failures and optimize the strength-to-weight ratio of the structure.
- A successful commercial building is a cohesive system where the design of utility systems (HVAC, plumbing, electrical) is fully integrated into the overall architectural plan. Compliance with performance standards, such as the International Energy Conservation Code (IECC), is mandatory, ensuring that the building is not only functional and safe but also highly efficient, thus supporting broader goals of green building and sustainability.
- Responsible design and development demand a commitment to environmental stewardship, embodying the philosophy to "touch the earth lightly." Designers and engineers must utilize accurate site analysis (like differential surveying) and employ current sustainable construction practices to minimize environmental impact, manage resources responsibly, and ensure that new commercial structures contribute positively to their surrounding community.

**Demonstration of Learning**

Written formative and summative assessments.

- Collaborate effectively with peers to design renovation to an existing commercial facility according to applicable building codes and regulations
- Collaborate effectively with peers to design a viable small commercial building that meets identified code and ordinance requirements
- Use Low Impact Development principals to design a site that support a commercial facility
- Document the design or renovation of a commercial facility with construction drawings and a 3D computer model, using 3D architectural software
- Design a sewer lateral

**Pacing for Unit**

29 Classes

**Integration of Technology**

Tools and Software

- Building Design Software - Use of a 3D program (Autodesk Revit) to complete architectural design
- Structural Analysis Tool - MDSolids
- Survey equipment - Autolevel
- Budgeting and Project Management

**Family Overview and Unit Description**

This unit will provide students with an opportunity to discover the diversity and complexity of commercial building design as they design a renovation to a commercial facility. The design of commercial facilities includes multiple building systems and involves a wide range of engineering and architectural considerations. In this unit students will learn about site considerations important to the function of the building. Students will learn about common built-up systems that provide the building envelope such as wall and roofs. They will learn about the utilities and services that supply power, water, and communication services to the building. In addition students will learn about common structural systems employed to support all of the building components. Applying the knowledge they gain from this unit of study, students will design a renovation to a commercial facility and document that design using 3D architectural software.

Lesson 3.1 Commercial Building Systems

In this lesson students will be exposed to the design and development of commercial facilities and the building codes and land development regulations that impact commercial construction. Students are presented with a commercial renovation design project on which they will work throughout this unit. They will research building codes and land development regulations and learn about a variety of commercial wall, roof, and floor framing systems as they further develop a common vocabulary related to building design and development. Students continue to build expertise in the use of a 3D architectural design software package as they model and document their commercial design project ideas.

Lesson 3.2 Structures

This lesson is designed to introduce students to the concepts and principles of structural engineering and structural efficiency. The activities related to this lesson are designed to aid students in learning about the variety of forces that impact the design and performance of a building and how to quantify those loads using building codes and the physical characteristics of the structure. Students are also introduced to the physical laws and mathematics involved in determining the internal resistive forces generated by the imposed loads as the loads are transferred through the structural elements of the building into the ground. A variety of structural systems and common commercial foundation systems are presented, and the lesson focuses on the analysis and design of beams and spread footings.

Lesson 3.3 Services and Utilities

This lesson will introduce students to the multiple modern utilities and services required in order for a building to function effectively and lawfully in today's society. These utilities and services include a reliable supply of energy and water, a system to dispose of wastes, and capacity for communication via multiple modes. Students will identify typical utilities and services for commercial buildings and common methods for distribution and measuring of those services. They will interpret and apply building code requirements and consider other physical constraints in the design and location of new utility service connections for their commercial project. In addition students will interpret and apply energy code requirements in the design of their commercial project building envelope and internal utility distribution systems in an effort to conserve natural resources, reduce operating costs, and protect the environment from the negative impact of development.

Lesson 3.4 Site Considerations

In this lesson students will learn about the important factors to be considered in commercial site design. They will perform a land survey, conduct a soil analysis, and conduct a physical investigation of the site in order to gather information relevant to their commercial project design. Students will use the information they have collected to design and document appropriate site improvements to provide adequate parking based on facility use and building code requirements and provide safe vehicular and pedestrian traffic access and flow. The site must also provide handicap access and provide access for emergency vehicles and the movement of goods and waste. Students will also become familiar with the requirements related to storm water runoff and management and learn the calculations necessary to comply with building codes. Based on the information they acquire during this lesson, students will design and document a site design for their commercial project. Their design will utilize low impact development techniques in order to incur minimal impact on people and the environment.

(Source: PLTW Civil Engineering Course Outline)

| **Unit-Specific Vocabulary** | | **Aligned Unit Materials, Resources, and Technology (beyond core resources)** |
|---|---|---|
| Brownfields<br>Constraints<br>Ethical<br>Municipality<br>Compliance<br>Ordinances<br>Regulations<br>Occupant load<br>Zoning | Curtain Wall<br>Structural Engineer<br>Structural Efficiency<br>Tension<br>Compression<br>Shear force<br>Moment<br>Free Body Diagram | N/A |

| **Opportunities for Interdisciplinary Connections** | **Anticipated Misconceptions** |
| --- | --- |
| • Students will use their English language skills in the development of presentations.<br>• Math - Measurement and scale are applied in creating accurate models, drawings, and plans.<br>• Math - Students will rearrange beam deflection formulas as well as use beam deflection short cuts.<br>• Social Studies - Students will utilize green design in their model home thus comparing and contrasting buildings. By doing such, students can compare and contrast modern roofs to roof designs from other time periods<br>• Art - Architectural aesthetics rely on principles of art and design such as balance, proportion, rhythm, and unity.<br>• Physics - Civil engineers and architects take the theoretical physics concept of thermal resistance and standardize it into the practical, additive R-value metric for use in real-world infrastructure designs. | Scale & Complexity<br>Commercial construction is just a larger version of residential; they underestimate the massive differences in fire suppression systems, structural steel/concrete design, and commercial HVAC/plumbing systems.<br>Regulations (Zoning vs. Code)<br>Zoning/Land Use regulations are the same as Building Codes. Students may confuse what the land can be used for (zoning) with how the building on that land must be built (code).<br>Structural Design<br>Structural stability is achieved simply by making components thicker or bigger, neglecting the concept of structural efficiency and the importance of beam shape (e.g., I-beams) and material properties.<br>"Form Follows Function"<br>This principle means a building should be boring or strictly utilitarian. They miss that it means the building's aesthetic and form must be justified by its purpose and not decorative alone. |
| **Connections to Prior Units** | **Connections to Future Units** |
| This unit builds on the students prior knowledge of Autodesk Revit as well as adds new components such as beam deflection and structural engineering. | Students will continue to use many of the techniques and information they have gained for Unit 4. |

**Differentiation through *Universal Design for Learning***
**Teacher Actions to Provide Differentiated Support**

Learning Target 1: I can understand the difference between land use regulations and building code requirements.

- Activate or supply background knowledge: Build on what students already know about community rules and safety.
- Clarify vocabulary and symbols: Clarify complex terminology like "zoning," "setback," and "code."
- Optimize relevance, value, and authenticity: Connect codes and regulations to real-life construction and neighborhood planning.

Learning Target 2: I can compare and contrast the influence of land use regulations and building codes on the design and construction process.

- Highlight patterns, critical features, big ideas, and relationships: Use a Venn Diagram or a two-column chart to visually separate the scope of Land Use Regulations (e.g., where you can build, how big the lot coverage is) from Building Codes (e.g., how you must build for safety, such as stair height and fire rating).
- Clarify vocabulary and symbols: Clearly define and contrast terms such as "Zoning" (Land Use) versus "Structural Integrity" (Building Code) to establish distinct conceptual boundaries for students.
- Guide information processing, visualization, and manipulation: Provide before-and-after scenarios of a building design, illustrating how a change in a setback requirement (Land Use) affects the building footprint versus how a change in insulation R-value (Building Code) affects the wall assembly.

Learning Target 3: I can understand the difference between residential construction and commercial construction.

- Highlight patterns, critical features, big ideas, and relationships: Compare size, materials, and design purpose of different construction types.
- Illustrate through multiple media: Use visuals, diagrams, or real-world examples to highlight differences.
- Optimize relevance, value, and authenticity: Relate learning to real projects and career roles in construction.

Learning Target 4: I can understand building codes and why they are important in construction of properties.

- Activate or supply background knowledge: Connect to safety and community standards students already know.
- Optimize relevance, value, and authenticity: Show how codes protect people and ensure safe, functional buildings.
- Highlight patterns, critical features, big ideas, and relationships: Explain how codes influence every part of a design.

Learning Target 5: I can describe what cross-sectional shape provides the strongest beam.

- Illustrate through multiple media: Use visual models or 3D simulations to show beam strength.
- Guide information processing, visualization, and manipulation: Help students interpret structural diagrams and analyze forces.
- Use multiple tools for construction and composition: Let students test and model beams physically or digitally.

Learning Target 6: I can explain how the design of the utility systems for a building affect the overall design of the building.

- Highlight big ideas and relationships: Show how plumbing, HVAC, and electrical systems connect to structure and layout.
- Illustrate through multiple media: Use diagrams, schematics, or modeling tools.
- Foster collaboration and community: Encourage teamwork to plan integrated systems.

Learning Target 7: I can describe three differences in how residential building project design differs from commercial building project design.

- Highlight patterns, critical features, big ideas, and relationships: Use comparison charts or visuals to emphasize key differences.
- Illustrate through multiple media: Support understanding with photos, blueprints, or video tours.
- Optimize relevance, value, and authenticity: Relate designs to real-world construction and careers

Learning Target 8: I can explain how differential surveying is used by a typical homeowner to provide better results for home improvement projects.

- Optimize relevance, value, and authenticity: Connect surveying to real homeowner tasks and real-world applications.
- Activate or supply background knowledge: Link to familiar tasks like leveling or measuring slopes.
- Build fluencies with graduated levels of support for practice and performance: Scaffold learning through guided practice and hands-on activities.

**Supporting Multilingual/English Learners**
**Related CELP standards aligned to Learning Targets**

| | Emerging | Bridging | Expanding |
|---|---|---|---|
| **LT1** | I can tell if a rule is about where a building goes (land use) or how a building is made (building code). | I can describe that land use rules are about location and purpose and building codes are about safety and construction. | I can differentiate between land use regulations (zoning, density, aesthetics) and building code requirements (safety, structural, fire) and their respective jurisdictions. |
| **LT2** | I can identify that rules (codes/regulations) change what a designer can do and how a builder works. | I can explain how both land use rules and building codes limit or guide the design, from the size of the lot to the strength of the walls. | I can compare and contrast the specific ways that land use regulations (site placement, form) and building codes (material choice, structural design) influence the entire design and construction process. |
| **LT3** | I can match a house design to residential and a store design to commercial. | I can state that residential is for living and commercial is for business, and they use different materials or rules. | I can distinguish the core differences between residential construction (e.g., scale, complexity of systems, ownership structure) and commercial construction (e.g., specialized use, high occupancy codes). |
| **LT4** | I can name one thing a building code makes sure is safe (e.g., fire safety, strong walls). | I can explain why building codes are important—they ensure properties are safe for people and strong against damage. | I can analyze the essential role of building codes in protecting public health, ensuring structural integrity, and establishing minimum acceptable standards for property construction. |
| **LT5** | I can point to the shape that makes the strongest beam (I-beam). | I can describe the I-beam shape and explain that its design puts material where it is needed most to resist bending forces. | I can articulate why the I-beam cross-sectional shape provides superior strength and efficiency for structural beams compared to other shapes due to its ability to maximize the moment of inertia. |
| **LT6** | I can identify the pipe/wire locations and say that the utility systems (water, electric) change where walls or bathrooms must be. | I can explain how the need for space, pipes, and vents for utility systems (HVAC, plumbing) limits or guides where the designer can place rooms and structural elements. | I can evaluate the interdependent relationship between a building's utility system design (HVAC, electrical, plumbing) and the overall architectural design, including space allocation, vertical chases, and system access. |
| **LT7** | I can state three simple ways a house design is different from a store design (e.g., cost, number of bathrooms, building height). | I can describe three specific ways that residential design differs from commercial design (e.g., regulatory focus, budget scale, complexity of mechanical systems). | I can compare and contrast at least three significant differences between the design processes for residential and commercial projects, such as code compliance focus, program complexity, |

| | | | |
|---|---|---|---|
| | | | or budget constraints. |
| **LT8** | I can identify that surveying measures land height and that the information helps a homeowner plan (e.g., where water will flow). | I can explain that a homeowner uses differential surveying to find the precise height differences on their property to better plan projects like drainage or grading. | I can describe and justify how a typical homeowner can utilize the precise elevation data provided by differential surveying to optimize planning and execution for effective home improvement projects (e.g., proper slope for drainage). |

| Lesson | Learning Target | Success Criteria/ Assessment |
|---|---|---|
| Lesson 1<br>*Commercial Building Systems* | LT 1: I can understand the difference between land use regulations and building code requirements. | • I can define land use regulations as rules that control how land can be used (for example, zoning laws that separate residential, commercial, and industrial areas).<br>• I can explain that land use regulations focus on planning and development of land within a community. |
| | LT 2: I can compare and contrast the influence of land use regulations and building codes on the design and construction process. | • I can define the purpose of land use regulations and provide examples of how they impact a building project.<br>• I can define the purpose of building codes and provide examples of how they impact a building project.<br>• I can explain how land use regulations primarily affect the "where" and "what type" of structure is built.<br>• I can explain how building codes primarily affect the "how" a structure is built safely and effectively.<br>• I can accurately compare and contrast the distinct roles of both land use regulations and building codes in the overall design and construction process. |
| | LT 3: I can understand the difference between residential construction and commercial construction | • I can define residential construction as building structures meant for people to live in, such as houses, apartments, and townhomes.<br>• I can define commercial construction as building structures meant for businesses or public use, such as offices, schools, hospitals, and stores.<br>• I can explain how budget, timeline, and materials differ between residential and commercial projects. |
| | LT 4: I can understand building codes and why they are important in construction of properties. | • I can define building codes as official regulations that set minimum standards for design, construction, and safety of buildings.<br>• I understand that building codes are created and enforced by local, state, and national authorities to protect people and property.<br>• I can explain that building codes exist to:<br>  ○ Ensure safety for occupants (e.g., fire protection, structural strength, electrical safety).<br>  ○ Promote accessibility for all users, including those with disabilities.<br>  ○ Support public health and welfare through sanitation, ventilation, and energy standards.<br>  ○ Provide consistency in construction practices. |
| Lesson 3.2<br>*Structures* | LT 5: I can describe what cross-sectional shape provides the strongest beam. | • I can define what a beam is — a structural element that supports loads by resisting bending.<br>• I can explain what cross-sectional shape means — the shape of a beam's cut surface when viewed from the end.<br>• I can identify that the I-beam (or H-beam) is one of the strongest cross-sectional shapes used in construction.<br>• I can describe that this shape is strong because it places material farthest from the center (neutral axis), where it resists bending the most. |
| Lesson 3.3<br>*Services and Utilities* | LT 6: I can explain how the design of the utility systems for a building affect the overall design of the building. | • I can define utility systems as the essential building systems that provide water, electricity, heating, cooling, and waste removal. |

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| | | ● I can identify the main utility systems in a building:<br>○ Plumbing (water supply and waste)<br>○ Electrical (power and lighting)<br>○ HVAC (heating, ventilation, air conditioning)<br>○ Communication and fire protection systems<br>● I can explain that utility systems influence the layout and structure of a building.<br>● I understand that utilities must be planned early in the design process to avoid conflicts with walls, ceilings, and structural supports. |
| Lesson 3.4<br>*Site Considerations* | LT 7: I can describe three differences on how residential building project design differs from commercial building project design. | ● I can define what residential building design means (homes, apartments, places where people live).<br>● I can define what commercial building design means (offices, schools, stores, factories, or other buildings used for business or public use).<br>● I can identify at least three clear differences between residential and commercial design, such as:<br>○ Purpose and Function: Residential designs focus on comfort and livability, while commercial designs focus on efficiency and capacity for work or service.<br>○ Building Codes and Safety: Commercial buildings follow stricter fire, accessibility, and structural codes due to higher occupancy.<br>○ Materials and Structure: Commercial buildings often use steel and concrete for strength and height; residential projects use wood framing.<br>○ Utility Systems: Commercial designs require larger-scale HVAC, electrical, and plumbing systems to serve more people.<br>○ Aesthetics and Layout: Residential designs emphasize personal style and privacy; commercial designs prioritize public spaces and accessibility. |
| | LT 8: I can explain how differential surveying is used by a typical homeowner to provide better results for home improvement projects. | ● I can define differential surveying as a method used to measure differences in elevation between points to determine accurate height and slope information.<br>● I can explain the purpose of differential surveying — to ensure level, accurate, and properly graded surfaces for construction or landscaping projects.<br>● I can identify at least two home improvement projects where differential surveying is useful, such as:<br>○ Installing a patio, deck, or driveway that must be level or properly sloped for drainage.<br>○ Landscaping or yard grading to prevent water pooling near the house.<br>○ Adding an addition or building a shed that needs a level foundation. |

| **Unit Title** | |
|---|---|
| Unit 4: Commercial Building Design Problem | |
| **Relevant Standards** | |
| [PLTW Civil Eng & Arch Standards Alignment]<br>• Common Core State Standards for English Language Standards (Page 2)<br>• Common Core State Standards for Mathematics (Page 6)<br>• Next Generation Science Standards (Page 13)<br>• Standards for Technological and Engineering Literacy (Page 19) | |
| **Essential Questions** | **Enduring Understandings** |
| Lesson 1<br>• If you had to describe one strategy that would most help an architect/engineer to be a good and effective building project designer, what would it be?<br>• Stephen Covey includes "Begin with the End in Mind" as one of the seven habits listed in his book, The 7 Habits of Highly Effective People. How can this habit make an engineer/architect more effective?<br>Lesson 2<br>• How important is it to an architect's or civil engineer's success that s/he possesses "people skills"? | • Effective architects and engineers integrate technical knowledge, creativity, communication, and problem-solving strategies to design safe, functional, and aesthetically pleasing structures. A successful designer continuously refines their process to balance client needs, environmental constraints, and construction feasibility.<br>• Clear vision and purposeful planning are essential to the design process. Architects and engineers who "begin with the end in mind" are more effective because they anticipate project goals, user needs, and long-term impacts — allowing them to make intentional design decisions that align with the desired outcome.<br>• Strong interpersonal and communication skills are critical for architects and engineers, as collaboration, negotiation, and teamwork are vital to the design and construction process. Technical expertise alone is not enough; understanding and managing relationships with clients, contractors, and team members ensures project success and professional growth. |
| **Demonstration of Learning** | **Pacing for Unit** |
| Written formative and summative assessments.<br>• Analyze a given building/site design and make recommendations to identify errors and/or omissions improve energy efficiency reduce the quantity and/or improve the quality of storm water runoff | 24 Classes<br>**Integration of Technology**<br>Tools and Software<br>• Building Design Software - Use of a 3D program (Autodesk Revit) to complete architectural design<br>• Structural Analysis Tool - MDSolids<br>• Survey equipment - Autolevel<br>• Budgeting and Project Management |
| **Family Overview and Unit Description** | |
| This unit will allow students to collaborate on the design and documentation of a small commercial facility within a project design team. They will identify a need within their community, investigate a potential site, develop a preliminary design, and document the design of the facility as a team. They will also present their design concept to a panel that will critique their design and offer feedback to the team related to their design and presentation.<br><br><u>Lesson 4.1 Commercial Design Problem</u><br>In this lesson students will work within design teams to develop a preliminary design for a small commercial facility. As part of the design process, they will investigate a potential site for development of their commercial project; research codes, zoning ordinance, and regulations that impact the site; and determine the legal description of the property. Students will develop an architectural program to describe the desired outcome of the project and help guide development. They will become familiar with legal, physical, and financial conditions that should be considered in order to determine the viability of project development and help determine whether a project solution should be undertaken. As the team project progresses, students will apply the skills and knowledge they have gained throughout the course to the team commercial project. They will learn new skills related to team design work, including creating a project organization chart, developing and using a Gantt chart to plan and monitor project progress, and holding regular team meetings. Students will document their design according to accepted practice using 3D architectural modeling software.<br><br><u>Lesson 4.2 Commercial Design Presentation</u><br>In this lesson students will create and deliver a formal presentation (both oral and written) of their final team | |

commercial design project to include a description of both the design process (and justifications of design decisions) as well as the resulting design. The project presentation will be reviewed and critiqued by a panel who will offer feedback to the team related to their design process, decision making, and the resulting design and documentation.

