

**Board of Education
Newtown, Connecticut**

Minutes of the Board of Education meeting on March 19, 2019 at 7:30 p.m. in the council chambers at 3 Primrose Street.

M. Ku, Chair	L. Rodrigue
R. Harriman-Stites, Vice Chair	J. Evans Davila (absent)
D. Cruson, Secretary	R. Bienkowski
D. Leidlein	2 Staff
J. Vouros	1 Public
A. Clure (absent)	2 Press
D. Delia	

Mrs. Ku called the meeting to order at 7:30 p.m.

Item 1 – Pledge of Allegiance

MOTION: Mrs. Harriman-Stites moved that the Board of Education move the minutes of March 5, 2019 from the consent agenda to new business and remove approval of the Sandy Hook lightning protection project from the agenda. Mr. Vouros seconded.

Mrs. Ku said that Mr. Bienkowski received a letter that the lowest bidder had a change in the subcontractor and the purchasing agent has to show that person the site before making a recommendation.

Motion passes unanimously.

Item 2 – Consent Agenda

MOTION: Mr. Cruson moved that the Board of Education approve the consent agenda which includes the resignations for retirement of J. Petrice DiVanno, Michelle Tenenbaum, and Maryrose Kristopik, and the correspondence report. Mrs. Harriman-Stites seconded. Motion passes unanimously.

Item 3 – Public Participation

Item 4 – Reports

Chair Report: Mrs. Ku attended an EdAdvance meeting where a comprehensive report on facilities in other towns was discussed. The main point was their financial situation which changed due to State funding. They used to rely on Federal and State grants. Also, their director, Dr. Jeff Kitching, was set to attend one of our Board meetings which she was told would be April 2. The Legislative Council public hearing is tomorrow night at 7:00. The education subcommittee will meet Thursday. She, Dr. Rodrigue and Mr. Bienkowski will attend. Also, at their March 27 meeting the Legislative Council will discuss the Board of Education budget.

CABE Day on the Hill is tomorrow. Mrs. Ku was at Region 12 to present a CABE award and saw the site for new agriscience school.

Legislation regarding teachers' pension is shifting to the municipalities. We might want to write a letter as a board regarding this.

Mrs. Harriman-Stites felt as a board we should weigh in on the pension issue and write a letter.

Mr. Delia asked if the lack of funding to EdAdvance would lead to pricing increases.

Mrs. Ku said we just had a price increase that was fairly small.

Dr. Rodrigue said that also included the services of Hanover Research.

Superintendent's Report: Dr. Rodrigue recognized the Rotary Club who honored students last night at their Student of the Month dinner. She thanked them for their ongoing support of this

program which is important to students and families. She also thanked all administrators and staff who attend these dinners. Last week she and Mrs. Ku met with the Board of Realtors regarding our budget and she has been discussing it with parents at PTA meetings. She will attend the high school PTA meeting and parent's breakfast on March 27.

We had one meeting with the Legislative Council subcommittee and were given questions. At a Middle Gate PTA meeting they discussed community and parent engagement as it relates to the budget and in other critical areas. Dr. Rodrigue will solicit input from parents and staff in the community to be part of a new initiative called PEAC which stands for Parent Educator Advisory Council which will begin planning in August. This group will meet quarterly next year with goals related to engagement in the community.

Committee Reports:

Mrs. Harriman-Stites reported that the Policy Committee was moving through the 5000 series and finished the head and concussion policy. They also discussed security policies.

Mr. Cruson reported that the Communications Committee was working on a second newsletter.

Student Representative Reports:

Mr. Morrill reported that spring sports tryouts and practices have begun. Best buddies and unified basketball student leaders set up the Choose to Include campaign which focuses on accepting people of all abilities. Unified basketball sent a team to Mohegan Sun on Saturday to play other unified teams during the half-time of the State basketball championship. Tonight they celebrated with their end of season banquet.

Ms. Dubois shared that the high school was hosting a community service affair tonight to share what opportunities there were to give back to the community. The Annual Day of Silence will be held in April. Over the weekend the Junior Alliance went to Boston to the GVP Summit to speak on gun control issues. The high school production of Mary Poppins is this weekend.

Financial Report:

MOTION: Mr. Cruson moved that the Board of Education approve the financial report for the month ending February 28, 2019. Mrs. Harriman-Stites seconded.

Mr. Bienkowski presented the financial report. We received the first installment of the Excess Cost and Agency Placement Grant based on December data submitted. This is based on a state rate at 75.7% and amounts to \$1,225,910. With this grant, all main object accounts moved to a positive balance position.

Mrs. Harriman-Stites asked if the amount is usually the same for the second payment.

Mr. Beinkowski said the amount may change depending on how many school districts put in claims.

Motion passes unanimously.

Mr. Delia asked if the Board would consider offering SAT help as part of the curriculum. He feels it is critical for students and we assess for it now.

Mrs. Ku said we would have that on a future agenda.

Item 5 – Old Business

MOTION: Mr. Cruson moved that the Board of Education approve the Business Foundations curriculum. Mrs. Leidlein seconded. Motion passes unanimously.

MOTION: Mr. Cruson moved that the Board of Education approve the Personal Financial Literacy curriculum. Mrs. Leidlein seconded. Motion passes unanimously.

MOTION: Mr. Vouros moved that the Board of Education approve the Water Safety Instruction/Lifeguarding Certification course. Mr. Cruson seconded.

Mr. Delia had previously asked the cost of the license.

Dr. Kim Longobucco said the cost is \$38 for the certificate. We will charge \$40 which will include the CPR license and the breathing mask. A student has to be 15 years of age to take the course and obtain certification. The employment age is determined by the group employing the student.

Motion passes unanimously.

Item 6 – New Business

2019-2020 School Calendar:

Dr. Rodrigue spoke about the revised calendar with changes in the appearance and ease of reading the information. There are full professional development days on November 5 and April 3 with that date as a potential floater if we have too many snow days so it would become a full school day. This has been viewed with administrators, staff and PTA presidents. We also added three-hour early dismissals at the start of the school year which makes it an easier transition from summer to a full week of school, it considers the potential for hot days in the buildings and allows additional professional development for staff.

Mr. Delia asked if they discussed not having school January 2 and 3.

Dr. Rodrigue said that did not come up with staff or parents. We tried to keep the 182 days for students and 187 days for teachers.

Mrs. Ku suggested listing the 2-hour dismissals on the October and March conference dates.

Dr. Rodrigue decided to just do a calendar for next year and hold off on the following year because of discussions regarding December 14. We want to be sure all voices are heard.

Mrs. Ku said the calendar with changes would be put on the next agenda.

First Read of Policies:

Mrs. Harriman-Stites spoke about the policies.

Policy 5121.3 is a straightforward policy on academic dishonesty.

Policy 5122 states that the principal has the final say on class placement, addresses transferring students, and addresses credits for home-schooled students.

Policy 5123 worked on the acceleration piece to be in alignment with our current practice.

Policy 5123.3 addresses the parameters about who participates in the graduation ceremony.

Mrs. Harriman-Stites asked Dr. Rodrigue to review the requirements for graduation to be sure they were correct. We might have some changes for the second read.

MOTION: Mrs. Harriman-Stites moved that the Board of Education approve the minutes of March 5, 2019. Mr. Delia seconded. Vote: 5 ayes, 1 abstained (Mr. Cruson)

Item 7 – Public Participation

MOTION: Mr. Cruson moved that the Board of Education go into executive session to discuss personnel matters and invite Dr. Rodrigue. Mrs. Harriman-Stites seconded. Motion passes unanimously.

Item 8 –Executive Session

The Board left executive session at 8:16 p.m.

Item 9 – Possible Vote on Executive Session Items

MOTION: Mr. Cruson moved that the Board of Education support, as recommended by the Superintendent, Abigail Olsen's request pertaining to Article 31.2 of the teacher contract Mrs. Harriman-Stites seconded. Motion passes unanimously.

MOTION: Mr. Cruson moved that the Board of Education support, as recommended by the Superintendent, Amy Deeb's request pertaining to Article 31.2 of the teacher contract. Mrs. Harriman-Stites seconded. Motion passes unanimously.

MOTION: Mr. Cruson moved to adjourn. Mr. Vouros seconded. Motion passes unanimously.

Item 10 – Adjournment

The meeting adjourned at 8:32 p.m.

Respectfully submitted:

Daniel J. Cruson, Jr.
Secretary

MAR 05 2019

43 Jo-Mar Drive
Sandy Hook, CT 06482

Dr. Lorrie Rodrigue
Superintendent of Schools
Newtown Public School District
3 Primrose Street
Newtown, CT 06470

March 4, 2019

Dear Dr. Rodrigue,

This letter shall serve as notification that I will be retiring from my position as sixth grade teacher at Reed Intermediate School, effective June 30, 2019. I understand according to the Newtown Federation of Teachers and Newtown Board of Education Contract, I am required to give at least 45 days notice of my retirement.

It has been an honor and privilege working with the students and fellow Newtown educators for the past 20 years.

Sincerely,

A handwritten signature in cursive script, appearing to read "J. Petrice DiVanno". The signature is written in dark ink and is positioned above the printed name.

J. Petrice DiVanno

cc Anne Uberti, Principal
Suzanne D'Aramo, Director of Human Resources

March 5, 2019

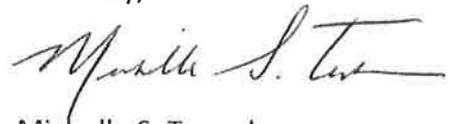
Dear Dr. Rodrigue,

I am writing to notify you that I plan on retiring from my position as music educator at Reed Intermediate School. This will be effective at the end of the current 2018-2019 academic year. I have already informed the principal, Anne Uberti, and fellow staff members of my decision.

It has been my pleasure to work with an extraordinary staff, administration, students, and parents over the years, first at Sandy Hook School and then at Reed Intermediate School. I feel fortunate to have been a music educator in the Newtown school district where the arts are so highly valued.

Thank you for your time.

Sincerely,

A handwritten signature in black ink, appearing to read "Michelle S. Tenenbaum". The signature is fluid and cursive, with a long horizontal stroke at the end.

Michelle S. Tenenbaum

Maryrose Kristopik
934B Heritage Village
Southbury, CT 06488

March 14, 2019

Dr. Lorrie Rodrigue
Superintendent of Schools
Newtown, CT

Dear Dr. Rodrigue,

Please accept this letter as notification of my retirement from Newtown Public Schools at the end of the 2018-19 school year. I have taught grades Pre-K to 12 music in Connecticut public schools for 35 years, the last 16 and a half at Sandy Hook School.

I have enjoyed working with and learning from the talented staff and administration at Sandy Hook and in the district. My fellow music department members are truly amazing musicians and teachers.

I am passionate about what music can do for everyone. It's been a pleasure to share my love and knowledge of music with thousands of our students.

I look forward to joining my husband Jerry, a retired music teacher, as we move on to the next phase of our lives. It is with sadness and joy in my heart that I inform you of my retirement.

Thank you for helping me, the students, and the staff of Newtown, through your hard work in our district.

Sincerely,
Maryrose Kristopik
Music Specialist
Sandy Hook School

Correspondence Report
03/05/2018 – 03/18/2019

Date	Name	Subject
3/7/2019	Lynn Edwards	Lifeguard class at NHS
3/15/2019	Isabella Sousa	Bus #9

AUGUST 5(8)

M	T	W	TH	F
		21	22	23
*26	*27	*28	29	30

21-All Teachers Report
21, 22 & 23 -Staff Development Days
 26 Students Report
 *26, 27, 28--3 hr. Early Dismissal

SEPTEMBER 19(19)

M	T	W	TH	F
--	3	4	5	6
9	10	11	12	13
16	17	18	19	20
23	24	25	26	27
--				

2-Labor Day, Schools Closed
30-Rosh Hashanah-Schools Closed

OCTOBER 22 (22)

M	T	W	TH	F
	1	2	3	*4
7	8	--	10	11
14	15	16	17	18
21	22	23	24	25
28	29	30	31	

***4--2 hr. Delayed Opening-Staff Dev.**
9-Yom Kippur-Schools Closed

NOVEMBER 18(19)

M	T	W	TH	F
				1
4	*--	6	7	8
11	12	13	14	15
18	19	20	21	22
25	26	*27	--	--

***5-Election Day-Schools Closed For Students, Staff Development Day**
***27--2 hr. Early Dismissal -- Thanksgiving**
28-29-Thanksgiving Recess

DECEMBER 15(15)

M	T	W	TH	F
2	3	4	5	6
9	10	11	12	13
16	17	18	19	*20
--	--	--	--	--
--	--			

***20--2 hr. Early Dismissal-- Holiday**
23-31-Holiday Recess

JANUARY 21(21)