(Source: PLTW Civil Engineering Course Outline)

| **Unit-Specific Vocabulary** | | **Aligned Unit Materials, Resources, and Technology (beyond core resources)** |
|---|---|---|
| Sustainability<br>Legal Description<br>Site Discovery<br>Building Codes<br>Zoning Codes<br>ADA Requirements<br>Occupancy Load<br>Egress<br>Rendering | Principal Meridian<br>Metes and Bounds<br>Plat<br>Municipal Ordinances<br>Municode<br>Frontage<br>Feasibility<br>Gantt Chart | N/A |

| **Opportunities for Interdisciplinary Connections** | **Anticipated Misconceptions** |
|---|---|
| • Students will use their English language skills in the development of presentations.<br>• Math - Measurement and scale are applied in creating accurate models, drawings, and plans.<br>• Math - Students will rearrange beam deflection formulas as well as use beam deflection short cuts.<br>• Social Studies - Students will utilize green design in their model home thus comparing and contrasting buildings. By doing such, students can compare and contrast modern roofs to roof designs from other time periods.<br>• Art - Architectural aesthetics rely on principles of art and design such as balance, proportion, rhythm, and unity. | Site Analysis/Surveying<br>Differential surveying is unnecessary if an area looks flat, or that fences or visible property markers accurately define legal property lines.<br>Stormwater Management<br>Drainage is a simple problem solved by putting in a single drain or French drain. They overlook the need for holistic stormwater plans, managing runoff volume, and using techniques like permeable pavement or rain gardens.<br>Ethics and Environment<br>"Touching the earth lightly" only applies to visible landscaping, missing the impact of foundation work, utility trenching, and construction waste on the site ecology.<br>Project Management<br>A project is finished once the design drawings are done. They fail to account for the crucial role of the engineer/architect during construction administration, bidding, and addressing site problems. |
| **Connections to Prior Units** | **Connections to Future Units** |
| Builds upon the use of Autodesk Revit for building design | N/A |

**Differentiation through *Universal Design for Learning***
**Teacher Actions to Provide Differentiated Support**

Learning Target 1: I can analyze a potential site for a commercial project and explain how building codes and regulations affect what can be built.

- Provide visual aids, diagrams, or maps of building codes and zoning.
- Allow students to present findings in writing, verbally, or visually.
- Offer real-world examples to increase relevance and engagement.

Learning Target 2: I can design a commercial building and create a complete project portfolio that communicates my design clearly.

- Use modeling software, drawings, or physical models.
- Allow portfolios in multiple formats: digital, printed, or video.
- Provide choice in design topics or building types to enhance engagement.

Learning Target 3: I can evaluate how a commercial building project affects people and the environment, and explain how design choices can make it more sustainable and ethical.

- Provide case studies, videos, or infographics on sustainability.
- Encourage reflection through discussion, journals, or presentations.
- Offer collaborative group work to increase engagement and relevance.

Learning Target 4: I can research and interpret legal descriptions of property using online resources and historical documents.

- Offer tutorials for online databases and historical document access.
- Provide graphic organizers to map out legal descriptions.
- Allow verbal explanations or annotated diagrams to demonstrate understanding.

Learning Target 5: I can sketch a plat based on legal descriptions using the rectangular survey system and metes and bounds.

- Provide step-by-step instructions and sample sketches.
- Allow use of digital drawing tools or physical paper.
- Scaffold the task with guided examples to build confidence.

Learning Target 6: I can understand the significance of recording complete legal descriptions with local courts and the methods used.

- Use diagrams, flowcharts, or videos to illustrate recording processes.
- Allow written, verbal, or visual explanations of the process.
- Connect tasks to real-life relevance to enhance engagement.

Learning Target 7: I can identify the key site characteristics that influence the suitability for a proposed development.

- Provide photos, maps, or 3D site models.
- Encourage students to create checklists or charts to organize data.
- Allow students to choose a site of interest for analysis.

Learning Target 8: I can research and document various site conditions using a Site Discovery Checklist.

- Provide digital or printable checklists with guiding prompts.
- Allow documentation through photos, diagrams, or written notes.
- Scaffold the process by demonstrating examples of completed checklists.

Learning Target 9: I can evaluate the impact of environmental, zoning, and adjacent property considerations on site development.

- Provide visual case studies or GIS maps.
- Allow students to present their evaluation verbally, in writing, or through diagrams.
- Encourage peer discussion to enhance engagement.

Learning Target 10: I can compare several commercial development options to determine the most viable project for a site.

- Use charts or tables to organize comparisons.
- Allow students to present options visually, verbally, or digitally.
- Scaffold criteria for comparison to support decision-making.

Learning Target 11: I can evaluate the legal, physical, and financial feasibility of proposed development options.

- Provide checklists or templates for feasibility analysis.
- Allow flexible expression: reports, presentations, or interactive models.
- Incorporate real-world scenarios to motivate learning.

Learning Target 12: I can use a decision matrix to make comparisons based on gathered data.

- Provide sample decision matrices and guided steps.
- Allow digital, paper, or visual representations of the matrix.
- Encourage collaborative completion for engagement and feedback.

Learning Target 13: I can collaborate on the purpose, materials, and techniques for creating a model of a commercial design solution.

- Offer multiple materials (digital, physical) for modeling.
- Encourage peer discussion and shared planning.
- Provide visual or written guides for construction techniques.

Learning Target 14: I can construct a scaled model that accurately represents key aspects of a commercial design solution.

- Provide scaffolding with templates or measurement guides.
- Allow students to use physical or digital models.
- Offer opportunities for iterative feedback to support mastery.

Learning Target 15: I can prepare visual aids and a presentation to effectively communicate the final commercial design solution.

- Provide multiple formats for visual aids (slides, posters, 3D models).
- Allow oral, video, or written presentations.
- Scaffold presentation structure and provide rubrics for guidance.

**Supporting Multilingual/English Learners**
**Related *CELP standards* aligned to Learning Targets**

| | Emerging | Bridging | Expanding |
|---|---|---|---|
| **LT1** | I can identify one rule (code or regulation) that changes what kind of store can be built on a map. | I can describe with simple phrases how site rules (zoning) and construction rules (codes) affect the size or type of building a company can make there. | I can analyze a potential site, referencing specific building codes and zoning regulations, to explain their complex influence on the feasibility and parameters of a commercial project. |
| **LT2** | I can draw a simple floor plan of a commercial building and label the rooms. | I can create a simple folder with my commercial design sketch and list the main materials and purpose. | I can design a commercial building and compile a comprehensive, well-organized project portfolio that clearly and professionally communicates all facets of the design solution. |
| **LT3** | I can name one way the building affects people (e.g., job) and one way it's good for the Earth (e.g., less trash). | I can explain with detail how commercial design choices (e.g., green roof, local materials) can make a project more sustainable and better for the community and environment. | I can evaluate the full socio-economic and environmental impact of a commercial project and propose/justify advanced, ethical design strategies to enhance its sustainability and community benefit. |
| **LT4** | I can find the name of the owner of a property using an online map or document. | I can use online resources to locate a property's legal document and identify key facts like the lot number or property lines. | I can research and accurately interpret complex legal descriptions of property (e.g., lot and block, metes and bounds) using specialized online resources and historical public documents. |
| **LT5** | I can draw a simple square or rectangle to show a piece of land from a simple description. | I can sketch a basic plat map (drawing of land) using given rectangular survey information (e.g., section, township) or simple directions (metes and bounds). | I can accurately sketch and label a plat map based on both the Rectangular Survey System and metes and bounds descriptions, demonstrating comprehension of surveying terminology. |
| **LT6** | I can say that property maps must be kept at the local office so everyone knows who owns what. | I can explain that recording legal descriptions is important because it creates a public record of ownership, which prevents future disputes. | I can evaluate the legal and financial significance of recording complete legal descriptions with local courts and describe the specific methods and documentation required for this process. |
| **LT7** | I can name three things about the land that change what we can build (e.g., water/river, road access, slope). | I can identify the key site characteristics (e.g., topography, utility access, soil type) and explain why each influences the feasibility of building a new project. | I can systematically identify and prioritize the key physical and logistical site characteristics (e.g., geotechnical conditions, infrastructure availability, legal easements) that critically influence development suitability. |
| **LT8** | I can look at a picture of a site and check off if it has a road, trees, or water on a list. | I can use a checklist to document basic observations about the current site conditions, like nearby roads, zoning use, and environmental features. | I can research and thoroughly document various site conditions using a structured Site Discovery Checklist, synthesizing data from multiple sources (maps, surveys, site visits). |
| **LT9** | I can say that building near a house (adjacent property) or a park (environmental) can cause problems. | I can explain how nearby homes (adjacent property), environmental rules, and zoning all affect where we can build and how big the building can be. | I can evaluate and articulate the complex impact of environmental constraints, zoning ordinances, and adjacent property considerations on design decisions and the overall viability of site development. |
| **LT10** | I can choose the best project (e.g., hotel, store) for a piece of land from two simple options. | I can compare a few commercial project options for a site by listing the pros and cons for each one. | I can compare and critically analyze several commercial development options (e.g., office park vs. retail center) against site data to determine the most financially and environmentally viable project. |

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| **LT11** | I can say if a project is possible (physical) and if we have enough money (financial). | I can evaluate a proposed project's feasibility by describing its legal compliance, physical ability to be built, and if it is affordable (financial). | I can comprehensively evaluate the legal, physical, and financial feasibility of proposed development options, integrating data on zoning, site constraints, and projected return on investment. |
| **LT12** | I can put check marks on a simple table (matrix) to show which option is better based on a few facts. | I can use a decision matrix by assigning scores to criteria (e.g., cost, size, traffic impact) to compare development options and identify the best choice. | I can effectively utilize a weighted decision matrix to systematically make data-driven comparisons between complex options based on gathered site and feasibility data. |
| **LT13** | I can say what the model will show and point to the materials we will use to build it. | I can work with my group to decide what the model's main focus is and select appropriate materials and simple building techniques. | I can collaboratively determine and articulate the precise purpose, material selection, and sophisticated construction techniques necessary for accurately representing a commercial design solution in a scaled model. |
| **LT14** | I can cut and glue simple shapes to help build a part of the scaled model. | I can construct a scaled model following a plan, making sure the main elements (e.g., building, parking lot) are accurate in size and location. | I can independently construct a meticulously scaled model that accurately represents the structural, spatial, and aesthetic aspects of the final commercial design solution. |
| **LT15** | I can hold up a drawing and read one short sentence about my building during the presentation. | I can create simple visual aids (e.g., poster, slide with pictures) and present the main ideas of my final design solution to the class. | I can prepare and utilize professional-quality visual aids and deliver a compelling, well-structured presentation to effectively communicate the final commercial design solution and its rationale. |

| Lesson | Learning Target | Success Criteria/ Assessment |
|---|---|---|
| Lesson 4.1<br>*Commercial Building Design Problem* | LT 1: I can analyze a potential site for a commercial project and explain how building codes and regulations affect what can be built. | • I can identify zoning laws, land use restrictions, and other site-specific regulations.<br>• I can explain how building codes (structural, safety, accessibility, fire) impact the design possibilities.<br>• I can evaluate site features (topography, utilities, access) in relation to regulations.<br>• I can justify whether the site is suitable for the proposed commercial project. |
| | LT 2: I can design a commercial building and create a complete project portfolio that communicates my design clearly. | • I can produce accurate site plans, floor plans, elevations, and sections.<br>• I can include materials, construction methods, and specifications in the portfolio.<br>• I can organize the portfolio in a logical, professional way.<br>• I can clearly communicate design ideas through drawings, diagrams, and written explanations. |
| | LT 3: I can evaluate how a commercial building project affects people and the environment, and explain how design choices can make it more sustainable and ethical. | • I can identify environmental impacts such as energy use, waste, and ecological effects.<br>I can suggest sustainable design choices (energy efficiency, renewable resources, green materials).<br>• I can assess social and ethical considerations (safety, accessibility, community impact).<br>• I can explain how specific design choices improve sustainability and ethical outcomes. |
| | LT 4: I can research and interpret legal descriptions of property using online resources and historical documents. | • I can locate property records from reliable online databases or archives.<br>• I can read and interpret legal descriptions, including lot, block, and subdivision information.<br>• I can explain key terms used in legal property descriptions (e.g., metes and bounds, township, range). |

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| | | • I can summarize property boundaries and features accurately from the documents. |
| | LT 5: I can sketch a plat based on legal descriptions using the rectangular survey system and metes and bounds. | • I can identify and apply the rectangular survey system (township, range, section) to map property.<br>• I can interpret metes and bounds descriptions to determine boundary lines.<br>• I can draw an accurate plat that represents property dimensions and relationships.<br>• I can label key features, boundaries, and reference points clearly on the plat. |
| | LT 6: I can understand the significance of recording complete legal descriptions with local courts and the methods used. | • I can explain why accurate legal descriptions are required for property ownership and transactions.<br>• I can describe the process for recording property with local courts or registries.<br>• I can identify consequences of incomplete or incorrect legal descriptions.<br>• I can provide examples of proper recording methods and documentation. |
| | LT 7: I can identify the key site characteristics that influence the suitability for a proposed development. | • I can recognize physical characteristics such as topography, soil type, and drainage.<br>• I can identify access points, utilities, and existing infrastructure on the site.<br>• I can explain how these characteristics affect potential development options. |
| | LT 8: I can research and document various site conditions using a Site Discovery Checklist. | • I can gather information about the site from maps, surveys, and online resources.<br>• I can complete a Site Discovery Checklist accurately, noting important details about the site.<br>• I can organize and present the collected data clearly for analysis. |
| | LT 9: I can evaluate the impact of environmental, zoning, and adjacent property considerations on site development. | • I can identify zoning regulations and land-use restrictions affecting the site.<br>• I can assess environmental factors such as wetlands, flood zones, or protected habitats.<br>I can analyze how neighboring properties or land uses might influence the project.<br>• I can provide reasoned conclusions on whether the site is suitable for the proposed development. |
| | LT 10: I can compare several commercial development options to determine the most viable project for a site. | • I can identify multiple possible development options for a given site.<br>• I can describe the strengths and weaknesses of each option.<br>• I can justify which option is most viable based on site conditions and project goals. |
| | LT 11: I can evaluate the legal, physical, and financial feasibility of proposed development options. | • I can assess zoning, building codes, and other legal requirements for each option.<br>• I can evaluate physical site characteristics (topography, access, utilities) for feasibility.<br>• I can analyze financial factors such as construction costs, potential revenue, and return on investment.<br>• I can explain whether each option is feasible or not, and why. |
| | LT 12: I can use a decision matrix to make comparisons based on gathered data. | • I can identify relevant criteria (legal, physical, financial, environmental, etc.) for comparison.<br>• I can assign weights and scores to each criterion in a decision matrix.<br>• I can calculate total scores and rank options objectively.<br>• I can explain my choice of the best development option using the decision matrix results. |

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| Lesson 4.2 *Commercial Building Design Presentation* | LT 13: I can collaborate on the purpose, materials, and techniques for creating a model of a commercial design solution. | • I can explain the purpose of the model and what it is intended to communicate.<br>• I can identify appropriate materials and tools for constructing the model.<br>• I can discuss and select building techniques with team members to achieve accurate representation.<br>• I can contribute ideas and listen to others' suggestions during the planning process. |
| | LT 14: I can construct a scaled model that accurately represents key aspects of a commercial design solution. | • I can follow scale measurements to ensure accuracy in the model.<br>• I can build the model using appropriate materials and techniques.<br>• I can include key design features (floor plan, elevations, major structural elements)<br>• I can check and refine the model to ensure it accurately reflects the original design. |
| | LT 15: I can prepare visual aids and a presentation to effectively communicate the final commercial design solution. | • I can create clear and organized visual aids (drawings, renderings, diagrams) that highlight key design features.<br>• I can develop a structured presentation that communicates design ideas logically.<br>• I can explain the design solution clearly and respond to questions during the presentation.<br>• I can use visuals to support and enhance my oral explanation. |

**BRISTOL PUBLIC SCHOOLS**
**Bristol, Connecticut**

December 3, 2025
(**Meeting Date**)

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| | **Information Item** |
| X | **Decision Item** |

## AGENDA REPORTING FORM

**TOPIC:** Curriculum Revision: PLTW Civil Engineering and Architecture

**BACKGROUND:**
Civil Engineering and Architecture (CEA) is a high school level specialization course in the PLTW Engineering Program. In CEA students are introduced to important aspects of building and site design and development. They apply math, science, and standard engineering practices to design both residential and commercial projects and document their work using 3D architectural design software. Utilizing the activity-project-problem-based (APB) teaching and learning pedagogy, students will progress from completing structured activities to solving open-ended projects and problems that require them to develop planning, documentation, communication, and other professional skills.

Through both individual and collaborative team activities, projects, and problems, students will solve problems as they practice common design and development protocols such as project management and peer review. Students will develop skill in engineering calculations, technical representation and documentation of design solutions according to accepted technical standards, and use of current 3D architectural design and modeling software to represent and communicate solutions.

Building enthusiasm for and a real understanding of the role, impact, and practice of civil engineering and architecture as it relates to building design and development is a primary goal of the course.

(Source: PLTW Civil Engineering Course Resume and Course Outline)

**COST:** $3200 **FUNDING SOURCE:** General Budget

**RECOMMENDATIONS/COMMENTS:** The cost is for access to the PLTW curriculum for all PLTW courses that we offer. It is a mandatory program fee for the PLTW Engineering Pathway. This is not a new demand on the general budget; it is an annual cost that the Curriculum and Instructional Services department budgets for annually.

**ATTACHMENTS:**
PLTW Civil Engineering & Architecture CURRICULUM (2025-26).pdf

**TOPIC PRESENTER:** Laura Lanza, Secondary STEM Supervisor

**CONTACT NUMBER:** (860) 584-7074

**ACTING SUPERINTENDENT:** Iris White
Iris White

| Bristol Board of Education, Bristol CT | |
|---|---|
| Presented at Board Meeting: | |
| Approved: | |
| Order Filed: | |
| Referred to: | |

Nationally, school districts have different policies and procedures regarding student discipline. Some districts employ strict, punitive disciplinary procedures, maintaining a zero-tolerance policy for rule violations. Others apply a standard aimed at restoring the wronged party and addressing the behaviors involved. Over the years, student discipline policies have exhibited a disproportionately negative impact on students of color.

Moreover, school districts have been criticized for discipline policies that have yielded significantly higher percentages of rates of suspensions, expulsions, and school arrests among black and Latino students when compared to those of white students across the district's student population. This disparity has also been acknowledged by the federal government. A guidance jointly issued by the U.S. Department of Education and the U.S. Department of Justice informed public schools that they risk sanctions and/or lawsuits for violations of Title IV and Title VI of the Civil Rights Act of 1964 which prohibit discrimination on the basis of race, color, or national origin.

This narrative provides context for the Board's adoption of the mandated "Restorative Justice Policy." It discusses the rationale of the restorative justice response model and how it can reduce exclusionary discipline and provide equal access to education for all students. It reviews the model's characteristics as they relate to student discipline in public schools and some common misconceptions regarding implementation.

**Background and Rationale Behind the Restorative Justice Model**

Restorative practices, a system of corrective justice, focuses on the rehabilitation of offenders through reconciliation with victims and the community at large. Rather than punishing someone for a wrongful act, restorative justice uses mediation and agreement to correct the behavior of the offender and restore the wronged party. CABE's School Climate Policy 5131.911 defines restrictive practices. **"Restorative practices"** means evidence and research-based system-level practices that focus on (A) building high-quality, constructive relationships among the school community, (B) holding each student accountable for any challenging behavior, and (C) ensuring each such student has a role in repairing relationships and reintegrating into the school community.

Many school districts, beginning in the 1990s have utilized a form of zero tolerance as a model for student discipline. Zero tolerance policies contain an explicit, predetermined severe punishment for offenses. These policies typically targeting gang-related activity and drug offenses, remain fairly common. Many schools and districts also believe that zero-tolerance policies provide for fair and equal treatment of students because they remove background factors in assigning punishment. For example, a zero-tolerance policy for fighting in schools would theoretically affect all students fairly, regardless of background.

Over time, zero-tolerance policies became broader in scope, encompassing various other violations of school policy, including bullying, attendance, and insubordination. Research over the years indicates that a significant percentage of student suspensions and expulsions are for nonviolent, non-drug-related violations.

A result of zero tolerance policies in public schools has been shown to be a cause for an increase in the reported incidents of student discipline among students of color. Data from the U.S. Department of Education's Civil Rights Data Collection indicates that, nationally, black students account for nearly 40% of all students receiving at least one out-of-school suspension but only 15% of the total student population. In addition, black and Latino students account for over 50% of all school-related arrests, including referrals to law enforcement for conduct not related to criminal activity. These statistics and nationwide disparities have prompted school districts, legislators, and other interested parties to adopt restorative practices and determine the extent to which this approach will break this destructive pattern.

### The Role of Restorative Practice in Public Schools

Restorative practices strive to facilitate a nondiscriminatory and constructive student discipline system, replacing classroom suspensions for rule violations and other low-level altercations and offenses with opportunities for restoration to the harmed person. For some schools and districts, the implementation of alternative student discipline policies that allow schools to accomplish necessary educational goals is a primary and important mission. Federal data reveals significant racial disparities in student discipline, namely suspensions, which gives rise to concerns of racial discrimination that violate Title IV and Title VI and populating the "school to prison pipeline." The existence of such racial disparities invites students, teachers, and communities to question whether there are practices and systems, perhaps unconscious, of discrimination in a school's or district's policies and practices.

Restorative practices are believed to play a constructive role in addressing and improving students' academic performance in public schools. Studies have shown that high suspension rates negatively impact students' academic progress, which leads to lower test scores and higher dropout rates regardless of race or socioeconomic status. Students have a more difficult time learning when they are not in class. Other studies have shown a correlation between student suspensions or dropouts and criminal activity. Proponents of the restorative approach indicate that student discipline is handled constructively rather than punitively, which is an approach that is much more likely to keep students in school.

### What Restorative Practices in Public Schools Means

While the Model School Climate Policy defines restorative practices, school districts may vary in their implementation methods. Some utilize a three-tiered model for restorative practices that focus on prevention, intervention, and reentry.

Other school districts focus more of their resources on training counselors to adequately address conflicts after they have occurred. Some schools have students and faculty jointly involved in restorative practices committee hearings, whereas other schools have mostly teacher-led and faculty-led hearings. In short, restorative practice does not look the same in any two schools or districts across the country. However, constants exist within the schools and districts utilizing the model.

One aspect of restorative practice common to all schools is the facilitation of discussion between the student offender and the person harmed. A principle of restorative practices is to provide a space for the offender and the offended to talk through problems, address the underlying issues or behavior, and to make amends. When a student violates a rule or policy, they are brought before a committee consisting of their peers, faculty, or both, who explain the harm that was caused or could have resulted. Rather than questioning what rule was broken, who broke it, and what the rule breaker deserves as punishment, the discussion centers around the harm and the remedies. This conference also gives the student offender an opportunity to share what had occurred, motivations or extenuating circumstances.

In addition, the implementation of restorative practices in student discipline requires a level of time and resource commitment. Restorative practices committees and hearings take more time than the process required to suspend a student. An increase in time commitment for disciplinary proceedings may be more difficult for schools and districts with large populations, as it could leave less time and fewer resources for addressing other student needs. Districts without the necessary resources for restorative practices training also face challenges in implementation. Successful implementation requires teachers and administrators alike to buy into the concept of taking more time with individual offenses to prevent future violations. As the state is mandating districts to adopt a Restorative Practices policy and interventions reflective of the definition found in the model School Climate Policy, which also requires Board adoption, one can expect various training opportunities and resources for districts to follow.

Approved by its Board of Directors on March 31, 2017, the National Association of Community and Restorative Justice (NACRJ) developed a mission statement to promote policies and procedures that allow for restorative practices to be implemented in K-12 schools. In support of the policy positions, NACRJ calls for local and regional boards of education to adopt school or district-wide climate practices to foster caring relationships and discipline policies that employ social engagement over social control.

In addition, the policy statement calls for state education agencies to provide technical assistance and institutions of higher education to include the theory and practice of restorative processes in schools as part of teacher and school administrator licensure programs. These efforts should lead adults working with young people to adopt restorative practices for their own use, including building healthy relationships between each other and having policies in place to repair the harm that may occur with conflicts between and among adults involved in educational systems (NACRJ) Policy Statement on Restorative Practices in K-12 Education, National Association of Community Restorative Justice, San Antonio, Texas, 2017.

According to NACRJ, ten essential elements of the vision of school-wide restorative practices in K-12 education exist. They include:

- Prioritizing, nurturing, and maintaining healthy relationships;
- Empowering all school community members to make choices based on common values;
- Guiding educators to clarify their beliefs about children and issues of power;
- Understanding that challenging behaviors demonstrate a breakdown of relationships and unmet needs;

- Healing comes through reparation and support;
- Believing in your students and working together to support every student;
- Anticipating, monitoring, intervening, and addressing conflict, violence, mistreatment, bullying, and harassment of any kind;
- Initiating trauma-informed practices that prioritize relationships and promote healing;
- Ensuring curriculum and instructional materials reflect the diversity of students and how they learn;
- Making learning more fun and meaningful by employing relationship-based pedagogies.

Implementation guidelines center on five stages: Assessment and Exploration, Capacity Building, Planning, Initial and Full Implementation, and Evaluation.

**What Restorative Practices in Public Schools Does Not Mean**

Restorative practice does not mean that students who commit serious or criminal acts will receive a "pass" or some lesser punishment for their actions. Restorative mediation is seldom used in situations involving major offenses. This means that restorative practices are not appropriate as an option in situations involving gun or weapons possession, or violent sexual behavior, for example. Further, these offenses are controlled by federal and/or state statute and schools may have a legal responsibility for specified disciplinary actions. The majority of offenses that result in student suspensions, and thus the impetus for the restorative practices movement, have been for nonviolent, noncriminal offenses such as willful defiance and insubordination.

Additionally, its supporters indicate that restorative practices does not mean that teachers will lose the ability to "control" their classrooms. Some schools have been reluctant to adopt the restorative model because teachers fear losing command over the student disciplinary process. Teachers may share their concern over the loss of consequences for unruly students.

However, effective implementation of restorative practices in schools does not mean less control over classrooms for teachers. Instead, some teachers report having significantly better relationships with their students, as the students aren't afraid to come forward when they make a mistake because they know there is mutual respect between the teacher and class.

Moreover, restorative practices should not infringe upon the privacy rights of students. Restorative practices committees and hearings involving student and faculty committee members do present a student privacy concern. The federal Family Educational Rights and Privacy Act (FERPA) necessarily requires that the disclosure of a student's personally identifiable information (student discipline records count as such) be made with the written consent of that student or his or her parents. Students and faculty participating in the hearings must also sign nondisclosure agreements. In some school districts implementing this approach, students and parents have the option to opt out of restorative disciplinary hearings and pursue traditional disciplinary measures. Consultation with the Board attorney is an important step to ensuring these matters receive adequate legal consideration.

**Implementation: Where it Works, and Where it Needs Improvement**

The Oakland Unified School District (OUSD) in California was one of the first school districts to implement restorative practices in student discipline. OUSD has successfully cut down on suspension and expulsion rates and increased student rehabilitation since implementing the practice. The District's success is credited to the use of the three-tiered model of restorative justice. The three-tiered model focuses on prevention, intervention, and supported reentry. The prevention stage utilizes teachers, students, and the community to build and promote social and emotional skills that serve as an initial barrier to rule violations, conflict, or harmful and inappropriate behaviors.

The second tier, the intervention stage, focuses on addressing rule violations with the offender in a constructive, non-punitive manner. This stage helps the offender to understand the harm caused by their actions, while also helping the community to understand what motivated the student to act that way. The third stage, the supported reentry tier, assists the student in reintegrating into the school environment when they have been suspended or otherwise removed from classroom instruction in a way that sets the student up for success. OUSD's use of the three-tiered model includes a proactive circle with students and a restorative practices coordinator, as well as peer mediation and family group circles with student offenders.

OUSD has also experienced success in using restorative practices in the school disciplinary system due to the district's funding and support for its implementation. Oakland Unified School District had funding available to hire a restorative practices program director to oversee the training and application of the model in the district. However, even in schools with limited funding, restorative practices have still found success. In Pittsfield, New Hampshire, teachers researched programs in other school districts and created their own restorative practices program in a school of only 260 students.

The Los Angeles, California, district (LAUSD), however, had experienced difficulties in effective execution of the restorative practices discipline model. Here, as in other similarly situated school districts, a significant roadblock for LAUSD has been funding and allocation of resources directed towards this initiative.

As a cautionary tale, San Diego Unified School District (SUSD) had also run into resource issues and, as a result, had zero schools in the district operating beyond the beginning stages of a restorative practices program. Consequently, teachers complained that the lack of training, coupled with the absence of exclusionary punishments adversely affected their ability to control their classrooms. In some schools, in fact, the lack of proper resources for restorative practices in discipline has led teachers and administrators to turn to calling the police to handle disruptive students, an unintended and adverse consequence related to poor implementation.

**Conclusion**

Schools and school districts across the country have a legitimate interest in ensuring that their student disciplinary procedures function in a way that provides full and equal access to education, as well as a safe, friendly and respectful environment for all students. Restorative practices offer schools and districts a way to address student misconduct restoratively, reducing the number of suspensions that usually cost students valuable learning time while not addressing the harm and contributing factors of the challenging behaviors.

Increasingly school districts nationwide are adopting restorative practices in their student discipline models. Some districts have found success in implementation where there are sufficient resources available to facilitate training, a strong model for comprehensive reform, and a collective buy-in from faculty, students and the community.

**Policy Implications**

Public Act 23-167, Sections 47-55. 70-71 and 86-87 require boards to adopt and implement the new CT School Climate policy (CABE Policy #5131.911). In addition to this mandated policy, Public Act 23-167, Section 74 requires boards to adopt a "restorative practices response" policy by the 2025-26 school year. Drafted in January 2018, CABE developed a model policy for districts wishing to implement this practice. As this practice is now required and boards must adopt a policy, CABE's model policy 5144.12 has received extensive updating to coordinate with language and definitions in the CT School Climate policy and fulfill the requirements in the Public Act. Now a mandated policy, CABE's Restorative Practices Response policy, must be implemented by school employees for incidents of "challenging behavior" or student conflict that is nonviolent and does not constitute a crime. This policy cannot involve SROs or other law enforcement officers unless the behavior or conflict becomes violent or criminal.

Restorative practices is based on a philosophy that establishes principles that guide the response to conflict and harm. This approach's three main goals encompass accountability, community safety, and competency development. As applied to schools, this philosophy views misconduct as a violation against people and damaging to relationships in the school and throughout the community.

Schools may involve a wide range of people in the restorative practices process, including the victims, who are often teachers, school staff, bystanders, other students, and the school community. Schools can apply restorative practice principles to move beyond responding to violations of school rules or merely reacting to conflict.

Restorative practices emphasize values of empathy, respect, honesty, acceptance, responsibility and accountability. They can involve all types of students and provide opportunities to socialize students and teach them how to be productive members of society. The discipline process includes learning how to control impulses and honing social skills. Restorative practices also:

- Provide ways to effectively address behavior and other complex school issues.
- Offer a supportive environment that can improve learning.
- Improve safety by preventing future harm.
- Offer alternatives to suspension and expulsion.

Inclusion in the disciplinary process is a basic tenet of restorative practices. Students, as well as teachers and school staff, should be included as members of the school community. These disciplinary practices within schools have the potential to be more supportive, inclusive, and educational than other approaches. In reaching the goals of the restorative disciplinary approach, experts recommend:

- Creating caring climates to support healthy communities.
- Understanding the harm and developing empathy for both the harmed and the harmer.
- Listening and responding to the needs of the person harmed and the person who was harmed.
- Encouraging accountability and responsibility through personal reflection within a collaborative environment.
- Reintegrating the harmer into the community as a valuable, contributing member of society.
- Changing the system when it contributes to harm.

This approach can be implemented in varying degrees, from a single program to permeating school philosophy. Restorative practices programs in schools typically operate under formal guidelines and incorporate trained individuals to deal with conflict and violations of school rules. Such programs allow for the reparation of harm and have the potential to influence school climate and strengthen positive social connections between students and staff.

While restorative practices offer a promising alternative to traditional school disciplinary systems, considerable implementation challenges exist. Such challenges include finding the time and financial resources needed to train teachers and, over time, securing the support of a large number of school staff to sustain implementation.

While school boards are required to implement restorative practices and adopt policy, moving toward such an approach requires more fundamental change – changes in beliefs and how we interact. Therefore, the move towards a restorative approach is a comprehensive systems approach, one requiring training, commitment, more training, and more commitments. Fortunately, there are many resources available to districts

A required policy, #5144.12, "Student Discipline: Restorative Practices," and an administrative regulation have been developed and follow for consideration.

***Disciplinary Action***

*When any student is referred by any staff member for violation of school rules the following Restorative Plan will be followed:*

1. *Restorative measure represents a philosophy and a process that acknowledges that when a person does harm, it affects the persons they hurt, the community and themselves. When using restorative measures, an attempt is made to repair the harm caused by one person to another and to the community so that order is restored for everyone. By applying restorative measures in schools, school personnel have another tool to use with children and youth to repair harm and teach problem-solving skills.*
2. *Restorative practices guide teachers to teach children self-control through an understanding of personal needs, the use of problem-solving skills, and an expectation that children and adults can make amends-restitution-for the harm they cause.*
3. *An offending student is given the opportunity to participate in a restorative process to make things right for victims and the school community. Restorative approaches can be used in place of traditional discipline (detention, suspension, expulsion, etc....) or as a reentry tool upon exiting traditional disciplinary practices.*

**January 2018**
**Revised March 2024**

*A model policy to consider.* *(Required policy July 2025)*

# Students

## Challenging Behavior Prevention: Restorative Practices Response

### Introduction

Related to all matters of student discipline, the Board of Education requires district staff to make every effort to correct student challenging behavior through school-based resources and to support students in learning the skills necessary to enhance a positive school climate and avoid challenging behavior.

For most behaviors, schools should minimize the use of in-school and out-of-school suspensions, recommendations for expulsion, and referrals to law enforcement to the extent practicable while in compliance with state statutes, local ordinances, and mandatory reporting laws. It is the goal of the ______________ Public Schools and the Board of Education that the juvenile and criminal justice systems be utilized rarely to address all forms of challenging behavior.

All challenging behavior procedures and responses shall ensure due process and be enforced uniformly, fairly, consistently, and in a manner that does not discriminate on the basis of ethnicity, race, color, religion, national origin, ancestry, gender, sexual orientation, gender identity or expression, age, or disability.

For the school year beginning July 1, 2025, the __________________ Board of Education adopts this "Restorative Practices Response" policy to be implemented by school employees for incidents of challenging behavior or student conflict that is nonviolent and does not constitute a crime. This policy shall not include the involvement of school resource officers or other law enforcement officials unless the behavior or conflict becomes violent or criminal.

The Board of Education (Board) supports the District's fundamental mission to provide all students the opportunity to achieve academically and socially and emotionally, ethically, civically, and intellectually at the highest levels and to become a contributing and engaged citizen in our diverse society. All students should have the opportunity to develop their skills, knowledge, and competencies in a nurturing and accountable school setting. Schools play an important role in helping families and children make responsible decisions, cooperate with others, and have a successful life. Children, at times, find it difficult to manage their emotions and focus on their studies effectively. Developmentally appropriate social and emotional skills building allows students to cope with stress so they can access learning and develop into productive adults. Learning is a social activity, meaning children must be ready to learn by regulating their emotions and working constructively with others. Social and emotional learning (SEL) helps build a positive school climate by developing emotional intelligence through self-awareness, self-management, goal setting, social awareness, relationship building, collaborative skills, and responsible decision-making. Students should receive effective and engaging teaching, with curriculum, instruction, and assessment designed to address the needs of diverse learners.

## Students

**Challenging Behavior Prevention: Restorative Practices Response** (continued)

Restorative approaches recognize students' unique strengths, needs, and interests and present an opportunity for schools to develop a structure that utilizes practices that will create a more equitable path for all students. Utilizing restorative practices allows schools to embody more equitable approaches and meet students' short—and long-term needs.

The Board believes that all students have a right to attend schools that are safe and free from unnecessary disruption. Appropriate student behavior, reinforced by an effective system of discipline, is essential to creating and maintaining a positive school climate. This is the joint responsibility of students, staff, parents, and the community.

The Board requires District schools to implement restorative practices in response to conflict and harm. The "Restorative Practices Response" philosophy supported by the Board views misconduct as a violation against people and damaging to relationships in the school and throughout the community. The Board recognizes that schools may involve a wide range of people in the "Restorative Practices Response" process, voluntarily including victims, who are often teachers, school staff, bystanders, other students, and the school community.

**The four main goals of Restorative Practices Response are:**

1. **Relationship Building:** creating a school environment where everyone is safe, welcomed, supported, and included in all school-based activities and focuses on high-quality, constructive relationships among the school community members;
2. **Accountability:** Restorative Practices Response strategies hold each student accountable for any challenging behavior;
3. **Community Safety:** Restorative Practices recognize the need to keep the school community safe through strategies ensuring that all students have a role in repairing relationships affected by challenging behavior. In safe, supportive education environments students feel a sense of belonging and allow schools to challenge policies and procedures that prevent student growth;
4. **Competency Development:** Restorative Practices Response seeks to increase the social-emotional intelligence skills of those who have harmed others, address underlying factors that lead students to engage in the form of challenging behavior, and build on strengths.

**Definitions**

Through adopting the Connecticut School Climate Policy (5131.911), the Board endorses a "Restorative Practices Response" approach to student discipline. As defined in Policy 5131.911,

**Restorative Practices** mean evidence and research-based system-level practices that focus on (A) building high-quality, constructive relationships among the school community, (B) holding each student accountable for any challenging behavior, and (C) ensuring each such student has a role in repairing relationships and reintegrating into the school community.

# Students

## Challenging Behavior Prevention: Restorative Practices Response

**Definitions** (continued)

"**Challenging Behavior**" means behavior that negatively impacts school climate or interferes, or is at risk of interfering with, the learning or safety of a student or the safety of a school employee.

"**Evidenced-Based Practices**" in education refer to instructional and school-wide improvement practices that systematic empirical research has provided evidence of statistically significant effectiveness.

"**School Climate**" means the quality and character of school life, with a particular focus on the quality of the relationships within the school community. It is based on patterns of people's experiences of school life and reflects the norms, goals, and organizational structures within the school community.

**"Social and Emotional Learning"** means the process through which children and adults achieve emotional intelligence through the competencies of self-awareness, self-management, social awareness, relationship skills and responsible decision-making.

**"Emotional Intelligence"** means the ability to (A) perceive, recognize, and understand emotions in oneself or others, (B) use emotions to facilitate cognitive activities, including, but not limited to, reasoning, problem-solving and interpersonal communication, (C) understand and identify emotions, and (D) manage emotions in oneself and others.

**"School Community"** means any individuals, groups, businesses, public institutions and nonprofit organizations that are invested in the welfare and vitality of a public school system and the community in which it is located, including, but not limited to, students and their families, members of the local or regional board of education, volunteers at a school and school employees.

**"School Environment"** means a school-sponsored or school-related activity, function or program, whether on or off school grounds, including at a school bus stop or on a school bus or other vehicle owned, leased or used by a local or regional board of education, and may include other activities, functions or programs that occur outside of a school-sponsored or school-related activity, function or program if bullying at or during such other activities, functions or programs negatively impacts the school environment.