M	T	W	TH	F
		--	2	3
6	7	8	9	10
13	14	15	16	*17
--	21	22	23	24
27	28	29	30	31

1-New Year's Day
***17--2 hr. Delayed Opening--Staff Development**
20-Martin Luther King Day, Schools Closed

FEBRUARY 18(18)

M	T	W	TH	F
3	4	5	6	7
10	11	12	13	*14
--	--	19	20	21
24	25	26	27	28

***14--3 hr. Early Dismissal -Staff Dev.**
17-18-Schools Closed

MARCH 22(22)

M	T	W	TH	F
2	3	4	5	6
9	10	11	12	13
16	17	*18	19	20
23	24	25	26	27
30	31			

***18--2 hr. Delayed Opening--Staff Development**

APRIL 15(16)

M	T	W	TH	F
		1	2	*--
6	7	8	9	--
--	--	--	--	--
20	21	22	23	24
27	28	29	30	

*** 3-Schools closed for Students-Staff Development Day**
10 - Good Friday-Schools Closed
13-17- Schools Closed

MAY 20(20)

M	T	W	TH	F
				1
4	5	6	7	8
11	12	13	14	15
18	19	20	21	*22
--	26	27	28	29

***22--3 hr. Early dismissal - Staff Dev.**
25-Memorial Day- Schools Closed

JUNE 7(7)

M	T	W	TH	F
1	2	3	4	5
8	☀9	10	11	12
15	16	17	18	19
22	23	24	25	26
29	30			

☀-Projected last day of school

Student Days - 182
Teacher Days - 187
PLEASE NOTE:
State of Connecticut mandates 180 calendar days for students. Beyond the projected June 9 date, school cancellation days will be made up by adding days through June 30. By Mar. 13 if there are more than 8 cancellations, April 3 will be a full day of school.

Open House Dates:

Elementary - Sept. 4 & 5
 Reed Intermediate - Sept. 12
 Middle School - Aug. 28 gr. 7/Aug. 29 gr. 8
 High School - Sept. 19

Conference Dates/Early Dismissal Times:

Elementary & Reed - Oct. 23, 24 & 25 - Reed 1:32 p.m. / Elem. 1:37 p.m. dismissal....Mar. 19 & 20-Reed 1:32 p.m.
 Elem. 1:37 p.m. dismissal (make-up dates Mar. 26 & 27)
 Middle School - Oct. 23, 24 & 25 - 12:32 p.m. dismissal....Mar. 19 & 20 - 12:32 p.m. dismissal (make-up dates Mar. 26 & 27)
 High School - Nov. 12 & 13 - 12:32 p.m. dismissal....Mar. 19 - 12:32 p.m. dismissal (make-up date Mar. 26)

Adopted:

**NEWTOWN BOARD OF EDUCATION
MONTHLY FINANCIAL REPORT
February 28, 2019**

SUMMARY

This financial report for the month of February indicates that the Board of Education spent approximately \$4.1M; \$3.9M on salaries with the balance of \$0.2M for all other objects.

During this month, the Board of Education received the first installment of the Excess Cost and Agency Placement Grant based on the December data submission. This first receipt is based on a state calculated rate at 75.7% and amounts to \$1,225,910. This revenue now offsets YTD expenditures with the expected balance of \$408,637 scheduled for a May receipt offsetting anticipated obligations. This is subject to change based on changes to expenses since December and State submissions overall.

With this grant receipt, all the main object accounts, including that which contains tuition, have moved to a positive balance position. The positive projection of January has carried into February with a good improvement.

The main areas of change from last month include Salaries, (plus \$13,000); Professional Services,(minus \$10,000); Purchased Property Services, Emergency repairs, (minus \$32,000); Other Purchased Services, Tuition and Transportation (plus \$100,000); and Supplies, Electricity (plus \$21,000).

We are optimistic that these balances will hold until the end of the year, and even improve somewhat.

February revenue receipts included local tuition and other miscellaneous fees.

Ron Bienkowski
Director of Business
March 13, 2019

TERMS AND DEFINITIONS

The Newtown Board of Education's Monthly Financial Report provides summary financial information in the following areas:

- Object Code – a service or commodity obtained as the result of a specific expenditure defined by eight categories: Salaries, Employee Benefits, Professional Services, Purchased Property Services, Other Purchased Services, Supplies, Property, and Miscellaneous.
- Expense Category – further defines the type of expense by Object Code
- Expended 2017-18 – audited expenditures from the prior fiscal year (for comparison purposes)
- Approved Budget – indicates a town approved financial plan used by the school district to achieve its goals and objectives.
- YTD Transfers – identified specific cross object codes requiring adjustments to provide adequate funding for the fiscal period. This includes all transfers made to date.
- Current Transfers – identifies the recommended cross object codes for current month action. (None)
- Current Budget – adjusts the Approved Budget calculating adjustments (+ or -) to the identified object codes.
- Year-To-Date Expended – indicates the actual amount of cumulative expenditures processed by the school district through the month-end date indicated on the monthly budget summary report.
- Encumbered – indicates approved financial obligations of the school district as a result of employee salary contracts, purchasing agreements, purchase orders, or other identified obligations not processed for payment by the date indicated on the monthly budget summary report.
- Balance – calculates object code account balances subtracting expenditures and encumbrances from the current budget amount indicating accounts with unobligated balances or shortages.
- Anticipated Obligation - is a column which provides a method to forecast expense category fund balances that have not been approved via an encumbrance, but are anticipated to be expended or remain with an account balance to maintain the overall budget funding level. Receivable revenue (i.e., grants) are included in this column which has the effect of netting the expected expenditure.

- Projected Balance - calculates the object code balances subtracting the Anticipated Obligations. These balances will move up and down as information is known and or decisions are anticipated or made about current and projected needs of the district.

The monthly budget summary report also provides financial information on the State of Connecticut grant reimbursement programs (Excess Cost and Agency Placement Grants and Magnet Grant Transportation). These reimbursement grants/programs are used to supplement local school district budget programs as follows:

Excess Cost Grant – (Current Formula) this State of Connecticut reimbursement grant is used to support local school districts for education costs of identified special education students whose annual education costs exceed local prior year per pupil expenditure by 4 ½. Students placed by the Department of Child and Family Services (DCF) are reimbursed after the school district has met the prior year's per pupil expenditure. School districts report these costs annually in December and March of each fiscal year. State of Connecticut grant calculations are determined by reimbursing eligible costs (60%-100%) based on the SDE grant allocation and all other town submittals.

Magnet Transportation Grant – provides reimbursement of \$1,300 for local students attending approved Magnet school programs. The budgeted grant is \$52,700 for this year.