### Purpose

The purpose of this policy is to support school discipline that:

1. The school district community has a shared vision and plan for promoting and sustaining a positive school climate that focuses on prevention, identification and response to all challenging behavior;
2. Maintains safe and engaging learning communities;

## Students

### Challenging Behavior Prevention: Restorative Practices Response

**Purpose** (continued)

3. Assures consistency and coherence across all schools in the District;
4. Defines and communicates expectations for student behavior;
5. Defines and communicates expectations for staff responsibility related to school discipline;
6. Balances the needs of the student, the needs of those directly affected by "challenging behaviors," and the needs of the overall school community;
7. Assures equity across racial, ethnic, and cultural groups and all other protected classes, including, but not limited to, gender, color, national origin, ancestry, religion, age, disability, sexual orientation, and gender identity and expression.

**General Principles**

1. A positive school climate is best accomplished by preventing challenging behaviors before they occur and using effective restorative practices, in response to those challenging behaviors that may occur despite proactive measures;
2. School safety and academic success are formed and strengthened when all school staff and employees build positive relationships with students and their parents and/or guardians;
3. Effective school climate maximizes the amount of time students spend learning academically, socially, and emotionally, ethically, civically, and intellectually and minimizes the amount of time students cause disruption or are removed from their classrooms due to an act of challenging behavior;
4. School discipline should be reasonable, timely, fair, age-appropriate, and should be proportionate to the student's challenging behavior. Response to an act of challenging behavior that is rooted in restorative practices will provide meaningful instruction and guidance, offers students an opportunity to learn from their mistakes and is more likely to result in engaging rather than punitive responses to challenging behavior. The school community should adopt policies that promote a restorative school environment focused on overcoming barriers to teaching and learning by building and supporting meaningful school-wide relationships, and intentionally re-engaging and disengaged students, educators, and families of students in the school community;
5. Effective school climate improvement is a restorative process that engages all school community members in promoting a positive school climate. The vast majority of challenging behaviors should be addressed at the classroom level by teachers; however, behaviors that cannot be addressed at this level should receive more targeted and intensive interventions, as determined by an individualized assessment;

## Students

### Challenging Behavior Prevention: Restorative Practices Response

**General Principles** (continued)

6. The District serves a diverse community. In order to serve all students and to prepare them to be members of an increasingly diverse community, schools and staff must build cultural competence. We must commit to eliminating institutional racism and any other discrimination that presents barriers to success. The school community should create a school environment where everyone is safe, welcomed, supported, and included in all school-based activities;

7. Challenging behaviors, which may be subject to disciplinary action, including any within the school environment, but not limited to those occurring during either curricular or extracurricular activities, in classrooms, in school buildings, on school grounds, or in school vehicles, when such conduct is detrimental to the school environment and to the welfare or safety of other students or school personnel.

### General Policy Guidelines

The District's system of school climate improvement is built on the incorporation of restorative practices, which should include:

Evidence and research-based system-level restorative practices that focus on:

1) building high-quality, constructive relationships among the school community,
2) holding each student accountable for any challenging behavior, and
3) ensuring each such student has a role in repairing relationships and reintegrating into the school community.

Restorative practices should be guided by the Connecticut School Climate Standards:

1. The school district community has a shared vision and plan for promoting and sustaining a positive school climate that focuses on prevention, identification, and response to all challenging behaviors.

2. The school district community adopts policies that promote: a) a sound school environment that develops and sustains academic, social, emotional, ethical, civic, and intellectual skills; and b) a restorative school environment focused on overcoming barriers to teaching and learning by building and supporting meaningful school-wide relationships, and intentionally reengaging any disengaged students, educators, and families of students in the school community.

3. The school community's practices are identified, prioritized, and supported to: a) promote learning and the positive academic, social, emotional, ethical, and civic development of students. b) enhance engagement in teaching, learning, and school-wide activities. c) address barriers to teaching and learning; and d) develop and sustain a restorative infrastructure that builds capacity, accountability, and sustainability.

## Students

### Challenging Behavior Prevention: Restorative Practices Response

**General Policy Guidelines** (continued)

4. The school community creates a school environment where everyone is safe, welcomed, supported, and included in all school-based activities,
5. The school community creates a restorative system that cultivates a sense of belonging through norms and activities that promote social and civic responsibility, and a dedication to cultural responsiveness, diversity, equity, and inclusion.
   a. Practicing early identification and assessment of struggling students;
   b. Using a problem-solving/collaborative process to provide interventions matched to student needs;
   c. Ensuring timely progress monitoring and feedback; and
   d. Delivering scientific research-based interventions.

The District shall post this policy on the District website and in each school. A copy of this policy and accompanying procedures shall be readily available in each school's administration office.

Copies of this policy, any accompanying procedures/regulations, and school rules will be made available, upon request, to each student and parent/guardian and, upon request, promptly translated into a language that the parent/guardian can understand.

Applying the goals related to Restorative Practices Response, this policy's definitions, purpose, principles and guidelines, the Superintendent, or his/her/their designee shall develop such procedures and provide for any training necessary as may be needed to effectively implement this policy.

(cf. 1110.1 – Parent Involvement)
(cf. 4131 – Staff Development)
(cf. 5114 – Suspension/Expulsion; Student Due Process)
(cf. 5131 – Conduct)
(cf. 5131.1 – Bus Conduct)
(cf. 5131.6 – Drugs, Alcohol, Tobacco)
(cf. 5131.7 – Weapons and Dangerous Instruments)
(cf. 5131.8 – Out of School Grounds Misconduct)
(cf. 5131.9 – Gang Activity or Association)
(cf. 5131.911 – Connecticut School Climate Policy)
(cf. 5131.913 – Cyberbullying)
(cf. 5131.92 – Corporal Punishment)
(cf. 5141.4 – Reporting of Child Abuse and Neglect)
(cf. 5144 – Discipline/Punishment)
(cf. 5144.3 – Discipline of Students with Disabilities)
(cf. 5145.4 – Nondiscrimination)
(cf. 5145.5 – Sexual Harassment)
(cf. 5145.52 – Harassment)

## Students

### Challenging Behavior Prevention: Restorative Practices Response

Legal Reference: Connecticut General Statues

4-177 through 4-180. Contested Cases. Notice. Record, as amended.

10-233a through 10-233f Suspension, removal and expulsion of students, as periodically amended.

2la-240(9) Definitions.

53a-3 Definitions.

GOALS 2000: Educate America Act, Pub. L. 103-227.

18 U.S.C. 921 Definitions

Title III - Amendments to the Individuals with Disabilities Act Sec. 314

Elementary and Secondary Schools Act of 1968, as amended by the Gun Free Schools Act of 1994

PL 105-17 The Individuals with Disabilities Act, Amendments of 1997

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

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

Public Act 23-167, Section 74, An Act Concerning Transparency in Education

Policy adopted:
cps 4/24

*An administrative regulation to consider/modify to fit the local learning community.*

## Students

### Challenging Behavior Prevention: Restorative Practices Response

The following procedures are developed for implementing Board Policy #5144.12. They are designed to be consistent with the general purpose and principles outlined in the aforementioned policy and with federal and state statutes and regulations.

The District and staff are committed to establishing positive learning environments that ensure that all students have access to a quality education. The District recognizes that a key aspect of maintaining a healthy and safe environment is establishing and maintaining positive and constructive behavior in our schools. This goal can only be achieved through the cooperative efforts of our school personnel, students, parents, guardians, and our community.

**School Discipline Administration**

1. Staff training will be provided as needed to ensure that the Restorative Practices in each school are effective and that relevant policies and procedures are equitably applied. Such training will include, but not limited to, strategies and approaches related to Restorative Practices and its theoretical framework.

2. School district staff responsible for implementing this policy shall do so without discrimination based on ethnicity, race, color, religion, national origin, ancestry, gender, sexual orientation, sexual identity or expression, age or disability.

3. Challenging behavior related to students receiving special education and tiered intervention supports shall be in accordance with the student's Individualized Education Program (IEP), and behavior intervention plan, 504 Plan, and Board policy.

4. The District believes that developing strong relationships with families is the first step in establishing safe and healthy schools. School staff members are encouraged to contact parents early in the school year to proactively establish positive school-home communication and throughout the school year to share student successes and challenges, and develop plans to help students have access to a quality education. The District Schools will convene parent sessions to educate the community on Restorative Practices Response and how it will be implemented in the schools.

5. The District is committed to eliminating the disparity in school discipline with respect to its underserved populations by reducing the number of referrals, suspensions, and expulsions. The staff will engage in restorative practices that enhance school climate and develop a system for addressing challenging behavior that promotes equity. Staff members are specifically charged with monitoring the impact of their actions on students from racial and ethnic groups or other protected classes that have historically been over-represented among those students who are suspended, expelled or referred to law enforcement. The District will collect discipline data examining and aggregating referrals and disciplinary responses. In addition, principals will provide the Superintendent with an annual report highlighting Restorative Practices Response programs, their impact on school climate, and the number of referrals and disciplinary actions.

## Students

**Challenging Behavior Prevention: Restorative Practices Response** (continued)

### School-Level Rules

In developing school-level rules of behavior, the school shall solicit the participation, views, and feedback of at least one representative selected by each of the following groups:

1. Parents/guardians
2. Teachers
3. School administrators
4. For middle, junior high and high schools, students enrolled in the school

The "rules" shall be consistent with law, Board of Education (Board) policy, and District administrative regulations. The development of the rules shall be informed by school-level challenging behavior data as described in policy #5144.12.

The school shall also solicit participants' views on whether school-level and District-level standards of behavior are being equitably and fairly applied. The confidentiality of student records shall be maintained at all times.

### Interventions

**General:** Effective school responses related to challenging behavior shall promote interventions that refrain from interrupting a student's education to the extent possible. Schools should minimize the use of suspensions, recommendations for expulsion, and referrals to law enforcement to the extent practicable while remaining consistent with federal and state statutes, regulations, and Board policies.

**Reasonable Responses to Challenging Behavior Consequences:** Responses should be reasonable, fair, age-appropriate, and match the severity of the student's misbehavior, and through restorative practice consider the impact on the victim and/or community. Restorative practices that include meaningful instruction and guidance offer students an opportunity to learn from their mistakes and contribute back to the school community, and are more likely to result in having the student re-engage in learning.

### Relevant Considerations for Determining Restorative Practices

1. Age, health and special education status of the student.
2. Appropriateness of student's academic placement.
3. Student's prior conduct and record of challenging behavior.
4. Student's attitude.
5. Student's willingness to repair the harm.
6. Seriousness of the offense and the degree of harm caused.
7. Impact of the incident on the overall school community.
8. The availability of prevention programs designed to address challenging behavior should also be considered before determining a restorative practices response.

## Students

**Challenging Behavior Prevention: Restorative Practices Response** (continued)

**Interventions/Alternative Means of Correction:** When challenging behavior occurs, schools shall investigate the circumstances and gather facts that will help determine appropriate interventions and a restorative response for that student, with emphasis on correcting student misbehavior through school-based resources. Responses to challenging behavior should provide students an opportunity to learn from their mistakes and reengage the student in learning. All interventions should balance the needs of the student, the needs of those directly affected by the behavior, and the needs of the overall school community.

Each school is responsible for incorporating a restorative response framework into its planning to reduce referrals and suspensions through pro-active intervention, positive behavioral support, restorative practices, and other non-punitive approaches to challenging behavior focused on maximizing student achievement, reducing such behaviors and avoiding loss of instructional time through the use of tiered interventions. That intervention framework shall integrate a Restorative Practices framework.

Referral of students from the classroom environment for challenging behaviors should be avoided. The District expects alternatives to suspension and restorative practices to be utilized before referring a student out of the classroom. The District expects that alternatives will be undertaken within the classroom except where suspension for specific offenses is required by statute and Board policy or where it can be documented that the challenging behavior imposes a clear danger to others.

There are three types of intervention strategies to be considered: Administrative, Restorative, and Skill-based/Therapeutic.

1. **Administrative Strategies** are statutorily or policy-required interventions that respond "to" the offender. These include removal from the classroom, detention, suspension, and expulsion.
2. **Restorative Strategies** coordinate with Connecticut's School Climate Policy as they are problem-solving interventions responding "with" the offender. They are driven by an opportunity to restoration for the harm caused as much as possible and focus on the harm caused and how it will be repaired. A successful restorative practice response strategy may utilize interventions with allied agencies and professionals. An assessment of the incident/conduct will be completed, and the school or district will determine whether a face-to-face meeting with all parties is appropriate. Examples may include:
    a. Family group conferencing
    b. Victim-offender mediation
    c. Classroom mediation circles
    d. Reparation of harm

## Students

**Challenging Behavior Prevention: Restorative Practices Response** (continued)

**Interventions/Alternative Means of Correction** (continued)

3. **Therapeutic/Resource Strategies** are responses "by" the offender and require intrinsic motivational behavior change. Such interventions include:
    a. Mental health counseling
    b. Anger management classes
    c. Informal mentoring and behavior coaching

Teachers and administrators should intentionally utilize various types of strategies, or multiple strategies simultaneously, to address and correct challenging behavior, especially for multiple offenses.

Consider adopting a District Restorative Practices Response statement and model with a common framework, definitions, and procedures. This statement and model should be widely displayed and available to all school community members.

Considerations for Adopting a District Restorative Practices Response Model:

1. The degree to which the model is easily integrated with the District's Discipline policy;
2. The degree to which the model receives buy-in from the staff and school community;
3. The degree to which the model can be consistently and reliably implemented;
4. The degree to which adherence to the model is supported by research and yields positive results.

A statement and model can be designed in a manner similar to the following example:

**Restorative Justice in _____________ Public Schools**

The Board considers Restorative Practices Response as a set of principles and practices used to build community, respond to harm/conflict, and provide individual circles of support for students in District schools. By building, maintaining, and restoring relationships between members of the entire school community, the District strives to create an environment where all students can thrive. The Restorative Justice approach to school discipline is to be implemented through a 3-tier, school-wide model.

**Tier 1: Community Building (Prevention/Relate)**

Tier I is characterized by the use of social-emotional skills and practice (classroom circles) to build relationships, create shared values and guidelines and promote restorative conversations following a behavioral disruption. The goal is to build a caring, intentional, and equitable community with conditions conducive to learning.

**Tier 2: Restorative Processes (Intervention/Repair)**

Tier 2 is characterized by the use of non-punitive response to harm/conflict such as harm circles, mediation, or family group conferencing to respond to disciplinary issues in a restorative manner. This process addresses the root causes of the harm, supports accountability for the offender, and promotes healing for the victim(s), the offender, and the school community.

## Students

**Challenging Behavior Prevention: Restorative Practices Response** (continued)

**Interventions/Alternative Means of Correction** (continued)

### Tier 3: Supported Re-entry (Individualized/Re-Integrate)

Tier 3 is characterized by 1:1 support and successful re-entry of youth following suspension, truancy, expulsion or incarceration. The goal is to welcome youth to the school community in a manner that provides wraparound support and promotes student accountability and achievement.

### Classroom-based Strategies to Reduce Challenging Behaviors

Classroom-based strategies include, but are not limited to:

1. Explicit re-teaching of behavioral expectations;
2. Separating students;
3. Phone call to parent;
4. Keeping students after class;
5. Restorative conference with student(s) or class;
6. Creation of a positive behavior contract;
7. Conference with student;
8. Conference with parent and the student.

### School-based Strategies to Reduce Challenging Behaviors

Students who exhibit a pattern of challenging behaviors should be provided more intensive support through a system of tiered interventions. Parents should be notified if there is an escalating pattern of challenging behavior that could lead to classroom or school removal. Appropriate school-based strategies include, but are not limited to:

1. A conference between school staff and the student and his/her parents/guardians.
2. Referral to a school counselor or other school support service personnel for case management and counseling.
3. Referral for drug or alcohol counseling.
4. Convening of a Student Study Team (SST) or other intervention-related team to assess the behavior and develop and implement an individual plan to address the behavior in partnership with the student and his/her parents/guardians.
5. When applicable, referral for a comprehensive psychosocial or psychoeducational assessment or Applied Behavior Analysis, including for purposes of creating a behavior plan, an individualized education program, or a Section 504 plan.
6. Enrollment in a program for building anger management skills.
7. Continue to encourage participation in a restorative justice program.
8. A positive behavior support approach with tiered interventions that occur during the school day on campus.

## Students

### Challenging Behavior Prevention: Restorative Practices Response

**School-based Strategies** (continued)

9. After-school programs that address identified challenging behaviors or expose students to constructive activities and behaviors, including, but not limited to, those operated in collaboration with local parent and community groups.

### Detention After School

Students may be detained for disciplinary reasons (up to one hour) after the school day has ended.

If a student will miss his/her school bus because he/she is detained after school or is not transported by school bus, the principal or designee shall notify parents/guardians of the detention at least one day in advance so that alternative transportation arrangements may be made. The student shall not be detained unless the principal or designee notifies the parent/guardian.

Students shall remain under the supervision of a certified employee during the period of detention.

### Community Service

For consideration with a restorative practices response strategy, the Board, Superintendent, Principal, or Principal's designee may, at his/her discretion, allow for a student to perform community service during non-school hours on school grounds or, with the written permission of the student's parent/guardian, off school grounds. Such service may include but is not limited to, community or school outdoor beautification, campus betterment, and teacher, peer, or youth assistance programs.

### Referrals

The Board supports the adoption of the SRBI framework to facilitate a systems approach to positive, pro-social behavior management. The District expects teachers to attempt SRBI-tiered interventions prior to making a referral out of the classroom whenever possible.

When a referral out of the classroom is made, the principal or his/her designee must ensure that staff making the referral complete the following:

1. Teacher completed a written referral notification/form;
2. Principal or his/her designee reviewed the referral form and, if warranted, assigned appropriate consequences;
3. The Principal or his/her designee or teacher contacted the student's parents/guardians and notified them of any consequences;
4. The Principal or his/her designee investigated the reasons for the student's conduct;
5. The Principal or his/her designee recorded the classroom interventions and referrals in the District's database.

## Students

**Challenging Behavior Prevention: Restorative Practices Response** (continued)

**Notice to Parents/Guardians and Students**

At the beginning of the school year, the Superintendent or his/her designee shall notify parents/guardians about the availability of district rules and procedures related to student behaviors and school climate.

The Superintendent or his/her designee shall also provide written notice of behavior rules to transfer students at the time of their enrollment in the District.

Parent programs that relate to how the school integrates Restorative Practices Response in the student discipline/behavior management system will be provided.

**Annual Review/Discipline Committees**

Both individual schools and the district will evaluate and monitor the effectiveness of the school behavior plan using school disciplinary data disaggregated by race, ethnicity and gender of student. This will allow schools and the district to identify areas of need; target areas of concern; access professional development, supports, and services; and revise school procedures as needed.

In consideration with the Connecticut Positive School Climate Policy, schools will review student discipline data.

The review will include the following:

1. Intervention and prevention strategies.
2. The number of referrals, in school suspensions, out-of-school suspensions, expulsions, and referrals to law enforcement, disaggregated by race, ethnicity, age, grade, disability, and gender of the students, where available.
3. Differences in referrals among staff members.
4. The extent to which the policy, including but not limited to disciplinary action, is consistently applied to all students.
5. Review of Restorative Practices and their impact on student discipline and climate.

Based on the review, schools will make changes consistent with the intent of this and other related policies.

Schools are encouraged to establish a discipline committee including school personnel, parents and students to develop, monitor, and evaluate school discipline policy and school climate. The use of school discipline data is recommended in this process.

Regulation approved:
cps 1/18
rev 4/24

# Drug and Alcohol Testing for Bus Drivers

***Director of Transportation Collin Uressey's Input***

Our contracts with both First Student and the private transportation companies include provisions requiring compliance with all applicable laws, rules, regulations, and policies of Federal, State, and Local governments. This language effectively covers the vast majority of the content outlined in the CABE policy.

However, there is one area of potential concern: the following Board policy is not explicitly included in our current contracts.

> In addition to the cited federal requirements, the Board of Education expects its school transportation carriers to provide training to all school bus drivers, including instruction on:
>
> Identifying the signs and symptoms of anaphylaxis
> Administering epinephrine via a cartridge injector ("EpiPen")
>
> This expectation could be added to future contracts. However, for immediate implementation, we would need to formally request vendor compliance. The vendor may either agree to the change or agree contingent upon receiving additional funding to support the training requirement.
>
> Currently, school bus drivers are only authorized to administer basic first aid (e.g., providing a bandage) and are instructed to call 911 for all other emergencies.

For your reference, relevant sections from our current contracts are included below:

> First Student Contract
> Section III.A – GENERAL
> The contractor agrees to meet all regulations of the Connecticut State Statutes and those prescribed by the Commissioner of Motor Vehicles, as well as regulations issued by the Federal Department of Transportation. If any amendments to existing regulations during the term of the contract require major alterations to existing equipment, the associated costs will be subject to negotiation with the Board of Education.
>
> Private Transportation Contract
> LAWS AND BOARD POLICIES
> A. The Contractor shall comply with all laws, rules, regulations, and policies of Federal, State, and Local governments. It is the Contractor's responsibility to ensure that all employees are familiar with and follow these requirements, including any transportation manual or additional rules or policies issued by the Board.
> B. The Contractor must be familiar with all Board policies and regulations that impact the services.

# Bus Driver Drug Testing Program Update: Clearinghouse

~Page 1~

*(Background Information for Policy Review Committee)*

The United States Department of Transportation (USDOT) through the Federal Motor Carrier Safety Administration Agency (FMCSA) amended the rules for the commercial driver's license drug testing program to establish requirements for the Commercial Driver's License Drug and Alcohol Clearinghouse (Clearinghouse). The Clearinghouse was required to be established by federal law with the intent to improve road safety. (49 CFR Section 382.701 et seq.)

The Clearinghouse is a secure online database that gives employers, the Federal Motor Carrier Safety Administration (FMCSA), State Driver Licensing Agencies (SDLAs), and State law enforcement personnel real-time information about commercial driver's license (CDL) and commercial learner's permit (CLP) holders' drug and alcohol program violations.

The Clearinghouse contains records of violations of drug and alcohol prohibitions in 49 CFR Part 382, Subpart B, including positive drug or alcohol test results and test refusals. When a driver completes the return-to-duty (RTD) process and follow-up testing plan, this information is also recorded in the Clearinghouse.

The purpose of the Clearinghouse is to maintain records of every violation of the drug and alcohol testing program in a central depository so that employers of CDL holders may have one electronic resource to use in order to determine if potential drivers and current employees have violated the USDOT drug and alcohol testing regulations. The Clearinghouse will identify drivers who move frequently and obtain CDLs in different states and link those CDLs, in order to maintain complete and accurate information on such drivers.

The amended rules require employers to amend their drug and alcohol testing policy to include the use of the Clearinghouse.

The Clearinghouse began its operation in 2020. Every employer who employs CDL drivers must register as employers in the Clearinghouse. The website for the Clearinghouse is https://clearinghouse.fmcsa.dot.gov/. The employer is required, as part of the registration process, to name its employees who will have the authority to make an inquiry. For school districts this would be the superintendent and/or the transportation director, business manager or the person overseeing the transportation responsibility for the local district. The designated persons will be allowed to make the inquires required by the regulations.

The regulations require an employer to make an inquiry to the Clearinghouse for applicants for a CDL driver position, such as school bus drivers. Information will be provided by this initial inquiry as to whether or not the Clearinghouse contains information regarding whether the driver has violated the drug and alcohol regulations which include testing positive on one of the required tests or has been found to violate one of the prohibited activities in the regulations. Prohibited activities include the use of alcohol while performing a safety-sensitive function on the job or consuming alcohol within four hours before performing a safety-sensitive function. A violation indicated in the Clearinghouse requires the employer to do a full inquiry within 24 hours in order to attain the details of the violation.

The written consent of the driver is required prior to doing any initial or full inquiry. Failure of the driver to provide consent prohibits the employer from hiring the applicant. The purpose of doing an annual inquiry of current employees is to determine if these employees have committed any violations while working for other covered current employers. Clearinghouse information received by the employer is confidential and cannot be disclosed to another entity or to other employees who do not have the authority to hire or discipline the driver/employee.

The employers of CDL drivers are required to input information on their current employees when such employees have violated the regulations. What must be reported to the Clearinghouse include positive drug and alcohol tests required by the regulations, actual knowledge of the violations of the drug and alcohol regulations such as the use of drugs and/or alcohol prior to performing safety-sensitive functions or while on duty or the driver's refusal to be tested. Information must be posted to the Clearinghouse by the employer within three business days of the violation's occurrence.

The regulations require a prospective employer to get drug and alcohol testing information from prior employers who employed the driver within the last three years, until January 6, 2023. After that date, an employer making an inquiry to the Clearinghouse on the driver/applicant will fulfill this requirement.

Drivers are not required to register for the Clearinghouse. However, a driver will need to be registered to provide electronic consent in the Clearinghouse if a prospective or current employer needs to conduct a full query of the driver's Clearinghouse record – this includes all pre-employment queries. A driver must also be registered to electronically view the information in his or her own Clearinghouse record. Registered drivers will have their Clearinghouse accounts and contact preferences set up, allowing them to quickly respond to query requests from employers.

**Policy Implications**

The regulations require the employer to state in its policy on the CDL drug and alcohol testing program information on the requirement of the employer to report violations of the program to the Clearinghouse and to include such information in the training and notice materials given to drivers as required by the regulations.

The CABE sample policy pertaining to drug and alcohol testing for school bus drivers has been revised to address the Clearinghouse requirements.

It is important that contracts entered into between the school district and a transportation carrier for bus transportation services, if the district does not run its own buses, include language pertaining to the assurance that the contractor will establish a drug and alcohol-testing program that meets the requirements of federal regulations, state statutes and the district's policy and that the contractor will actively enforce the regulations of the policy as well as state and federal requirements.

Policy #4212.42, "Drug and Alcohol Testing for School Bus Drivers," is a required policy per federal mandate. Several versions are available, including an administrative regulation.

**January 2021**

*A required policy per federal mandate.*

## Personnel Non-Certified

### Drug and Alcohol Testing for School Bus Drivers

The ___________________________ Public School district is committed to the establishment of a drug use and alcohol misuse prevention program that meets all applicable requirements of the Omnibus Transportation Employee Testing Act of 1991 (OTETA), as may be amended, and applicable state statutes pertaining to pre-employment and random drug testing of school bus drivers. The District shall adhere to federal and state law and regulations requiring a school bus driver's drug and alcohol testing program.

In addition to the above cited federal requirement, the Board of Education expects its school transportation carrier to provide training to all school bus drivers, including instruction on (1) identifying the signs and symptoms of anaphylaxis, (2) administering epinephrine by a cartridge injector ("EpiPen"), (3) notifying emergency personnel, and (4) reporting an incident involving a student's life-threatening allergic reaction.

Each carrier must provide the training to school bus drivers following the issuance or renewal of a public passenger endorsement to operate a school bus for carrier employees, and upon the hiring of a school bus driver who is not employed by such carrier (e.g., subcontractor), except a driver who received the training after the most recent issuance or renewal of his or her endorsement is not required to repeat it.

### Drug and Alcohol Clearinghouse Checks for CDL Drivers

Prior to employment the District/school transportation carrier will conduct a full query of the Federal Motor Carrier Safety Administration's Drug and Alcohol Clearinghouse (Clearinghouse) to obtain information about the driver's eligibility under federal rules to perform a safety-sensitive function. The District/school transportation carrier will also contact prior employers where the applicant was a CDL driver for information to determine the driver's eligibility to perform safety-sensitive functions. (Prior employers' inquiries will continue until January 2023.)

The District/school transportation carrier will conduct a limited query of the Clearinghouse for current CDL drivers who are employees on at least an annual basis. If information exists in the Clearinghouse about a driver, the District/school transportation carrier will conduct a full query within 24 hours to determine if the driver is eligible to perform safety-sensitive functions. If the District/school transportation carrier fails to conduct the full query within 24 hours, the driver will not be allowed to perform any safety-sensitive functions until the full query is conducted and it is determined the driver may perform safety-sensitive functions.

The District/school transportation carrier will report the following information collected and maintained on each CDL driver to the Clearinghouse:

1. A verified positive, adulterated, or substituted drug test result;

2. An alcohol confirmation test with a concentration of 0.04 or higher;



## Personnel Non-Certified

**Drug and Alcohol Testing for School Bus Drivers**

**Drug and Alcohol Clearinghouse Checks for CDL Drivers** (continued)

3. A refusal to submit to any test required by this policy or the CDL drug testing program (49 C.F.R. Part 382, subpart C);
4. An employer's report of actual knowledge of the following:
   a. On duty alcohol use (pursuant to 49 C.F.R. §382.205);
   b. Pre-duty alcohol use (pursuant to 49 C.F.R. §382.207);
   c. Alcohol use following an accident (pursuant to 49 C.F.R. §382.209); and
   d. Controlled substance use (pursuant to 49 C.F.R. §382.213).
5. A substance abuse professional (SAP) (as defined in 49 C.F.R. §40.3) report of the successful completion of the return-to-duty process;
6. A negative return-to-duty test; and
7. An employer's report of completion of follow-up testing.

***<u>Additional language to consider:</u>***

> *(School districts contracting with a private service provider must ensure the provider has a drug and alcohol testing program fulfilling federal regulations, and state law pertaining to a required pre-employment and random drug testing program for drivers of school buses and school transportation vehicles (STVs) that carry ten or fewer students.)*

***<u>Alternate Version</u>***

In a continuing effort to prevent accidents and injuries resulting from the use of drugs and misuse of alcohol by drivers of commercial motor vehicles, the District shall establish a drug and alcohol misuse prevention program.

The District's program shall meet the requirements of the Omnibus Transportation Employee Testing Act of 1991, as maybe amended, and C.G.S.14-276a.

The Superintendent will develop administrative regulations as needed to implement the District's program including provisions for pre-employment, reasonable suspicion, random, post-accident, return-to-duty and follow-up testing as may be necessary. The regulations will also include training, education and other assistance to employees to promote a drug and alcohol-free environment.

Contracts for transportation approved by this District shall contain assurance that the contractor will establish a drug and alcohol-testing program that meets the requirements of federal regulations, state statutes and this policy and will actively enforce the regulations of this policy as well as federal and state requirements.

## Personnel Non-Certified

**Drug and Alcohol Testing for School Bus Drivers** (continued)

Such contract shall also contain the assurance that the school transportation contractor will use the Federal Motor Carrier Safety Administration's Drug and Alcohol Clearinghouse (Clearinghouse) database to report information to, and obtain information from, regarding drivers who are subject to the Department of Transportation's controlled substance and alcohol testing regulations.

This policy applies to all drivers and applicants for driver positions for the District who must have a Commercial Driver's License (CDL) to operate school vehicles.

In addition to the above cited federal requirement, the Board of Education expects its school transportation carrier to provide training to all school bus drivers, including instruction on (1) identifying the signs and symptoms of anaphylaxis, (2) administering epinephrine by a cartridge injector ("EpiPen"), (3) notifying emergency personnel, and (4) reporting an incident involving a student's life-threatening allergic reaction.

Each carrier must provide the training to school bus drivers following the issuance or renewal of a public passenger endorsement to operate a school bus for carrier employees, and upon the hiring of a school bus driver who is not employed by such carrier (e.g., subcontractor), except a driver who received the training after the most recent issuance or renewal of his or her endorsement is not required to repeat it.

Legal Reference: United States Code, Title 49

2717 Alcohol and controlled substances testing (Omnibus Transportation Employee Testing Act of 1991)

Code of Federal Regulations, Title 49

40 Procedures for Transportation Workplace Drug and Alcohol Testing Programs

382 Controlled Substance and Alcohol Use and Testing (as amended)

395 Hours of Service Drivers`

*Holiday v. City of Modesto* (1991) 229 Cal. App. 3d. 528, 540

*International Brotherhood of Teamsters v. Department of Transportation*

932 F. 2d 1292 (1991)

*American Trucking Association, Inc. v. Federal Highway Administration*, (1995) WL 136022 (4th circuit)

10-212c Life-threatening food allergies and glycogen storage disease: Guidelines; district plans. (as amended by PA 18-185)

## Personnel Non-Certified

### Drug and Alcohol Testing for School Bus Drivers

Legal Reference: Connecticut General Statutes (continued)

14-261b Drug and alcohol testing of drivers of certain vehicles, mechanics and forklift operators

14-276a Regulations re school bus operators and operators of student transportation vehicles; qualifications; training. Pre-employment drug test required for operators

52-557b Immunity from liability for emergency medical assistance first aid or medication by injection. School personnel not required to administer or render. (as amended by PA 05-144, An Act Concerning the Emergency Use of Cartridge Injectors and PA 18-185, An Act Concerning Life-Threatening Food Allergies in Schools)

Policy adopted:
rev 7/07
rev 5/18
rev 10/18
rev 2/20
rev 1/21

*Another version to consider.*

# Personnel - Non-Certified

## Drug and Alcohol Testing for Bus Drivers

The ________________________ Board of Education is committed to the establishment of a drug use and alcohol misuse prevention program that meets all applicable requirements of the Omnibus Transportation Employee Testing Act of 1991 and applicable state statutes pertaining to pre-employment and random drug testing of school bus drivers. The purpose of the testing program shall be to help prevent accidents and injuries resulting from the misuse of alcohol and controlled substances by drivers performing safety-sensitive functions.

All drivers subject to the commercial driver's license (CDL) requirements and this policy shall be prohibited from:

1. The use of any controlled substance on or off duty, unless a written prescription from a licensed doctor or osteopath is provided along with a written statement from the doctor or osteopath that the substance does not adversely affect the employee's ability to safely operate a commercial motor vehicle or perform other safety-sensitive functions;

2. The misuse of alcohol that could affect performance on the job including use on the job, use during the four hours before performing a safety-sensitive function, having prohibited concentrations of alcohol in their systems while performing a safety-sensitive function and use during eight hours following an accident.

**"Drugs"** in this policy refers to controlled substances covered by the Omnibus Act, including marijuana, cocaine, opiates, amphetamines and phencyclidine (PCP).

All employed drivers or employees transferring to positions subject to OTETA shall be subject to reasonable suspicion, random, post-accident, return-to-duty and follow-up alcohol and drug testing pursuant to procedures set out in the federal regulations. These procedures use an evidential breath testing device for alcohol testing. For controlled substances testing, urine specimen collection and testing by a laboratory certified by the U.S. Department of Health and Human Services is required. Employees who refuse to comply with testing requirements will also be regarded as testing positive for drugs or testing with a breath alcohol content level of 0.02 or higher.

All offers of employment or transfer to covered positions with the district will be made contingent upon testing results. An individual who tests positive for drugs will not be hired or transferred. The offer of employment will be immediately withdrawn from any individual who refuses drug testing.

## Personnel - Non-Certified

**Drug and Alcohol Testing for Bus Drivers** (continued)

[The District will also require pre-employment alcohol testing in accordance with the following provisions:

1. All candidates for employment or transfer with the District and subject to OTETA and state regulation requirements will be tested;
2. All tests will be conducted using the alcohol testing procedures of 49 CFR Part 40;
3. Such tests must be conducted prior to the new or transferred employee's performance of safety-sensitive functions.]

Random alcohol testing shall be limited to the time period surrounding the performance of safety-related functions which includes just before or just after the driver performs the safety-related function. Controlled substances testing may be performed at anytime while the driver is at work.

A driver covered by the federal regulations may not refuse to take a required test. An offer of employment or transfer will be immediately withdrawn from any individual who refuses drug testing.

If the testing confirms prohibited alcohol concentration levels or the presence of a controlled substance, the driver shall be removed immediately from safety-related functions in accordance with federal regulations. Before a driver is reinstated, if at all, the driver shall undergo an evaluation by a substance abuse professional, comply with any required rehabilitation and undergo a return-to-duty test with verified test results.

The Board retains the authority consistent with state and federal law to discipline or discharge any driver who is an alcoholic or chemically dependent and whose current use of alcohol or drugs affects the driver's qualifications for and performance of the job.

The District is not required under federal law requiring drug and alcohol testing to provide rehabilitation, pay for substance abuse treatment or to reinstate the employee. Notification of available resources for evaluation and treatment will be made as required by law. All employment decisions involving reinstatement, termination or dismissal shall be made in accordance with applicable state law, district policies and negotiated agreements.

The District shall maintain records in compliance with the federal regulations in a secure location with controlled access. With the driver's consent, the district may obtain any of the information concerning drug and alcohol testing from the driver's previous employer. An employee shall be entitled upon written request to obtain copies of any records pertaining to the employee's use of alcohol or controlled substances including information pertaining to alcohol or drug tests. Statistical records and reports shall be maintained and made available to the Federal Highway Administration for inspection or audit in accordance with federal regulations.

## Personnel - Non-Certified

**Drug and Alcohol Testing for Bus Drivers** (continued)

Records shall be made available to a subsequent employer upon receipt of a written request form an employee only as expressly authorized by the terms of the employee's request.

The District shall take steps to insure that supervisors receive proper training to administer the drug and alcohol testing program and that employees receive the notifications required by federal regulations.

This policy applies to all drivers and applicants for driver positions for the District who must have a Commercial Drivers License (CDL) to operate school vehicles.

[Contracts for transportation approved by this district shall contain assurance that the contractor will establish a drug and alcohol testing program that meets the requirements of federal and state regulations and this policy and will actively enforce the regulations of this policy as well as federal requirements.]

In addition to the above cited federal requirement, the Board of Education expects its school transportation carrier to provide training to all school bus drivers, including instruction on (1) identifying the signs and symptoms of anaphylaxis, (2) administering epinephrine by a cartridge injector ("EpiPen"), (3) notifying emergency personnel, and (4) reporting an incident involving a student's life-threatening allergic reaction.

Each carrier must provide the training to school bus drivers following the issuance or renewal of a public passenger endorsement to operate a school bus for carrier employees, and upon the hiring of a school bus driver who is not employed by such carrier (e.g., subcontractor), except a driver who received the training after the most recent issuance or renewal of his or her endorsement is not required to repeat it.

**Drug and Alcohol Clearinghouse Checks for CDL Drivers**

Prior to employment the District/school transportation carrier will conduct a full query of the Federal Motor Carrier Safety Administration's Drug and Alcohol Clearinghouse (Clearinghouse) to obtain information about the driver's eligibility under federal rules to perform a safety-sensitive function. The District/school transportation carrier will also contact prior employers where the applicant was a CDL driver for information to determine the driver's eligibility to perform safety-sensitive functions. (Prior employers' inquiries will continue until January 2023.)

The District/school transportation carrier will conduct a limited query of the Clearinghouse for current CDL drivers who are employees on at least an annual basis. If information exists in the Clearinghouse about a driver, the District/school transportation carrier will conduct a full query within 24 hours to determine if the driver is eligible to perform safety-sensitive functions. If the District/school transportation carrier fails to conduct the full query within 24 hours, the driver will not be allowed to perform any safety-sensitive functions until the full query is conducted and it is determined the driver may perform safety-sensitive functions.

## Personnel - Non-Certified

**Drug and Alcohol Testing for Bus Drivers** (continued)

**Drug and Alcohol Clearinghouse Checks for CDL Drivers** (continued)

The District/school transportation carrier will report the following information collected and maintained on each CDL driver to the Clearinghouse:

1. A verified positive, adulterated, or substituted drug test result;
2. An alcohol confirmation test with a concentration of 0.04 or higher;
3. A refusal to submit to any test required by this policy or the CDL drug testing program (49 C.F.R. Part 382, subpart C);
4. An employer's report of actual knowledge of the following:
    a. On duty alcohol use (pursuant to 49 C.F.R. §382.205);
    b. Pre-duty alcohol use (pursuant to 49 C.F.R. §382.207);
    c. Alcohol use following an accident (pursuant to 49 C.F.R. §382.209); and
    d. Controlled substance use (pursuant to 49 C.F.R. §382.213).
5. A substance abuse professional (SAP) (as defined in 49 C.F.R. §40.3) report of the successful completion of the return-to-duty process;
6. A negative return-to-duty test; and
7. An employer's report of completion of follow-up testing.