The last portion of the monthly budget summary reports school generated revenue that are anticipated revenue to the Town of Newtown. Fees and charges include:

- Local Tuition – amounts the board receives from non-residents who pay tuition to attend Newtown schools. Primarily from staff members.
- High school fees for parking permits..
- The final revenue is miscellaneous fees, which constitute refunds, rebates, prior year claims, etc.

NEWTOWN BOARD OF EDUCATION

2018-19 BUDGET SUMMARY REPORT

FOR THE MONTH ENDING - FEBRUARY 28, 2019

OBJECT CODE	EXPENSE CATEGORY	EXPENDED 2017 - 2018	2018-19		YTD		CURRENT BUDGET	YTD EXPENDITURE	ENCUMBER	BALANCE	ANTICIPATED OBLIGATIONS	PROJECTED BALANCE
			APPROVED BUDGET	TRANSFERS 2018 - 2019	CURRENT TRANSFERS	CURRENT BUDGET						
<u>GENERAL FUND BUDGET</u>												
100	SALARIES	\$ 46,681,657	\$ 48,352,266	\$ (51,880)	\$ -	\$ 48,300,386	\$ 25,749,265	\$ 21,693,129	\$ 857,992	\$ 666,664	\$ 191,327	
200	EMPLOYEE BENEFITS	\$ 11,604,603	\$ 11,165,964	\$ -	\$ -	\$ 11,165,964	\$ 8,302,099	\$ 2,131,588	\$ 732,277	\$ 761,093	\$ (28,816)	
300	PROFESSIONAL SERVICES	\$ 860,328	\$ 823,818	\$ 8,670	\$ -	\$ 832,488	\$ 478,193	\$ 130,282	\$ 224,013	\$ 229,314	\$ (5,301)	
400	PURCHASED PROPERTY SERV.	\$ 1,876,912	\$ 2,175,147	\$ 5,550	\$ -	\$ 2,180,697	\$ 1,705,969	\$ 186,051	\$ 288,678	\$ 314,991	\$ (26,314)	
500	OTHER PURCHASED SERVICES	\$ 8,922,509	\$ 8,939,787	\$ 33,984	\$ -	\$ 8,973,771	\$ 5,655,344	\$ 2,940,948	\$ 377,479	\$ 369,982	\$ 7,497	
600	SUPPLIES	\$ 3,501,034	\$ 3,831,795	\$ 3,676	\$ -	\$ 3,835,471	\$ 2,213,121	\$ 165,079	\$ 1,457,270	\$ 1,417,147	\$ 40,124	
700	PROPERTY	\$ 556,785	\$ 596,247	\$ -	\$ -	\$ 596,247	\$ 281,077	\$ 27,416	\$ 287,754	\$ 288,184	\$ (430)	
800	MISCELLANEOUS	\$ 60,808	\$ 69,207	\$ -	\$ -	\$ 69,207	\$ 57,574	\$ 1,456	\$ 10,177	\$ 8,300	\$ 1,877	
910	SPECIAL ED CONTINGENCY	\$ -	\$ 100,000	\$ -	\$ -	\$ 100,000	\$ -	\$ -	\$ 100,000	\$ -	\$ 100,000	
TOTAL GENERAL FUND BUDGET		\$ 74,064,636	\$ 76,054,231	\$ -	\$ -	\$ 76,054,231	\$ 44,442,642	\$ 27,275,949	\$ 4,335,639	\$ 4,055,675	\$ 279,964	
900	TRANSFER NON-LAPSING	\$ 276,038	\$ -									
GRAND TOTAL		\$ 74,340,674	\$ 76,054,231	\$ -	\$ -	\$ 76,054,231	\$ 44,442,642	\$ 27,275,949	\$ 4,335,639	\$ 4,055,675	\$ 279,964	

(Audited)

NEWTOWN BOARD OF EDUCATION

2018-19 BUDGET SUMMARY REPORT

FOR THE MONTH ENDING - FEBRUARY 28, 2019

OBJECT CODE	EXPENSE CATEGORY	EXPENDED 2017 - 2018	2018-19 YTD		CURRENT BUDGET	CURRENT EXPENDITURE	ENCUMBER	BALANCE	ANTICIPATED OBLIGATIONS	PROJECTED BALANCE
			APPROVED BUDGET	TRANSFERS 2018 - 2019						
100	SALARIES									
	Administrative Salaries	\$ 3,589,381	\$ 3,927,185	\$ -	\$ 3,927,185	\$ 2,461,044	\$ 1,454,983	\$ 11,159	\$ 3,812	\$ 7,347
	Teachers & Specialists Salaries	\$ 30,286,831	\$ 30,663,134	\$ (30,000)	\$ 30,633,134	\$ 15,345,113	\$ 15,272,338	\$ 15,683	\$ (8,000)	\$ 23,683
	Early Retirement	\$ 32,000	\$ 40,000	\$ -	\$ 40,000	\$ 40,000	\$ -	\$ -	\$ -	\$ -
	Continuing Ed./Summer School	\$ 88,754	\$ 93,428	\$ -	\$ 93,428	\$ 69,728	\$ 16,709	\$ 6,991	\$ 5,000	\$ 1,991
	Homebound & Tutors Salaries	\$ 133,352	\$ 218,868	\$ -	\$ 218,868	\$ 86,802	\$ 27,059	\$ 105,008	\$ 46,104	\$ 58,904
	Certified Substitutes	\$ 585,384	\$ 665,815	\$ (13,963)	\$ 651,852	\$ 350,160	\$ 140,095	\$ 161,597	\$ 193,597	\$ (32,000)
	Coaching/Activities	\$ 580,835	\$ 618,223	\$ -	\$ 618,223	\$ 336,507	\$ 8,803	\$ 272,912	\$ 272,912	\$ -
	Staff & Program Development	\$ 175,766	\$ 224,173	\$ (10,000)	\$ 214,173	\$ 114,514	\$ 36,352	\$ 63,307	\$ 61,000	\$ 2,307
	CERTIFIED SALARIES	\$ 35,472,303	\$ 36,450,826	\$ (53,963)	\$ 36,396,863	\$ 18,803,866	\$ 16,956,340	\$ 636,657	\$ 574,425	\$ 62,232
	Supervisors/Technology Salaries	\$ 737,247	\$ 920,240	\$ -	\$ 920,240	\$ 560,572	\$ 316,330	\$ 43,338	\$ 3,511	\$ 39,827
	Clerical & Secretarial salaries	\$ 2,175,395	\$ 2,276,982	\$ -	\$ 2,276,982	\$ 1,371,419	\$ 895,046	\$ 10,517	\$ 10,500	\$ 17
	Educational Assistants	\$ 2,404,167	\$ 2,538,989	\$ 59,053	\$ 2,598,042	\$ 1,484,286	\$ 1,125,849	\$ (12,092)	\$ (595)	\$ (11,497)
	Nurses & Medical advisors	\$ 734,835	\$ 740,251	\$ -	\$ 740,251	\$ 369,297	\$ 348,839	\$ 22,115	\$ 19,500	\$ 2,615
	Custodial & Maint Salaries	\$ 3,034,637	\$ 3,121,867	\$ -	\$ 3,121,867	\$ 1,923,775	\$ 1,182,944	\$ 15,147	\$ 2,000	\$ 13,147
	Non Certified Adj & Bus Drivers salaries	\$ 24,888	\$ 68,670	\$ (56,970)	\$ 11,700	\$ 7,363	\$ 8,017	\$ (3,680)	\$ (2,500)	\$ (1,180)
	Career/Job salaries	\$ 84,244	\$ 74,790	\$ -	\$ 74,790	\$ 5,233	\$ 107,582	\$ (38,025)	\$ (44,932)	\$ 6,907
	Special Education Svcs Salaries	\$ 1,084,834	\$ 1,228,405	\$ -	\$ 1,228,405	\$ 668,348	\$ 510,057	\$ 50,000	\$ (3,582)	\$ 53,582
	Attendance & Security Salaries	\$ 570,324	\$ 591,639	\$ -	\$ 591,639	\$ 336,169	\$ 236,245	\$ 19,225	\$ 3,836	\$ 15,389
	Extra Work - Non-Cert	\$ 91,741	\$ 107,869	\$ -	\$ 107,869	\$ 58,698	\$ 5,883	\$ 43,288	\$ 26,000	\$ 17,288
	Custodial & Maint. Overtime	\$ 234,510	\$ 199,738	\$ -	\$ 199,738	\$ 136,460	\$ -	\$ 63,278	\$ 70,278	\$ (7,000)
	Civic activities/Park & Rec	\$ 32,532	\$ 32,000	\$ -	\$ 32,000	\$ 23,777	\$ -	\$ 8,223	\$ 8,223	\$ -
	NON-CERTIFIED SALARIES	\$ 11,209,354	\$ 11,901,440	\$ 2,083	\$ 11,903,523	\$ 6,945,399	\$ 4,736,789	\$ 221,335	\$ 92,239	\$ 129,096
	SUBTOTAL SALARIES	\$ 46,681,657	\$ 48,352,266	\$ (51,880)	\$ 48,300,386	\$ 25,749,265	\$ 21,693,129	\$ 857,992	\$ 666,664	\$ 191,327

NEWTOWN BOARD OF EDUCATION

2018-19 BUDGET SUMMARY REPORT

FOR THE MONTH ENDING - FEBRUARY 28, 2019

OBJECT CODE	EXPENSE CATEGORY	EXPENDED 2017 - 2018	2018-19		YTD		YTD EXPENDITURE	ENCUMBER	BALANCE	ANTICIPATED OBLIGATIONS	PROJECTED BALANCE
			APPROVED BUDGET	TRANSFERS 2018 - 2019	CURRENT TRANSFERS	CURRENT BUDGET					
200	EMPLOYEE BENEFITS										
	Medical & Dental Expenses	\$ 8,829,256	\$ 8,183,967	\$ -	\$ -	\$ 8,183,967	\$ 6,158,511	\$ 2,008,638	\$ 16,819	\$ 15,806	\$ 1,013
	Life Insurance	\$ 85,000	\$ 87,134	\$ -	\$ -	\$ 87,134	\$ 56,132	\$ -	\$ 31,003	\$ 28,362	\$ 2,641
	FICA & Medicare	\$ 1,454,800	\$ 1,514,790	\$ -	\$ -	\$ 1,514,790	\$ 893,919	\$ -	\$ 620,871	\$ 620,871	\$ -
	Pensions	\$ 683,223	\$ 775,643	\$ -	\$ -	\$ 775,643	\$ 747,045	\$ 2,750	\$ 25,848	\$ 60,548	\$ (34,700)
	Unemployment & Employee Assist.	\$ 53,823	\$ 87,000	\$ -	\$ -	\$ 87,000	\$ 34,706	\$ -	\$ 52,294	\$ 35,506	\$ 16,788
	Workers Compensation	\$ 498,501	\$ 517,430	\$ -	\$ -	\$ 517,430	\$ 411,787	\$ 120,201	\$ (14,558)	\$ -	\$ (14,558)
	SUBTOTAL EMPLOYEE BENEFITS	\$ 11,604,603	\$ 11,165,964	\$ -	\$ -	\$ 11,165,964	\$ 8,302,099	\$ 2,131,588	\$ 732,277	\$ 761,093	\$ (28,816)
300	PROFESSIONAL SERVICES										
	Professional Services	\$ 665,344	\$ 615,047	\$ -	\$ -	\$ 615,047	\$ 344,233	\$ 102,365	\$ 168,449	\$ 176,350	\$ (7,901)
	Professional Educational Ser.	\$ 194,984	\$ 208,771	\$ 8,670	\$ -	\$ 217,441	\$ 133,960	\$ 27,918	\$ 55,564	\$ 52,964	\$ 2,600
	SUBTOTAL PROFESSIONAL SVCS	\$ 860,328	\$ 823,818	\$ 8,670	\$ -	\$ 832,488	\$ 478,193	\$ 130,282	\$ 224,013	\$ 229,314	\$ (5,301)
400	PURCHASED PROPERTY SVCS										
	Buildings & Grounds Services	\$ 707,757	\$ 697,600	\$ -	\$ -	\$ 697,600	\$ 608,910	\$ 66,204	\$ 22,486	\$ 21,460	\$ 1,026
	Utility Services - Water & Sewer	\$ 140,819	\$ 137,650	\$ -	\$ -	\$ 137,650	\$ 81,797	\$ -	\$ 55,853	\$ 61,853	\$ (6,000)
	Building, Site & Emergency Repairs	\$ 490,220	\$ 460,850	\$ -	\$ -	\$ 460,850	\$ 378,087	\$ 36,777	\$ 45,986	\$ 77,986	\$ (32,000)
	Equipment Repairs	\$ 248,481	\$ 313,324	\$ -	\$ -	\$ 313,324	\$ 201,501	\$ 12,248	\$ 99,575	\$ 96,975	\$ 2,600
	Rentals - Building & Equipment	\$ 265,862	\$ 272,923	\$ 5,550	\$ -	\$ 278,473	\$ 185,369	\$ 49,997	\$ 43,108	\$ 42,608	\$ 500
	Building & Site Improvements	\$ 23,773	\$ 292,800	\$ -	\$ -	\$ 292,800	\$ 250,305	\$ 20,825	\$ 21,670	\$ 14,110	\$ 7,560
	SUBTOTAL PUR. PROPERTY SER.	\$ 1,876,912	\$ 2,175,147	\$ 5,550	\$ -	\$ 2,180,697	\$ 1,705,969	\$ 186,051	\$ 288,678	\$ 314,991	\$ (26,314)