Legal Reference: United States Code, Title 49

2717 Alcohol and controlled substances testing (Omnibus Transportation Employee Testing Act of 1991)

Code of Federal Regulations, Title 49

40 Procedures for Transportation Workplace Drug and Alcohol Testing Programs

382 Controlled Substance and Alcohol Use and Testing (as amended)

395 Hours of Service Drivers

*Holiday v. City of Modesto* (1991) 229 Cal. App. 3d. 528, 540

*International Brotherhood of Teamsters vs. Department of Transportation* 932 F. 2d 1292 (1991)

*American Trucking Association, Inc. v. Federal Highway Administration,* (1995) WL 136022 [4th circuit]

10-212c Life-threatening food allergies and glycogen storage disease: Guidelines; district plans. (as amended by and PA 18-185)

## Personnel - Non-Certified

### Drug and Alcohol Testing for Bus Drivers

Legal References

Connecticut General Statutes (continued)

14-261b Drug and alcohol testing of drivers of certain vehicles, mechanics and forklift operators

14-276a Regulations re school bus operators and operators of student transportation vehicles; qualifications; training. Pre-employment drug test required for operators

52-557b Immunity from liability for emergency medical assistance first aid or medication by injection. School personnel not required to administer or render. (as amended by PA 05-144, An Act Concerning the Emergency Use of Cartridge Injectors and PA 18-185, An Act Concerning the Recommendations of the Task force on Life-Threatening Food Allergies in Schools)

Policy adopted:
rev 4/02
rev 7/07
rev 11/18
rev 2/20

*A succinct version of this mandated policy to consider.*

## Personnel Non-Certified

### Drug and Alcohol Testing For School Bus Drivers

Contracts for transportation approved by this District shall contain assurance that the contractor will establish a drug and alcohol testing program that meets the requirements of federal regulations.

In addition, the Board of Education expects its school transportation contractor to train all school bus drivers, with instruction pertaining to the identification, the signs and symptoms of anaphylaxis, and in the administration of epinephrine by a cartridge injector ("EpiPen"), the notification of emergency personnel, and the reporting of an incident involving a student's life-threatening allergic reaction. Such training shall occur following the issuance or renewal of an endorsement to operate a school bus for carrier employees, and upon the hiring of a school bus driver, except a driver who received the training after the most recent issuance or renewal of his or her endorsement is not required to repeat it.

Prior to employment of bus drivers, the Board of Education expects its school transportation carrier to conduct a full query of the Federal Motor Carrier Safety Administration's Drug and Alcohol Clearinghouse (Clearinghouse) to obtain information about the driver's eligibility under federal rules to perform a safety-sensitive function. The District/school transportation carrier will also contact prior employers where the applicant was a CDL driver for information to determine the driver's eligibility to perform safety-sensitive functions. (Prior employers' inquiries will continue until January 2023.)

The school transportation carrier will also utilize the Clearinghouse for current CDL drivers who are employees on at least an annual basis. Required personal information that is collected and maintained in connection with the testing program shall also be reported, as required, to the Clearinghouse.

Legal Reference: United States Code, Title 49

2717 Alcohol and controlled substances testing (Omnibus Transportation Employee Testing Act of 1991)

Code of Federal Regulations, Title 49

40 Procedures for Transportation Workplace Drug and Alcohol Testing Programs

382 Controlled Substance and Alcohol Use and Testing (as amended)

395 Hours of Service Drivers

*Holiday v. City of Modesto* (1991) 229 Cal. App. 3d. 528, 540.

*International Brotherhood of Teamsters v. Department of Transportation*

932 F. 2d 1292 (1991)

*American Trucking Association, Inc. v. Federal Highway Administration*, (1995) WL 136022 (4th circuit)



## Personnel Non-Certified

### Drug and Alcohol Testing for School Bus Drivers

Legal Reference: Connecticut General Statutes (continued)

10-212c Life-threatening food allergies and glycogen storage disease: Guidelines; district plans. (as amended by PA 18-185)

14-261b Drug and alcohol testing of drivers of certain vehicles, mechanics and forklift operators

14-276a Regulations re school bus operators and operators of student transportation vehicles; qualifications; training. Pre-employment drug test required for operators

52-557b Immunity from liability for emergency medical assistance first aid or medication by injection. School personnel not required to administer or render. (as amended by PA 18-185, An Act Concerning the Recommendations of the Task Force on Life-Threatening Food Allergies in Schools)

Policy adopted:
rev 10/18
rev 2/20

*A mandated policy to consider.*

## Personnel -- Certified

### Minimum Duty-Free Lunch Periods for Teachers

The Board of Education, in compliance with P.A. 22-80, shall provide a minimum 30-minute uninterrupted lunch period for teachers and other certified staff.

Legal Reference: Connecticut General Statutes

PA 22-80 An Act Concerning Childhood Mental and Physical Health Services in School.

*Sample policy to consider, with several options to consider.*

## Business/Non-Instructional Operations

### Food Service

### Charging Policy

The goal of the food service program is to provide students with nutritious and healthy foods, through the District's food services program, that will enhance learning. The school nutrition program is an essential part of the education system and by providing good-tasting, nutritious meals in pleasant surroundings; we are helping to teach students the value of good nutrition.

**Alternate language to consider**: *Connecticut's school Child Nutrition Programs consist of the National School Lunch, School Breakfast, Special Milk, After School Snack and Fresh Fruit and Vegetable Programs. It is a local decision as to in which programs the District selects to participate. These programs are federally funded and are administered by the United States Department of Agriculture's Food and Nutrition Service. At the State level, the school Child Nutrition Programs are administered by the Connecticut State Department of Education, which operates the program through agreements with the local school food authorities.*

*The school nutrition program is an extension of the school's educational programs and it is the District's vision to have a partnership among students, staff, school family and the community in offering access to and providing nutritious meals, which are attractively presented at an affordable price.*

The Board of Education (Board) has an agreement with the Connecticut State Department of Education to participate in one or more school Child Nutrition Programs and accepts full responsibility for adhering to the federal and state guidelines and regulations pertaining to these school Child Nutrition Programs. The Board also accepts full responsibility for providing free Breakfast and Lunch or reduced price meals to eligible elementary and secondary all students enrolled in the District's schools. The Bristol Public Schools operates under the Community Eligible Provision program from the USDA. This program allows every student in Bristol to receive a free Breakfast and Lunch every day. There is no need to have a system where these student need to charge a meal at ant time. If a student wishes to purchase a second meal or additional food for their meal they can do so when they go through the service line but they can't charge a second meal or other food item. This must be paid for at the time of service with cash or money on their Myschoolbucks account. Applicants for such meals are responsible to pay for meals until the application for the free or reduced price meals is completed and approved. All applications for free and reduced price lunch and any related information will be considered strictly confidential and not to be shared outside of the District's food services program. Meals are planned to meet the specified nutrient standards outlined by the United States Department of

Agriculture for children based on their age or grade group.

**Note:** *At the discretion of the school food authority, schools participating in the National School Lunch Program and School Breakfast Program may offer meals at no cost to children who would otherwise qualify for reduced price benefits. This is a strategy to consider to prevent children eligible for reduced price meals from accruing unpaid meal charges.*

Although not required by law, because of the District's participation in the Child Nutrition Programs, the Board approves the establishment of a system that has no need to have the possibility of allowing a student to charge a meal. to allow a student to charge a meal.

The Board realizes that funds from the non-profit school food service account, according to federal regulations, cannot be used to cover the cost of charged meals that have not been paid.

## Business/Non-Instructional Operations

### Food Service

**Charging Policy** (continued)

Moreover, federal funds are intended to subsidize the meals of children and may not be used to subsidize meals for adults (teachers, staff and visitors). Adults are not allowed to charge meals and shall pay for such meals at the time of service or through pre-paid accounts.

This can be left in but we don't refuse a meal to anyone because they are already free or have a specific option for students that have a negative balance so it's not really necessary. The Board prohibits the public identification or shaming of a child/student for any unpaid charges, including, but not limited to, the following:

- Delaying or refusing to serve a meal to such student,
- Designating a specific meal option for such student or otherwise taking any disciplinary action against such student.

A student needing to charge a meal will be informed of his/her right to purchase a meal, which may exclude a la carte items, for any school breakfast, lunch or other feeding.

In order to sustain the District's food services program, the District cannot permit the excessive charging of student meals. Therefore, any charging of meals must be consistent with this policy and any accompanying regulations. The Superintendent or his/her designee shall develop regulations designed to effectively and respectfully address family responsibility for unpaid meals.

Any parent/guardian who anticipates a problem with paying for meals is encouraged to contact the Food Services Manager/Director and/or the applicable school Principal for assistance. The Board encourages all families who may have a child eligible for free or reduced price lunch to apply.

### Definitions

**"Delinquent Debt"** are unpaid meal charges, like any other money owed to the nonprofit school food service account when payment is overdue, as defined by state or local policies.

**"Bad Debt"** are when unpaid meal charges are not collected and are considered a loss. Such debt must be written off as an operating loss, which cannot be absorbed by the nonprofit school food service account, but must be restored using nonfederal funds.

**Elementary Students** ***(Options to consider/choose)***

1. The District shall maintain a "no charging policy." The charge/no charge policy will be strictly enforced to eliminate unnecessary debt within the School Food Service Program.
2. The District operates under the CEP program and there is no need to have a policy to charge a meal since they are all already free.

## Business/Non-Instructional Operations

**Food Service**

**Charging Policy** (continued)

**Elementary Students** ***(Options to consider/choose)*** (continued)

3. The District uses MySchool Bucks____________________, an automated prepayment system, which allows parents/guardians to view their child's meal account balance and purchases, receive low-balance notifications, as well as, make deposits, to their child's school meal account. Any student whose account has insufficient funds (i.e., is at the charging limit) and does not bring a meal from home may charge any combination of meals up to an amount not to exceed the cost of thirty (30) meals. Negative balance status can be avoided by making a payment in the form of cash, check, or by credit card to the MySchool Bucks______________website.

4. Students shall be allowed up to thirty (30) reimbursable meal charges. All other a-la-carte items shall not be charged. After thirty charges, the parents/guardians of such child will be referred to the District's homeless education liaison. The alternate meal shall consist of one or more of the examples listed above. When a charge is occurred, a written notification shall be sent home to parents. All credited meals must be repaid.

   Communications with parents/guardians regarding collection of a child's unpaid meal charges shall include information on local food pantries, application for free or reduced price meals and the Department of Social Services' supplemental nutrition assistance program and a link to the District's website that lists any community services available to town/city residents.

5. No elementary or middle school student shall be deprived a reimbursable meal due to forgotten or lost meal money. The school Principal will be responsible for maintaining a fund of money to loan to students without meal money. The pool of money may be established from school or PTA/PTO funds. The Principal or his/her designee is responsible for collecting money that has been loaned to students. Students will be responsible for repaying all loaned money within an established timeframe. A note shall be given to the student to take home or mailed to the student's home to inform parents of the loan obligation. In situations in which a student is consistently without meal money, the Principal or his/her designee should encourage the parent/guardian to apply for free or reduced price meals.

   Communications with parents/guardians regarding collection of a child's unpaid meal charges shall include information on local food pantries, application for free or reduced price meals and the Department of Social Services' supplemental nutrition assistance program and a link to the District's website that lists any community services available to town/city residents.

The Board will accept gifts, donations, or grants from any public or private sources for the purpose of paying off any unpaid charges for school meals.

## Business/Non-Instructional Operations

**Food Service**

**Charging Policy**

**Elementary Students** ***(Options to consider/choose)*** (continued)

6. The District strongly discourages meal charges, but understands that an occasional emergency makes it necessary at the elementary level. The District/school policy is as follows:

   a. All charges must be paid in 10 days.
   b. Students may not charge more than 5 reimbursable meals.
   c. Parents will be notified and asked for prompt payment after 3 charges.
   d. Communications with parents/guardians regarding collection of a child's unpaid meal charges shall include information on local food pantries, application for free or reduced price meals and the Department of Social Services' supplemental nutrition assistance program and a link to the District's website that lists any community services available to town/city residents.

7. Students shall be allowed to charge up to thirty meals. The student will be given the same reimbursable meal that other children are provided. Parents of students who charge shall be notified by phone, after their child has received the meal. If a pattern of charging continues, attempts will be made to discuss the issue with the parents/guardians and encourage them to complete a free and reduced meal application. Communications with parents/guardians regarding collection of a child's unpaid meal charges shall include information on local food pantries, application for free or reduced price meals and the Department of Social Services' supplemental nutrition assistance program and a link to the District's website that lists any community services available to town/city residents.

**Secondary Students (*Options to consider/choose*)**

1. A student shall not be allowed to purchase any reimbursable meal on credit.

2. The District uses _MySchoolBucks__________________, an automated prepayment system, which allows parents/guardians to view their child's meal account balance and purchases, receive low-balance notifications, as well as, make deposits, to their child's school meal account. Any student whose account has insufficient funds (i.e., is at the charging limit) and does not bring a meal from home may charge any combination of

meals up to a negative balance of $6.00. No snacks or a-la-carte items may be charged. *(A source of funding needs to be established based upon the fact that the cost of this meal cannot come out of the school food service account.)* If a student with a negative balance attempts to purchase a-la-carte items with cash, the money must first be applied to the negative balance.

## Business/Non-Instructional Operations

**Food Service**

**Charging Policy** (continued)

**Secondary Students (*Options to consider/choose*)** (continued)

3. Students may charge up to _____ meals at the middle school level and 2 meals at the high school level. (*A source of funding needs to be established based upon the fact that the cost of this meal cannot come out of the school food service account.)*

4. Students shall be allowed to charge up to two meals. The student will be given the same reimbursable meal that other children are provided. Parents of students who charge shall be notified by phone, after their child has received the meal. After charging four meals, the parents shall receive written notification. If a pattern of charging continues, attempts will be made to discuss the issue with the parents/guardians and encourage them to complete a free and reduced meal application.

**District-Wide (*Options to consider/choose*)**

1. Parents are responsible for providing meals or meal money for their student(s). Borrowing or charging is for one meal only in an emergency. Repayment is expected without delay. Snack and a-la-carte purchases are cash only.

2. Although not required by law, because of the District's participation in the school Child Nutrition Programs, the Board of Education approves the establishment of a system to allow a student to charge a meal. The Board authorizes the Superintendent to develop rules which address:

   a. What can be charged;
   b. The limit on the number of charges per student;
   c. The system used for identifying and recording charged meals;
   d. The system used for collection of repayments; and
   e. Ongoing communication of the policy to parents/guardians and students.

**Delinquent Debt and Bad Debt**

The District's efforts to recover from households money owed due to the charging of meals must not have a negative impact on the children involved and shall focus primarily on the adults in the household responsible for providing funds for meal purchases. The school food authority is encouraged to consider whether the benefits of potential collections outweigh the costs which would be incurred to achieve those collections.

## Business/Non-Instructional Operations

**Food Service**

**Charging Policy**

**Delinquent Debt and Bad Debt** (continued)

Money owed because of unpaid meal charges shall be considered "delinquent debt," as defined, as long as it is considered collectable and reasonable efforts are being made to collect it. Such debt must be paid by June 30, effective with the 2017-2018 school year.

After reasonable attempts are made to collect the delinquent debt, and it is determined that further collection efforts are useless or too costly, the debt must be reclassified as "bad debt." Such debt shall be written off as an operating loss not to be absorbed by the nonprofit school food service account but must be restored using non-federal funds.

**Dissemination of Policy**

This policy shall be provided in writing to all households at the start of each school year and to households transferring to the school or school district during the school year.

This policy shall be included in student/parent handbooks, on online portals that households use to access student accounts, placed on the District's website, on the website of each school, and published at the beginning of each school year at the time information is distributed regarding free and reduced price meals and again to the household the first time the policy is applied to a specific child.

This policy shall be provided to all school staff and/or school food authority staff responsible for its enforcement. In addition, school social workers, nurses, the homeless liaison, and other staff members assisting children in need or who may be contacted by families with unpaid meal charges also should be informed of this policy.

The District's school food authority shall maintain, as required, documentation of the methods used to communicate this policy to households and school or school food authority-level staff responsible for policy enforcement.

(cf. 3542 – Food Service)
(cf. 3542.31 – Free or Reduced Price Lunch Program)

## Business/Non-Instructional Operations

**Food Service**

**Charging Policy**

Legal Reference: Connecticut General Statutes

10-215 Lunches, breakfasts and other feeding programs for public school children and employees. (as amended by PA 21-46)

10-215a Nonpublic school and nonprofit agency participation in feeding programs.

10-215b Duties of State Board of Education re feeding programs.
State Board of Education Regulations

State of Connecticut, Bureau of Health/Nutrition, Family Services and Adult Education Operational Memorandum No. 4-17, "Guidance on Unpaid Meal Charges and Collection of Delinquent Meal Payments," Nov. 2, 2016

Operational Memorandum #19-10, State of Connecticut, Bureau of Health/Nutrition, Family Services and Adult Education "Unallowable Charges to No-profit School Food Service Accounts and the Serving of Meals to No-paying Full and Reduced Price Students"

National School Lunch Program and School Breakfast Program; Competitive Foods. (7 CFR Parts 210 and 220, Federal Register, Vol 45 No. 20, Tuesday, January 29, 1980, pp 6758-6772

USDA Guidance:

- SP 46-2016, "Unpaid Meal Charges: Local Meal Charge Policies"
- SP 47-2016, "Unpaid Meal Charges: Clarification on Collection of Delinquent Meal Payment"
- SP 57-2016 "Unpaid Meal Charges: Guidance and Q and A"
- SP 58-2016 "2016 Edition: Overcoming the Unpaid Meal Challenge: Proven Strategies from Our Nation's Schools"

Policy adopted:
rev 4/17
rev 7/21

*Another version of this policy to consider originally prepared by the Food Research and Action Center.*

# Business/Non-Instructional Operations

## Food Service

## Charging Policy

The ___Bristol___________ School District recognizes the important link between proper nutrition and academic success. The purpose of this policy is to establish a consistent district procedure for charging meals when students do not have money to pay, preventing meal charges, and ensuring eligible children are certified for free and reduced-price school meals.

### Charging Meals

- The district operates under the USDA's CEP program so every student gets a free Breakfast And Lunch every Day so no applications are necessary or used in the district for the NSLP od NSBP.

Because hunger is an impediment to learning, no child shall be denied a school meal because of an inability to pay. Children will be served a meal that meets the U.S. Department of Agriculture nutrition standards for school meals.

Hand stamps, stickers, or any other means of overt identification of children with unpaid meal debt in the cafeteria or the classroom are prohibited. Additionally, children with unpaid meal debt shall not be required to work off their debt, including, but not limited to, wiping down tables or cleaning the cafeteria. The Board directs schools to avoid the public identification or shaming of a student for any unpaid meal charges. Therefore, the student shall not be denied the right to purchasing a meal nor should a specific meal option be offered.

### Preventing Meal Charges

To ensure that all eligible families are certified for free and reduced-price school meals, the school nutrition department shall:

- provide all households with school meal applications prior to the start of the school year and/or include instructions for completing online school meal applications;
- provide school meal applications in the primary language of the parent or guardian and provide assistance with completing an application for any household that requests assistance;
- promptly utilize data provided by the state or other school district officials to certify eligible children without an application; and

- assure that any child for which the school district is not able to obtain a completed school meal application, but becomes aware of their eligibility for free or reduced-price school meals shall be certified based on an application submitted by the appropriate school official, as permitted by USDA guidance.

To ensure that households are aware of negative account balances and the potential to accrue meal debt, the school nutrition department will:

- send out low balance notices prior to students needing to charge meals;
- notify and/or work with principals, school counselors, and/or teachers to understand the student and parent's situation and if a school meal application is needed;

## Business/Non-Instructional Operations

**Food Service**

**Charging Policy**

**Preventing Meal Charges** (continued)

- use automated calling system to notify parents of negative balances; and
- use automated email alerts to notify parents of negative balances.

Such notifications will include information on local food pantries, application for free or reduced-price meals, the supplemental nutrition assistance program administered by the Department of Social Services, and a link to the District's website that lists any available community services.

**Collecting Unpaid Meal Debt**

**We don't have unpaid meal debt so I'm not sure this is necessary to be in there but that would be your choice**

All communication regarding unpaid meal debt shall be directed at parents or guardians. Schools may send children home with a letter in an unmarked envelope. Such communication must include the information described above.

Prior to contacting households regarding unpaid meal debt, the school district shall ensure that the student is not participating in the Supplemental Nutrition Assistance Program (SNAP), the Temporary Assistance for Needy Families (TANF) program, or other federal programs, which would confer categorical eligibility for free school meals, or is not homeless, migrant, or in foster care, and would allow them to be certified without an application.