NEWTOWN BOARD OF EDUCATION

2018-19 BUDGET SUMMARY REPORT

FOR THE MONTH ENDING - FEBRUARY 28, 2019

OBJECT CODE	EXPENSE CATEGORY	EXPENDED 2017 - 2018	2018-19		YTD		YTD EXPENDITURE	ENCUMBER	BALANCE	ANTICIPATED OBLIGATIONS	PROJECTED BALANCE
			APPROVED BUDGET	TRANSFERS 2018 - 2019	CURRENT TRANSFERS	CURRENT BUDGET					
500	OTHER PURCHASED SERVICES										
	Contracted Services	\$ 570,837	\$ 621,207	\$ 9,534		\$ 630,741	\$ 449,008	\$ 77,283	\$ 104,451	\$ 100,451	\$ 4,000
	Transportation Services	\$ 4,091,115	\$ 4,341,927	\$ (100,000)		\$ 4,241,927	\$ 2,341,820	\$ 1,315,786	\$ 584,321	\$ 508,586	\$ 75,735
	Insurance - Property & Liability	\$ 410,691	\$ 409,907	\$ (5,550)		\$ 404,357	\$ 314,930	\$ 85,528	\$ 3,900	\$ 500	\$ 3,400
	Communications	\$ 159,176	\$ 156,649	\$ -		\$ 156,649	\$ 88,346	\$ 52,037	\$ 16,266	\$ 15,766	\$ 500
	Printing Services	\$ 27,387	\$ 33,020	\$ -		\$ 33,020	\$ 11,215	\$ 11,885	\$ 9,920	\$ 9,920	\$ -
	Tuition - Out of District	\$ 3,454,767	\$ 3,164,101	\$ 130,000		\$ 3,294,101	\$ 2,328,678	\$ 1,343,869	\$ (378,446)	\$ (302,308)	\$ (76,138)
	Student Travel & Staff Mileage	\$ 208,537	\$ 212,976	\$ -		\$ 212,976	\$ 121,348	\$ 54,561	\$ 37,067	\$ 37,067	\$ -
	SUBTOTAL OTHER PURCHASED S	\$ 8,922,509	\$ 8,939,787	\$ 33,984	\$ -	\$ 8,973,771	\$ 5,655,344	\$ 2,940,948	\$ 377,479	\$ 369,982	\$ 7,497
600	SUPPLIES										
	Instructional & Library Supplies	\$ 767,673	\$ 835,997	\$ 4,486		\$ 840,483	\$ 541,625	\$ 83,108	\$ 215,750	\$ 215,750	\$ -
	Software, Medical & Office Sup.	\$ 140,088	\$ 188,341	\$ -		\$ 188,341	\$ 112,642	\$ 35,505	\$ 40,194	\$ 40,194	\$ -
	Plant Supplies	\$ 404,991	\$ 375,000	\$ -		\$ 375,000	\$ 224,775	\$ 41,893	\$ 108,332	\$ 107,184	\$ 1,148
	Electric	\$ 1,305,141	\$ 1,498,260	\$ -		\$ 1,498,260	\$ 809,225	\$ (229)	\$ 689,264	\$ 667,814	\$ 21,450
	Propane & Natural Gas	\$ 304,459	\$ 430,300	\$ -		\$ 430,300	\$ 233,912	\$ -	\$ 196,388	\$ 176,937	\$ 19,451
	Fuel Oil	\$ 321,179	\$ 108,860	\$ -		\$ 108,860	\$ 53,020	\$ -	\$ 55,840	\$ 55,840	\$ -
	Fuel For Vehicles & Equip.	\$ 231,624	\$ 254,618	\$ -		\$ 254,618	\$ 120,766	\$ -	\$ 133,852	\$ 135,777	\$ (1,925)
	Textbooks	\$ 25,880	\$ 140,419	\$ (810)		\$ 139,609	\$ 117,156	\$ 4,802	\$ 17,651	\$ 17,651	\$ -
	SUBTOTAL SUPPLIES	\$ 3,501,034	\$ 3,831,795	\$ 3,676	\$ -	\$ 3,835,471	\$ 2,213,121	\$ 165,079	\$ 1,457,270	\$ 1,417,147	\$ 40,124

NEWTOWN BOARD OF EDUCATION

2018-19 BUDGET SUMMARY REPORT

FOR THE MONTH ENDING - FEBRUARY 28, 2019

OBJECT CODE	EXPENSE CATEGORY	EXPENDED 2017 - 2018	2018-19		YTD		YTD EXPENDITURE	ENCUMBER	BALANCE	ANTICIPATED OBLIGATIONS	PROJECTED BALANCE
			APPROVED BUDGET	TRANSFERS 2018 - 2019	CURRENT TRANSFERS	CURRENT BUDGET					
700	PROPERTY										
	Capital Improvements (Sewers)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Technology Equipment	\$ 547,585	\$ 550,000	\$ -	\$ -	\$ 249,407	\$ 20,439	\$ 280,154	\$ 280,154	\$ -	\$ -
	Other Equipment	\$ 9,200	\$ 46,247	\$ -	\$ -	\$ 31,670	\$ 6,976	\$ 7,601	\$ 8,031	\$ (430)	\$ (430)
	SUBTOTAL PROPERTY	\$ 556,785	\$ 596,247	\$ -	\$ -	\$ 281,077	\$ 27,416	\$ 287,754	\$ 288,184	\$ (430)	\$ (430)
800	MISCELLANEOUS										
	Memberships	\$ 60,808	\$ 69,207	\$ -	\$ -	\$ 57,574	\$ 1,456	\$ 10,177	\$ 8,300	\$ 1,877	\$ 1,877
	SUBTOTAL MISCELLANEOUS	\$ 60,808	\$ 69,207	\$ -	\$ -	\$ 57,574	\$ 1,456	\$ 10,177	\$ 8,300	\$ 1,877	\$ 1,877
910	SPECIAL ED CONTINGENCY	\$ -	\$ 100,000	\$ -	\$ -	\$ 100,000	\$ -	\$ 100,000	\$ -	\$ 100,000	\$ 100,000
TOTAL LOCAL BUDGET		\$ 74,064,636	\$ 76,054,231	\$ -	\$ -	\$ 44,442,642	\$ 27,275,949	\$ 4,335,639	\$ 4,055,675	\$ 279,964	\$ 279,964

(Audited)

NEWTOWN BOARD OF EDUCATION

2018-19 BUDGET SUMMARY REPORT

FOR THE MONTH ENDING - FEBRUARY 28, 2019

OBJECT CODE	EXPENSE CATEGORY	EXPENDED 2017 - 2018	2018-19 APPROVED BUDGET	YTD TRANSFERS 2018 - 2019	CURRENT TRANSFERS	CURRENT BUDGET	YTD EXPENDITURE	ENCUMBER	BALANCE	ANTICIPATED OBLIGATIONS	PROJECTED BALANCE
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<u>BOARD OF EDUCATION FEES & CHARGES - SERVICES</u>		2018-19 APPROVED BUDGET	RECEIVED	BALANCE	% RECEIVED
LOCAL TUITION		\$31,675	\$29,807	\$1,868	94.10%
HIGH SCHOOL FEES FOR PARKING PERMITS		\$20,000	\$20,000	\$0	100.00%
MISCELLANEOUS FEES		\$5,000	\$5,662	(\$662)	113.25%
TOTAL SCHOOL GENERATED FEES		\$56,675	\$55,469	\$1,206	97.87%

NEWTOWN BOARD OF EDUCATION

BUDGET SUMMARY REPORT

"FOR THE MONTH ENDING - FEBRUARY 28, 2019"

OFFSETTING REVENUE INCLUDED IN ANTICIPATED OBLIGATIONS

OBJECT	EXPENSE CATEGORY	BUDGETED	REVISION	REVISED BUDGET	1st ESTIMATE	STATE ESTIMATE	Feb RECEIVED	May ESTIMATED
100	SALARIES	\$ (49,618)	\$ -	\$ (49,618)	\$ (65,366)	\$ (65,974)	\$ (46,857)	\$ (19,117)
200	EMPLOYEE BENEFITS	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
300	PROFESSIONAL SERVICES	\$ (56,105)	\$ -	\$ (56,105)	\$ (13,141)	\$ (13,264)	\$ (5,692)	\$ (7,572)
400	PURCHASED PROPERTY SERV.	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
500	OTHER PURCHASED SERVICES	\$ (1,407,585)	\$ -	\$ (1,407,585)	\$ (1,399,682)	\$ (1,555,309)	\$ (1,173,361)	\$ (381,948)
600	SUPPLIES	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
700	PROPERTY	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
800	MISCELLANEOUS	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL GENERAL FUND BUDGET		\$ (1,513,308)	\$ -	\$ (1,513,308)	\$ (1,478,189)	\$ (1,634,547)	\$ (1,225,910)	\$ (408,637)
100	SALARIES							
	Administrative Salaries	\$ -	\$ -	\$ -	\$ -	\$ -		
	Teachers & Specialists Salaries	\$ -	\$ -	\$ -	\$ -	\$ -		
	Early Retirement	\$ -	\$ -	\$ -	\$ -	\$ -		
	Continuing Ed./Summer School	\$ -	\$ -	\$ -	\$ -	\$ -		
	Homebound & Tutors Salaries	\$ -	\$ -	\$ -	\$ -	\$ -		
	Certified Substitutes	\$ -	\$ -	\$ -	\$ -	\$ -		
	Coaching/Activities	\$ -	\$ -	\$ -	\$ -	\$ -		
	Staff & Program Development	\$ -	\$ -	\$ -	\$ -	\$ -		
	CERTIFIED SALARIES	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Supervisors/Technology Salaries	\$ -	\$ -	\$ -	\$ -	\$ -		
	Clerical & Secretarial salaries	\$ -	\$ -	\$ -	\$ -	\$ -		
	Educational Assistants	\$ (5,326)	\$ -	\$ (5,326)	\$ (8,814)	\$ (8,894)	\$ (7,035)	\$ (1,859)
	Nurses & Medical advisors	\$ -	\$ -	\$ -	\$ -	\$ -		
	Custodial & Maint Salaries	\$ -	\$ -	\$ -	\$ -	\$ -		
	Non Certified Salary Adjustment	\$ -	\$ -	\$ -	\$ -	\$ -		
	Career/Job salaries	\$ -	\$ -	\$ -	\$ -	\$ -		
	Special Education Svcs Salaries	\$ (44,292)	\$ -	\$ (44,292)	\$ (56,552)	\$ (57,080)	\$ (39,822)	\$ (17,258)
	Attendance & Security Salaries	\$ -	\$ -	\$ -	\$ -	\$ -		
	Extra Work - Non-Cert	\$ -	\$ -	\$ -	\$ -	\$ -		
	Custodial & Maint. Overtime	\$ -	\$ -	\$ -	\$ -	\$ -		
	Civic activities/Park & Rec	\$ -	\$ -	\$ -	\$ -	\$ -		
	NON-CERTIFIED SALARIES	\$ (49,618)	\$ -	\$ (49,618)	\$ (65,366)	\$ (65,974)	\$ (46,857)	\$ (19,117)
	SUBTOTAL SALARIES	\$ (49,618)	\$ -	\$ (49,618)	\$ (65,366)	\$ (65,974)	\$ (46,857)	\$ (19,117)
200	EMPLOYEE BENEFITS							
	SUBTOTAL EMPLOYEE BENEFITS	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

"FOR THE MONTH ENDING - FEBRUARY 28, 2019"