Any household with a negative school lunch account balance shall be contacted immediately by school nutrition staff by email, phone, or letter home to provide information on how to apply for free or reduced-price school meals or to add funds to the school nutrition account.

When a child's unpaid meal charges equal or exceed the cost of thirty (30) meals, such child's parent/guardian shall be referred to the District's homeless education liaison.

For households that cannot afford to pay their school meal charges, the school district will work with them to establish a payment plan. Households that are subsequently certified for free or reduced-price school meals at a point later in the school year shall not immediately be required to repay school meal debt accrued in that school year. The school district will submit retroactive claims for any meals charged to the household from the date of application to the date of certification, to the extent allowed by USDA guidance.

The Board will accept gifts, donations, or grants from any public or private sources for the purpose pf paying off any unpaid meal charges of students.

## Business/Non-Instructional Operations

### Food Service

### Charging Policy

Legal Reference: Connecticut General Statutes

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

10-215a Nonpublic school and nonprofit agency participation in feeding programs.

10-215b Duties of State Board of Education re feeding programs. (as amended by PA 21-46)

State Board of Education Regulations

State of Connecticut, Bureau of Health/Nutrition, Family Services and Adult Education Operational Memorandum No. 4-17, "Guidance on Unpaid Meal Charges and Collection of Delinquent Meal Payments," Nov. 2, 2016

Operational Memorandum #19-10, State of Connecticut, Bureau of Health/Nutrition, Family Services and Adult Education "Unallowable Charges to No-profit School Food Service Accounts and the Serving of Meals to No-paying Full and Reduced Price Students"

National School Lunch Program and School Breakfast Program; Competitive Foods. (7 CFR Parts 210 and 220, Federal Register, Vol 45 No. 20, Tuesday, January 29, 1980, pp 6758-6772

USDA Guidance:

- SP 46-2016, "Unpaid Meal Charges: Local Meal Charge Policies"
- SP 47-2016, "Unpaid Meal Charges: Clarification on Collection of Delinquent Meal Payment"
- SP 57-2016 "Unpaid Meal Charges: Guidance and Q and A"
- SP 58-2016 "2016 Edition: Overcoming the Unpaid Meal Challenge: Proven Strategies from Our Nation's Schools"

Policy adopted:

POLICY SERVICES

*Another version of this policy to consider.*

## Business/Non-Instructional Operations

### Food Service

### Charging Policy

In accordance with federal law and USDA guidelines the *[insert district name]* adopts the following policy to ensure District employees, families, and students have a shared understanding of expectations regarding meal charges. The policy seeks to allow students to receive the nutrition they need to stay focused during the school day, prevent the overt identification of students with insufficient funds to pay for school meals, and maintain the financial integrity of the District's nonprofit school nutrition program.

### Payment of Meals

Select one of the following choices:

☐**Option 1:** All meal purchases are to be prepaid before meal service begins. *[Insert description of how families may add money to student accounts (e.g., electronic payment options, pay at the school office, etc.) Students who do not have sufficient funds shall not be allowed to charge meals or a la carte items until additional money is deposited in the student account]*

☐**Option 2:** All meal purchases are to be prepaid before meal service begins. *[Insert description of how families may add money to student accounts (e.g., electronic payment options, pay at the school office, etc.) Students who do not have sufficient funds shall not be allowed to charge meals or a la carte items until additional money is deposited in the student account]*

☐**Option 3:** *[Insert a district specific process for payment of meals]*

Students who qualify for free meals shall never be denied a reimbursable meal, even if they have accrued a negative balance from previous purchases. Students with outstanding meal charge debt shall be allowed to purchase a meal if the student pays for the meal when it is received.

### Negative Account Balances

The District will make reasonable efforts to notify families when meal account balances are low. Additionally, the District will make reasonable efforts to collect annual unpaid meal charges classified as delinquent debt. The school district will coordinate communications with families to resolve the matter of unpaid charges. Families will be notified of an outstanding negative balance once the negative balance reassess $ [*insert dollar amount*] or [*insert number of meals*]. Families will be notified by [insert the method used to notify families (*e.g., automated calling system,* *letters sent home*]. Negative balances of more than $ [*insert dollar amount*], not paid prior to [*enter time period (e.g., end of the month, end of the semester, end of the school year)*] will be turned over to the Superintendent or his/her designee for collection. Options may include: collection agencies, small claims court, or any other legal method permitted by law.

# Business/Non-Instructional Operations

## Food Service

**Charging Policy** (continued)

### Communication of the Policy

The policy and supporting information regarding meal charges shall be provided in writing to:

- All households at or before the start of each school year;
- Students and families who transfer into the District, at time of transfer; and
- All staff responsible for enforcing any aspect of the policy.

Communications with parents/guardians regarding collection of a child's unpaid meal charges shall include information on local food pantries, application for free or reduced price meals and the Department of Social Services' supplemental nutrition assistance program and a link to the District's website that lists any community services available to town/city residents.

Records of how and when the policy and supporting information was communicated to households and staff will be retained.

The Superintendent may develop an administrative process to implement this policy.

***NOTE: This sample policy is drafted to be consistent for all grade levels. However, local boards may vary the meal charge policy for elementary, middle, and high schools. Districts should update the policy accordingly if they wish to delineate meal charge practices based on the grade level of student.***

(cf. 3542 – Food Services)
(cf. 3542.31 – Free or Reduced Price Lunch Program)

Legal Reference: Connecticut General Statutes

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

10-215a Nonpublic school and nonprofit agency participation in feeding programs.

10-215b Duties of State Board of Education re feeding programs. (as amended by PA 21-46)

State Board of Education Regulations

State of Connecticut, Bureau of Health/Nutrition, Family Services and

Adult Education Operational Memorandum No. 4-17, "Guidance on Unpaid Meal Charges and Collection of Delinquent Meal Payments," Nov. 2, 2016

## Business/Non-Instructional Operations

**Food Service**

**Charging Policy** (continued)

Legal Reference: (continued)

Operational Memorandum #19-10, State of Connecticut, Bureau of Health/Nutrition, Family Services and Adult Education "Unallowable Charges to No-profit School Food Service Accounts and the Serving of Meals to No-paying Full and Reduced Price Students"

National School Lunch Program and School Breakfast Program; Competitive Foods. (7 CFR Parts 210 and 220, Federal Register, Vol 45 No. 20, Tuesday, January 29, 1980, pp 6758-6772

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- SP 47-2016, "Unpaid Meal Charges: Clarification on Collection of Delinquent Meal Payment"
- SP 57-2016 "Unpaid Meal Charges: Guidance and Q and A"
- SP 58-2016 "2016 Edition: Overcoming the Unpaid Meal Challenge: Proven Strategies from Our Nation's Schools"

ted:

CABE

POLICY SERVICES

*An administrative regulation to consider/modify which complies with USDA regulations requirements.*

## Business/Non-Instructional Operations

### Food Service

### Charging Policy

### Purpose for Administrative Regulation

School boards must adopt a policy pertaining to student lunch accounts. Every effort must be made to collect delinquent debt. If the uncollectible debt is a student lunch account, it cannot be an expense to the school food service account and must be covered by non-Federal funds. A board of education can decide if it wants to develop separate procedures for primary-aged children versus secondary-aged children.

The following prohibitions must be adhered to when developing a student lunch/meal account procedure. Schools are not allowed to deny meals to any child for disciplinary reasons. Schools cannot deny a meal to a reduced or paid child, if the child has money in hand for the day's meal, and schools cannot deny a meal to a student eligible for free meals even if money is owed. Whatever procedure the school or food service establishes, the school must assure that the procedure does not discriminate against or single out any group of students.

### Procedures for Student Lunch/Meal Accounts

The National School Lunch Program (NSLP) requires school food authorities to establish written administrative guidelines and procedures for meal charges.

The District will adhere to the following meal charge procedures:

1. All cafeteria purchases are to be prepaid before meal service begins [*describe how households can prepay student accounts. If electronic payment options exist, provide a non-electronic payment option for those who don't have access to computer*s].
2. A student may charge up to $ _____ as long as they establish and maintain a good credit history of making payments on their food service accounts.
3. A staff member may charge up to $ _____ as long as they establish and maintain a good credit history of making payments on their food service accounts.
4. A student who has charged a meal may not charge or purchase "a la Carte" item(s), including extra main entrees or make purchases in [*enter any other purchasing areas such as a snack bar, school store, a la carte kiosk, etc.*]

5. If a student repeatedly comes to school with no lunch and no money, food service employees must report this to the building principal as this may be a sign of abuse or neglect and the proper authorities should be contacted.

## Business/Non-Instructional Operations

**Food Service**

**Charging Policy**

**Procedures for Student Lunch/Meal Accounts** (continued)

6. The food service manager or other school personnel will coordinate communications with the parent(s)/guardian(s) to resolve the matter of unpaid charges. Communications with parents/guardians regarding collection of a child's unpaid meal charges shall include information on local food pantries, application for free or reduced price meals and the Department of Social Services' supplemental nutrition assistance program and a link to the District's website that lists any community services available to town/city residents.

7. If food services staff suspects that a student may be abusing this policy, written notice will be provided to the parent(s)/guardian(s) that if he/she continues to abuse this policy, the privilege of charging meals will be refused.

   **or**

   If food services staff suspects that a student may be abusing this policy, written notice will be provided to the parent(s)/guardian(s) that if he/she continues to abuse this policy, the privileges of purchasing a meal will be refused.

8. The automated call system will notify parents every [*enter time period*] of any outstanding negative balance in the student's lunch/meal account. The food service manager will also will also send home letters each week to parents of students who carry negative balances of $ ____ and above.

9. All accounts must be settled at the [*enter time period*]. Letters will be sent home approximately _____ days before the [*enter time period*] to students who have any negative balances. Negative balances of more than $ _____ not paid in full in ______ days prior to the [*enter time period*] will force the District to take action to collect unpaid funds by means of collection agencies, small claims court, or any other legal method deemed necessary by the District.

10. Students who graduate or withdraw from the District and have $ ______ or more left in their lunch/meal food service account will be notified by mail by food services at the [*enter time period*] and given the option to transfer the funds to another student or to receive a refund. If no response is received within ____ days the student's lunch/meal account will close and the funds will no longer be available. Unclaimed remaining balances will be transferred to _______________ fund.

Regulation approved:
cps 6/17
rev 7/21
rev 5/24

## ~~PA 21-199 Section 5 – Challenging Curriculum Policy~~

~~*(Background information for Policy Review Committee)*~~

~~**Page 1**~~

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~~***Section 5*** of P.A. 21-199, "An Act Concerning Various Revisions and Additions to the Statutes Relating to Education and Workforce Development," requires each board of education to adopt a challenging curriculum policy by July 1, 2022, that aligns with State Department of Education (SDE) guidance.~~

~~The challenging curriculum policy shall include, but need not be limited to, the following:~~

1. ~~Criteria for the identification of students in grades eight and nine who may be eligible to take or enroll in an advanced course or program; and~~
2. ~~The requirement that these students have an academic plan.~~

~~An **"advanced course or program"** as defined in the legislation means an honors class, advanced placement class, International Baccalaureate program, Cambridge International Program, dual enrollment, dual credit, early college or any other advanced or accelerated course or program offered by a local or regional board of education in grades nine to twelve, inclusive.~~

~~The academic plan must be designed to enroll the student in one or more advanced courses or programs and allow the student to earn college credit or result in career readiness.~~

~~Furthermore, the academic plan must be aligned with the following:~~

1. ~~the courses or programs currently offered by the board of education;~~
2. ~~the student's student success plan;~~
3. ~~the high school graduation requirements established in state law; and~~
4. ~~any other board-adopted policies or standards relating to student enrollment eligibility for advanced courses or programs.~~

~~The Act allows a student or his or her parent/guardian to decline to implement the academic plan's provisions.~~

### ~~Policy Implications~~

~~This section of the Act is closely aligned with the provisions of Section 3 of P.A. 21-199. Section 3 of this legislation requires boards of education to adopt a policy or revise an existing one, also not later than July 1, 2022, concerning the eligibility criteria for student enrollment in an advanced course or program. The policy, according to the legislation, shall provide for multiple methods by which a student may satisfy the eligibility criteria for enrollment in an advanced course or program, including, but not limited to, recommendations from teachers, administrators, school counselors or other school personnel.~~

~~As used in section 3 of the Act, effective July 1, 2021, "advanced course or program" means an honors class, advanced placement class, International Baccalaureate Program, Cambridge International Program, dual enrollment, dual credit, early college or any other advanced or accelerated course or program offered by a local or regional board of education in grades nine to twelve, inclusive. The definition is the same for Section 5.~~

## ~~PA 21-199 Section 5 – Challenging Curriculum Policy~~

***~~(Background information for Policy Review Committee)~~***

**~~Page 2~~**

***~~(continued)~~***

~~Any policy adopted or revised and implemented under section 5 of P.L. 21-199, similar to section 3, is required to be in accordance with guidance provided by the State Department of Education (SDE).~~

~~A new policy, #6141.51, "Advanced Courses or Programs-Eligibility Criteria for Enrollment," has been developed regarding the requirements of section 3 of this legislation. That policy becomes a new mandated policy beginning with the 2022-2023 school year. That policy refers to enrollment criteria for advanced courses or programs offered by a school district in grades 9 through 12.~~

~~Section 5 of the Act speaks to criteria for the identification of students in grades eight and nine who may be eligible to take or enroll in an advanced course or program. A new "challenging curriculum policy" has been developed, and follows for your consideration.~~

~~Policy #6141.52 is a mandated policy beginning with the 2022-2023 school year.~~

**~~April 2022~~**

POLICY SERVICES *A mandated policy beginning in the 2022-2023 school year to consider.*

# Instruction

## Challenging Curriculum Policy (Criteria for Identification of Eligible Grade 8, 9 Students)

The Board of Education (Board) believes academically advanced courses and/or programs are designed to motivate students to understand rigorous content. The Board recognizes its responsibility to identify these students in grades 8 and 9, in compliance with Section 5 of P.A. 21-199, and to provide them with appropriate instructional adaptions and services. Any student who is capable of and wishes to do advanced course work or take an accelerated course or program, as detailed in this policy should be permitted to do so (in grades 8 and 9).

An "**advanced course or program**" as defined in this policy means an honors class, advanced placement class, International Baccalaureate Program, Cambridge International Program, dual enrollment, dual credit, early college or any other advanced or accelerated course or program offered by the Board. Such courses or programs are specifically designed to extend, enrich, and/or accelerate the standard school program in order to meet the needs of District students.

The Board's goal is to create a culture of deliberate excellence through its commitment to all students who have the capability, potential, or motivation to access advanced academic curriculum and instruction. The Board desires to nurture potential in all students and to challenge students with advanced capabilities through differentiation and responsive instruction. The needs of advanced and high potential learners will be equitability addressed across all populations.

In compliance with Section 5 of P.A. 21-199, the Board adopts this "challenging curriculum policy" aligned with State Department of Education (SDE) guidance. This policy includes, as required, the criteria for the identification of students in grades 8 and 9 who may be eligible to take or enroll in an advanced course or program, as defined, and that such identified students have an academic plan.

Priority placement will be given to students identified as gifted, as per policy #6172.1, "Gifted and Talented Students."

District middle schools will offer ~~advanced academic classes~~ rigorous coursework in the four content areas of language arts, mathematics, social studies and science.

Students taking high school credit courses in the middle school are required to meet all expectations for earning course credit applicable to meeting high school graduation requirements.

**Criteria**

~~For purposes of this policy these are students who possess or demonstrate high levels of ability in one or more content areas when compared to their chronological peers in the District and who would benefit from advanced courses or programs in order to achieve in accordance with their capabilities.~~

## Instruction

**Challenging Curriculum Policy (Criteria for Identification of Eligible Grade 8, 9 Students)**

**Criteria** (continued)

The Superintendent or his/her designee will develop procedures for an ongoing identification process that includes multiple measures in order to identify student strengths in intellectual ability, creativity or a specific academic area. The identification process shall include consideration of all students including those who are English language learners and those with Individualized~~ividualized~~ Education Plans or 504 Plans.

The purposes of identification are to find students who display characteristics which make them eligible for the taking of advanced courses or programs, as defined; to assess the aptitudes, attributes, and behaviors of each student; and to evaluate each student for the purposes of placement. Student aptitudes, attributes and academic behaviors will be identified, assessed and reviewed through a multistep, multimodal, and multidimensional identification system.

District and school-level principles will contribute to fostering greater equity in student participation in challenging curricula:~~Students who experience success in advanced courses or programs typically exhibit the following characteristics: reading at or above grade level; strong study skills and self-motivation; proficient oral and written communication skills; self-discipline to plan, organize, and carry out tasks to completion; and interest and self-directedness in the particular subject.~~

- Provide a course sequence and foundation-building in earlier grades, ensuring high expectations for all students, that makes later challenging coursework a viable option;
- Create multiple access points to challenging curriculum and programs;
- Use multiple methods by which a student may satisfy eligibility criteria for enrollment, including but not limited to:
    - Recommendations from teachers, administrators, school counselors or other school personnel, including the input of students and parents/guardians
    - Criteria not exclusively based on a students' prior academic performance
    - Use of a student's prior academic performance must rely on evidence-based indicators of how a student will perform in a challenging course
    - Academic improvement over time;
    - Scoring near benchmark on local assessments;
    - Identification of giftedness
    - Student interests, creative thinking ability, and persistence.

Such students may be found within any racial, ethnic, or socioeconomic group; within any nationality; within both genders; and within populations of students with disabilities.

**Identification Process**

Identification is a multistep process, which shall consist of screening and referral, assessment of eligibility and placement/enrollment based on the eligibility criteria within this policy.~~.~~

The Superintendent or his/her designee is directed to develop and document appropriate curricular and instructional modifications and/or programs for such identified students, in grades 8 and 9, indicating content, process, products and learning environments.

~~The identification process shall include the following:~~

- ~~Identification of students with:~~
  - ~~Superior cognitive ability;~~
  - ~~Specific academic ability in one or more of the following content areas; math, science, language arts, social studies (consistently received grades of "B" or higher in the core content areas);~~
  - ~~Creative thinking ability; and~~
  - ~~Giftedness.~~

# Instruction

## Challenging Curriculum Policy (Criteria for Identification of Eligible Grade 8, 9 Students)

**Identification Process** (continued)

- ~~Teacher recommendations/referrals~~
- ~~Referrals from parents, students~~
- ~~Placement tests if available~~
- ~~Parental approval~~

Detailed information will be made available on the District website regarding this policy and the procedures used to identify students who would benefit from enrollment in advanced courses or programs, and the required academic plan.

**Academic Plan**

Each identified student shall develop an academic plan for the period grade 8 through high school. The plan, developed with the assistance of parents/guardians and with the advice and recommendations of school personnel, shall be reviewed annually. The plan is to include a list of courses and learning activities/programs in which the student will engage while working toward the fulfillment of graduation requirements.

The student's academic plan must be designed to enroll the identified student in one or more advanced courses or programs and allow the student to earn high school and college credit or result in career readiness.

The academic plan must be aligned with the following:

1. the courses or programs currently offered by the Board of Education;
2. the student's student success plan;
3. the high school graduation requirements established in state law; and
4. any other Board-adopted policies or standards relating to student enrollment eligibility for advanced courses or programs.

A student or his or her parent/guardian have the right to decline the implementation of the provisions of the academic plan.

The academic plan enables a student to take a deeper look into what the high school years and beyond will look like. The student needs to be honest about himself/herself and consider their interests, strengths, likes, dislikes, as well as who they aspire to be as an individual. The plan should be updated as necessary and at a minimum, at least once a year.

## Instruction

**Challenging Curriculum Policy (Criteria for Identification of Eligible Grade 8, 9 Students)**

**Academic Plan** (continued)

Beginning in the middle school years, students must be counseled on opportunities for beginning postsecondary education prior to high school graduation. Such opportunities include access to Advanced Placement (AP), International Baccalaureate, or Cambridge courses or college-level courses for degree credit. Wherever possible, students shall be encouraged and offered opportunities to take college courses simultaneously for high school graduation and college degree credit (dual enrollment) upon approval of the Principal prior to such participation, the willingness of the college to accept the student for admission to the course or courses.

(cf. 6141.4 – Independent Study)
(cf. 6141.5 – Advanced College Placement)
(cf. 6141.51 – Advanced Courses or Programs-Eligibility Criteria for Enrollment)
(cf. 6172.1 – Gifted and Talented Students)
(cf. 6172.6 – Virtual/Online Courses)

Legal Reference: Connecticut General Statutes

P.A. 21-199 Section 5

10-221r Advanced placement course program. Guidelines.

District Guidance for Developing an Advanced Course Participation Policy

Policy adopted:
cps 4/22

Gifted and Talented Policy feedback
Provided by Alan Theriault Gifted and talent Teacher for BPS

1. State is requiring Gifted and Talented be included in CTSEDS. All students that meet testing requirements will have an individual G/T referral created in the system. Referral will include testing battery that will be administered, and a parental consent to conduct evaluation will be generated. Prior to administering the tests, informal PPTs will be held at each school, with stakeholders having the opportunity to share data/information about students in testing pool. Parents will not be part of PPT.
Upon completion of testing, informal PPT will be held that includes teacher, admin and pupil personnel representatives. Parents will be formally notified of testing results. A breakdown of testing protocol follows:

2. Torrance Test of Creativity Figural Test will be given to a grade 3 test pool, put together with teacher, admin. input from each school, including data trackers and recommendations.

3. CogAT 7 cognitive abilities testing will be administered for students in grades 4-8 each fall. Test pool will be comprised of students meeting cutoff scores on SBA from previous spring administration, as well as recommendations from building personnel, including classroom teachers, encore teachers, etc.

4. Renzulli behavioral rating scales will be completed by prior year's teacher/team in order to create a more detailed profile of each student.

5. Miscellaneous: Gifted coaches at each respective school will aid colleagues in creation of enrichment materials/options when necessary.

The state is going to do their best to migrate our currently identified G/T population into CTSEDS. If they are unable, I will have until the end of the year to move everyone over. It will be a little bit time consuming, as there does not seem to be a shortcut. Individual referrals would have to be created for everyone, even students who have been identified in prior years. With this year's newly identified students we will have a population of 363 students.

# PA 21-199 Section 2 – Gifted and Talented Students

*(Background information for Policy Review Committee)*

**Page 1**

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P.A. 21-199, "An Act Concerning Various Revisions and Additions to the Statutes Relating to Education and Workforce Development, ***Section 2***," requires local and regional boards of education to develop a policy, not later than July 1, 2022, for the equitable identification of gifted and talented students. The legislation indicates that such policy shall require the use of multiple methods of identification of gifted and talented students that are in compliance with guidance provided by the State Department of Education (SDE).

**Policy Implications**

This section of the Act impacts policy #6172.1, "Gifted and Talented Programs," and makes it a mandated policy beginning with the 2022-2023 school year.

The SDE in March 2019 issued the guidance document, "Gifted and Talented Education: Guidance Regarding Identification and Service." While this was done prior to the new legislation, it contains timely information which is included in this narrative.

The laws and regulations governing gifted and talented education are embedded within those that pertain to special education in Connecticut. It is important to note that gifted and talented education is not included in the federal Individuals with Disabilities Education Act (IDEA), which sets forth the federal requirements for special education. Only state laws and regulations apply to gifted and talented education, not the IDEA.

C.G.S. 10-76a (5) indicates that a student who has extraordinary learning ability or outstanding talent in the creative arts requires programs or services beyond the level of those ordinarily provided in regular school programs.

**Definition of Gifted and Talented**

C.G.S. 10-76a-2 offers the following three important definitions that serve as the foundation for the identification of students as gifted and/or talented:

**"Extraordinary learning ability"** means a child identified by the planning and placement team as gifted and talented on the basis of either performance on relevant standardized measuring instruments, or demonstrated or potential achievement or intellectual creativity, or both.

**"Gifted and talented"** means a child identified by the planning and placement team as (A) possessing demonstrated or potential abilities that give evidence of very superior intellectual, creative or specific academic capability and (B) needing differentiated instruction or services beyond those being provided in the general education program in order to realize the child's intellectual, creative or specific academic potential. The term shall include children with extraordinary learning ability and children with outstanding talent in the creative arts.

**"Outstanding talent in the creative arts"** means a child identified by the planning and placement team as gifted and talented on the basis of demonstrated or potential achievement in music, the visual arts or the performing arts.

These definitions can be synthesized into the following two broad descriptions of students who may be identified as gifted and/or talented:

1. those with extraordinary learning ability (commonly referred to as gifted); and/or
2. those with outstanding talent in the creative arts (commonly referred to as talented).

Extraordinary learning ability pertains to academic achievement and intellectual creativity. Outstanding talent in the creative arts pertains to achievement in music, the visual, or performing arts. Students in these classifications are collectively referred to as gifted and talented.

**Mandatory Referral, Identification, and Evaluation Services**

Subsection (b) of regulation10-76d-1 states that "Each board of education shall be required to provide referral, identification and evaluation services only for gifted and talented children enrolled in grades kindergarten to twelve, inclusive, in a public school under the jurisdiction of such board of education." Districts are mandated to have a process for the referral, identification, and evaluation of public school students enrolled in Grades K-12 as gifted and/or talented. The referral may come from any source including the teacher, administrator, parent, guardian, or child.

The Planning and Placement Team (PPT) is required to be used to evaluate and identify gifted and talented children. However, the composition of the PPT used for this purpose is different from the PPT composition for special education.

"For purposes of the evaluation, identification or determination of the specific educational needs of a child who may be gifted or talented, the PPT means a group of certified or licensed professionals who represent each of the teaching, administrative and pupil personnel staffs, and who participate equally in the decision making process." Note that the student's parent or guardian is not a required member of the PPT assembled for the purpose of identifying gifted and talented students.

Districts are required to evaluate and identify gifted and talented students but there is flexibility in how this evaluation is conducted. State regulations indicate districts may use individual evaluations or group assessment and evaluations to identify gifted and talented children, provided that parental consent is acquired before a child is individually evaluated.

A district may conduct planning and placement team meetings on groups of children for whom evaluation and identification as gifted and talented are planned. Parents must be provided written notice that their child has been referred to the planning and placement team for consideration as a gifted and talented child. Written parental consent shall be secured before a child is individually evaluated for identification as gifted and talented.

The results of the planning and placement team meeting concerning a determination of the child's identification as gifted or talented shall be provided to the parent in writing. If a parent disagrees with the results of the evaluation conducted by the district, the parent has a right to a hearing.

## PA 21-199 Section 2 – Gifted and Talented Students

***(Background information for Policy Review Committee)***

**Page 3**

**(continued)**

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### Group Assessments and Individual Evaluations

In the case of a group assessment, a district may use an appropriate standardized test administered to all students in a particular grade. A district can use a locally normed cut score to identify students for consideration by a PPT for the gifted and talented classification.

In this approach, the district may convene a group PPT to review the cases of the students who meet or exceed the established cut score. The use of local norms over state/national norms has the advantage of potentially being more informative of a child's standing with respect to the general education program of a school. Objective measures such as these also allow for the possible identification of students as gifted and talented who are members of historically underrepresented populations.

When a child is individually referred for gifted and talented identification (e.g., by a teacher, administrator, parent, guardian, child), written consent from a parent or guardian is required before the evaluation and PPT can proceed. An individual referral has the advantage of allowing for the possible identification of students as gifted and talented in areas that are not typically addressed by large-scale standardized tests (e.g., social studies, a technical discipline, music, creative arts, performing arts).

### Role of Local Context in Identification

After the PPT determination from an individual/group assessment the classification of a child as gifted or talented is dependent upon the local context because a PPT must inventory and evaluate a child's needs relative to what is available from the general education program in the child's school.

If a differentiated instruction need exists that exceeds the general education program, then the child has met the criteria for the gifted and talented classification. Since there are differences between general education programs in different schools, a child could be gifted and talented in one school but not gifted and talented in another. Similarly, if the PPT determines that a child has demonstrated or has potential for superior ability/achievement in music, the visual arts or the performing arts and, relative to the general program, the child has unmet educational needs, then the child should be classified as having outstanding talent in the creative arts. Students can be found to have outstanding talent in the creative arts in a single or in multiple modes/expressions of musical, visual, or performing arts. In the case of either the high ability student or the student with outstanding talent in the creative arts, need is operationally defined as whatever is required in order for the student to realize his/her intellectual, creative or specific academic potential.

Connecticut regulations state that "A board of education may identify up to ten per cent of its total student population for the district as gifted and talented." This ten percent criterion is evaluated against the total student population of the district.

## Provision of Services

While the gifted and talented identification and evaluation of students is mandatory, the provision of services for identified students is not required and is left to the discretion of the district. A student may be identified as gifted and talented and as a student with disability who is eligible for special education and related services. In that case, the student would be entitled to an Individualized Education Program (IEP) pursuant to state and federal law but is not entitled to receive gifted and talented services.

## Other Considerations

Although the percentage of students identified and/or served in gifted and talented education programs does not currently reflect the general school population, gifted and talented youth exist in all cultural and economic groups. When appropriate identification protocols are employed along with programming models that cultivate potential, more students from historically underrepresented groups can be identified, resulting in a more equitable process reflective of the national student population. Some students, despite substantial potential, have had few opportunities to develop their talents. Other students have been under challenged with unmet learning needs.

Policy #6172.1, "Gifted and Talented Programs," a mandated policy beginning with the 2022-2023 school year, has been revised and follows for your consideration.

*A mandated policy (as of July 1, 2022) to consider.*

## Instruction

**Gifted and Talented Students Program (Version #1)**

The Board of Education (Board) recognizes its responsibility to identify gifted and talented students within the school district [and to provide these students with appropriate instructional adaptions and services]. (*Districts are required to identify but provision of services is at the discretion of the local district.*) The Board is committed to providing identification and assessment which is responsive to students' economic conditions, gender, developmental differences, disabling conditions and cultural diversity.

For purposes of this policy, "gifted and talented students" means a child identified by the Planning and Placement Team (PPT) as (A) possessing demonstrated or potential abilities that give evidence of very superior intellectual, creative or specific academic capability and (B) needing differentiated instruction or services beyond those being provided in the general education program in order to realize the child's intellectual, creative or specific academic potential. The term shall include children with extraordinary learning ability and children with outstanding talent in the creative arts.

For purposes of this policy "outstanding talent in the creative arts" means a child identified by the Planning and Placement Team as gifted and talented on the basis of demonstrated or potential achievement in music, the visual arts or the performing arts.

The school district shall provide educational programs for the gifted and talented, within budgetary constraints, that include a broad spectrum of learning experiences which increase knowledge and develop skills necessary for the student to function successfully in society while encouraging students to excel in areas of special competence and interest. ***(optional language)***

The Superintendent or his/her designee will develop procedures for an ongoing kindergarten through grade twelve identification process for gifted and talented students that includes multiple measures in order to identify student strengths in intellectual ability, creativity or a specific academic area.

Multiple measures may include, but are not limited to, tests of academic achievement, aptitude, intelligence, and creativity; achievement test scores; grades; student performance or products; samples of student work; parent, student, and/or teacher recommendations; and other appropriate measures. The identification methodology will include consideration of all students, including those who are English language learners and those with Individualized Education Plans (IEP) or 504 Plans, be developmentally appropriate, non-discriminatory, and related to the programs and services offered by the District.

The final determination in the identification of students as gifted and/or talented must be done by a PPT. Such PPT charged with this responsibility shall be composed of a group of certified or licensed professionals representing each of the teaching, administrative and pupil personnel staffs.

# Instruction

**Gifted and Talented Students Program (Version #1)** (continued)

Though early identification of the gifted and talented is important, it is essential that the identification of these students be recognized as a continuing process in that special abilities and skills appear at different times in the lives of many children and new children are regularly being enrolled in the system.

Upon the identification of a student as gifted and talented, the District shall provide electronic notice of such identification to the parent/guardian of such student. Such notice shall include, but need not be limited to:

1. an explanation of how such student was identified as gifted and/or talented;
2. the contact information for the District's employee in charge of the provision of services to gifted and talented students, or, if there is no such employee, the District's employee in charge of the provision of special education and related services;
3. the employee at the State Department of Education who has been designated as responsible for providing information and assistance to Boards of Education and parents or guardians of students related to gifted and talented students, pursuant to section 10-3e of the General Statutes; and
4. any associations in the state that provide support to gifted and talented students.

The school district, should it decide to offer services to the gifted and talented, shall utilize the guidelines, developed and promulgated by the State Department of Education (SDE), for providing services to those students. The guidelines include best practices for the district to consider for (1) addressing the intellectual, social and emotional needs of gifted and talented students in schools and (2) providing teacher training and professional development on gifted and talented students.

Legal Reference: Connecticut General Statutes

10-76a-(e) Definitions.

10-76d-(e) Duties and powers of Boards of Education to provide special education programs and services.

Regulations of Connecticut State Agencies Sections 10-76a-1–10-76l-1.

P.A. 19-184 An Act Concerning the Provision of Special Education.

Gifted and Talented Education: Guidance Regarding Identification and Service. SDE Guidance, March 2019.

P.A. 21-199 An Act Concerning Various Revisions and Additions to the Statutes Relating to Education and Workforce Development, Section 2.

Policy adopted:
rev 6/17
rev 7/19
rev 4/22

POLICY SERVICES

P6172.1(a)

*A mandated policy (as of July 1, 2022) to consider.*

## Instruction

**Gifted and Talented Students Program (Version #2)**

The ______________ Public Schools are committed to recognizing and promoting the individual strengths, gifts, and talents of all children.

The ____________ Public Schools, in conjunction with State of Connecticut regulations and requirements, will identify students demonstrating extraordinary ability academically, creatively and artistically.

The identification process is based on a multi-criteria assessment process, typically including both subjective and objective data. The process must include multiple measures in order to identify student strengths in intellectual ability, creativity or a specific academic area. Multiple measures may include, but are not limited to, tests of academic achievement, aptitude, intelligence, and creativity; achievement test scores; grades; student performance or products; samples of student work; parent, student, and/or teacher recommendation; and other appropriate measures. The identification methodology will include consideration of all students, including those who are English language learners and those with Individualized Education Plans or 504 Plans, be developmentally appropriate, non-discriminatory, and related to the programs and services offered by the District.

The final determination in the identification of students as gifted and/or talented must be done by a Planning and Placement Team (PPT). Such PPT charged with this responsibility shall be composed of a group of certified or licensed professionals representing each of the teaching, administrative and pupil personnel staffs.

It is recognized that identified students may be accommodated in a variety of ways, such as, but not limited to, the provision for supplementary materials, extensions to the curriculum and accelerated placement options.

Upon the identification of a student as gifted and talented, the District shall provide electronic notice of such identification to the parent/guardian of such student. Such notice shall include, but need not be limited to:

1. an explanation of how such student was identified as gifted and talented;
2. the contact information for the District's employee in charge of the provision of services to gifted and talented students, or, if there is no such employee, the District's employee in charge of the provision of special education and related services;
3. the employee at the State Department of Education who has been designated as responsible for providing information and assistance to Boards of Education and parents or guardians of students related to gifted and talented students, pursuant to section 10-3e of the General Statutes; and
4. any associations in the state that provide support to gifted and talented students.

## Instruction

**Gifted and Talented Students Program** (Version #2) (continued)

Legal Reference: Connecticut General Statutes

10-76a-(e) Definitions.

10-76d-(e) Duties and powers of Boards of Education to provide special education programs and services.

Regulations of Connecticut State Agencies Sections 10-76a-1–10-76l-1.

P.A. 19-184 An Act Concerning the Provision of Special Education.

Gifted and Talented Education: Guidance Regarding Identification and Service. SDE Guidance, March 2019.

P.A. 21-199 An Act Concerning Various Revisions and Additions to the Statutes Relating to Education and Workforce Development, Section 2.

Policy adopted:
rev 6/17
rev 7/19
rev 4/22

**BRISTOL PUBLIC SCHOOLS**
**Bristol, Connecticut**

12.03.2025
(Meeting Date)

| | |
|---|---|
| X | **Decision Item** |
| | **Information Item** |

## AGENDA REPORTING FORM

**TOPIC: Appointments to BAIMS Project Building Committees**

**BACKGROUND:**
**Eric Carlson was the BOE liaison to this committee and is no longer a commissioner on the board. The building committee requires a new appointment from the BOE for this vacant position. There will likely be one more meeting to close the project out. This will be a special meeting and is not yet scheduled.**

**COST:** ____________ **FUNDING SOURCE:** ____________

**RECOMMENDATIONS/COMMENTS:**
Please appoint a new commissioner to this building committee.

**ATTACHMENTS:**

**TOPIC PRESENTER:** Tara Landon

**CONTACT NUMBER:** 860-584-7016

**ACTING SUPERINTENDENT:** Ms. Iris White
Iris White

| Bristol Board of Education, Bristol CT | |
|---|---|
| Presented at Board Meeting: | |
| Approved: | |
| Order Filed: | |
| Referred to: | |

**BRISTOL PUBLIC SCHOOLS**
**Bristol, Connecticut**

12.03.2025
(Meeting Date)

| | |
|---|---|
| X | **Decision Item** |
| | **Information Item** |

## AGENDA REPORTING FORM

**TOPIC: Appointments to Edgewood Pre-K Project Building Committees**

**BACKGROUND:**
**Eric Carlson was the BOE liaison to this committee and is no longer a commissioner on the board. The building committee requires a new appointment from the BOE for this vacant position. The meetings are scheduled on the fourth Monday of the month.**

**COST:** ______ **FUNDING SOURCE:** ______

**RECOMMENDATIONS/COMMENTS:**
Please appoint a new commissioner to this building committee.

**ATTACHMENTS:**

**TOPIC PRESENTER:** Tara Landon

**CONTACT NUMBER:** 860-584-7016

**ACTING SUPERINTENDENT:** Ms. Iris White
Iris White

| Bristol Board of Education, Bristol CT | |
|---|---|
| Presented at Board Meeting: | |
| Approved: | |
| Order Filed: | |
| Referred to: | |

**BRISTOL PUBLIC SCHOOLS**
**Bristol, Connecticut**

12.03.2025
(Meeting Date)

| | |
|---|---|
| X | **Decision Item** |
| | **Information Item** |

## AGENDA REPORTING FORM

**TOPIC: Appointments to NEMS Project Building Committees**

**BACKGROUND:**
**Eric Carlson was the BOE liaison to this committee and is no longer a commissioner on the board. The building committee requires a new appointment from the BOE for this vacant position. The meetings are scheduled on the first Tuesday of the month.**

**COST:** ____________ **FUNDING SOURCE:** ____________

**RECOMMENDATIONS/COMMENTS:**
Please appoint a new commissioner to this building committee.

**ATTACHMENTS:**

**TOPIC PRESENTER:** Tara Landon

**CONTACT NUMBER:** 860-584-7016

**ACTING SUPERINTENDENT:** Ms. Iris White
Iris White

| **Bristol Board of Education, Bristol CT** | |
|---|---|
| Presented at Board Meeting: | |
| Approved: | |
| Order Filed: | |
| Referred to: | |

**BRISTOL PUBLIC SCHOOLS**
**Bristol, Connecticut**

09.10.2025
(Meeting Date)

☐ **Decision Item**
☐ **Information Item**

## AGENDA REPORTING FORM

**TOPIC: Appoint BOE Commissioner to the BCHS Roof Replacement Project Committee**

**BACKGROUND:**
In order to form a building committee, the BOE, City Council, and BOF need to appoint a member. These three members make up the nominating committee which nominates the remainder committee members.

**COST:** 8,800,000.00 **FUNDING SOURCE:** State Funding and Bonds

**RECOMMENDATIONS/COMMENTS:**
Appoint a BOE commissioner to the BCHS Roof Replacement Project committee

**ATTACHMENTS:**

**TOPIC PRESENTER:** Tara Landon

**CONTACT NUMBER:** 860-584-7016

**ACTING SUPERINTENDENT:** Ms. Iris White
Iris White

| Bristol Board of Education, Bristol CT | |
|---|---|
| Presented at Board Meeting: | |
| Approved: | |
| Order Filed: | |
| Referred to: | |