OFFSETTING REVENUE INCLUDED IN ANTICIPATED OBLIGATIONS

OBJECT	EXPENSE CATEGORY	BUDGETED	REVISION	REVISED BUDGET	1st ESTIMATE	STATE ESTIMATE	Feb RECEIVED	May ESTIMATED
300	PROFESSIONAL SERVICES							
	Professional Services	\$ (56,105)		\$ (56,105)	\$ (13,141)	\$ (13,264)	\$ (5,692)	\$ (7,572)
	Professional Educational Ser.	\$ -		\$ -		\$ -		
	SUBTOTAL PROFESSIONAL SVCS	\$ (56,105)	\$ -	\$ (56,105)	\$ (13,141)	\$ (13,264)	\$ (5,692)	\$ (7,572)
400	PURCHASED PROPERTY SVCS							
	SUBTOTAL PUR. PROPERTY SER.	\$ -	\$ -	\$ -		\$ -	\$ -	\$ -
500	OTHER PURCHASED SERVICES							
	Contracted Services	\$ -		\$ -		\$ -		
	Transportation Services	\$ (348,975)		\$ (348,975)	\$ (305,446)	\$ (322,416)	\$ (235,737)	\$ (86,679)
	Insurance - Property & Liability	\$ -		\$ -		\$ -		
	Communications	\$ -		\$ -		\$ -		
	Printing Services	\$ -		\$ -		\$ -		
	Tuition - Out of District	\$ (1,058,610)		\$ (1,058,610)	\$ (1,094,236)	\$ (1,232,893)	\$ (937,624)	\$ (295,269)
	Student Travel & Staff Mileage	\$ -		\$ -		\$ -		
	SUBTOTAL OTHER PURCHASED SI	\$ (1,407,585)	\$ -	\$ (1,407,585)	\$ (1,399,682)	\$ (1,555,309)	\$ (1,173,361)	\$ (381,948)
600	SUPPLIES							
	SUBTOTAL SUPPLIES	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
700	PROPERTY							
	SUBTOTAL PROPERTY	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
800	MISCELLANEOUS							
	Memberships							
	SUBTOTAL MISCELLANEOUS	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	TOTAL LOCAL BUDGET	\$ (1,513,308)	\$ -	\$ (1,513,308)	\$ (1,478,189)	\$ (1,634,547)	\$ (1,225,910)	\$ (408,637)

75% 25%

Excess Cost and Agency placement Grants are budgeted at 75%. \$ (1,513,308)

The February State estimate is at 75.71% on eligible expenditures for this year. \$ (1,634,547)

Additional beyond budget \$ 121,239



Collaboration

	Sep				Oct				Nov			Dec			Jan					Feb				Mar				Apr			May					Jun		
Unit:	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38
Economic Decisions and Systems <input checked="" type="checkbox"/>																																						
Information Technology <input checked="" type="checkbox"/>																																						
Foundations of Accounting <input checked="" type="checkbox"/>																																						
Global Business <input checked="" type="checkbox"/>																																						
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38

Strand 1

Economic Principles

Needs vs. Wants

Goods vs. Services

Factors of Production

3 Big Economic Questions

Tradeoffs/Opportunity Costs

Scarcity

Economic Systems

Strand 2

Supply and Demand

Law of Supply

Law of Demand

Shifts in Demand/Supply Graph

Price/Quantity Relationship

Unit Title

Economic Decisions and Systems

Strand 3

Stock Market

Common and Preferred Stocks

Dividends

Bonds

Market Trading

Market Trends

Strand 4

Business as a result of Economics

Business Cycle

Inflation/Deflation

Federal Reserve

*Add strands as needed



Unit Planner: Economic Decisions and Systems Business Foundations

Tuesday, January 22, 2019, 1:43PM

Newtown High School > 2018-2019 > High School > F&AA: Business >
Business Foundations > Week 1 - Week 4

Last Updated: Thursday, June 28, 2018
by Crooke Chelsea

Economic Decisions and Systems

Burgess, Brendan; Chelsea, Crooke; Holst-Grubbe, Erik; Swann, Jolene

- [Unit Planner](#)
- [Lesson Planner](#)

Concept-Based Unit Development Graphic Organizer (Download)

[Unit Web Template \(Optional\)](#)

Concepts / Conceptual Lens

Please attach your completed Unit Web Template here

Systems

[Unit 1 Business Foundations Web.docx](#)

Generalizations / Enduring Understandings

1. The needs and wants of a consumer balance the production of goods and services.
2. The price and quantity set up by the supply and demand graph is assisted by the factors of production and overall market trends.
3. Stocks, bonds, and dividends devise market trading.
4. The business cycle analyzes a business's operations while relating inflation and deflation.
5. Overall scarcity drives the Law of Supply and Law of Demand.

Guiding Questions

Please identify the type of question: (F) Factual, (C) Conceptual, (P) Provocative [Debatable]

1.
 - a. What is the difference between a need and a want? (F)
 - b. Can a good also be a service? (P)
 - c. How can one decide whether they are desiring a need or a want? (C)
 - d. What about consumers needs versus wants influences producers? (C)
2.
 - a. How is supply and demand graphically represented? (F)
 - b. What would an increase in demand do to the equilibrium of quantity and price? (F)
 - c. Why are market trends so important to consider when making business decisions? (C)
 - d. In what ways are the factors of production linked to a business's decision of what quantity to produce and at what price to sell the good or service for? (C)
3.
 - a. What are stocks? (F)
 - b. What is the difference between bonds and stocks? (F)
 - c. What is the better tool, stocks or bonds, for a company to issue? (P)
 - d. How are stocks traded on the stock market? (F)
4.
 - a. What is inflation and deflation? (F)
 - b. Do businesses always have to have a trough in order to experience an expansion? (P)
 - c. What are some things a business can do to recover from a trough? (C)
 - d. Why does the business cycle occur? (C)
5.
 - a. What is scarcity? (F)
 - b. How has scarcity played a role in what quantity of a good or service a business decides to produce? (C)

- c. How are the Law of Supply and Law of Demand similar? Different? (C)
- d. What does the Law of Demand state? (F)

Standard(s)

Connecticut Core Standards / Content Standards

CT: CTE: Business and Finance Technology (2011)

Grades 9-12

Business Management

B. Economics: Assess opportunity costs and trade-offs involved in making choices about how to use scarce and economic resources.

- 24. Define and give examples of economic wants and how they are satisfied.
- 25. Define scarcity and why it requires individuals, governments and societies to make choices.
- 28. Identify questions that might be answered by an economic system (e.g., what is to be produced, how it is to be produced, and for whom it is to be produced).
- 36. Explain the law of demand, law of supply, and equilibrium price.

Personal Finance

D. Saving and Investing: Evaluate savings and investment options to meet short- and long-term goals.

- 15. Describe how the stock market functions.

Objective(s)

Bloom/ Anderson Taxonomy / DOK Language

- Students will be able to differentiate between a need and want and determine its influence on a company's decision to produce a certain amount of goods and services.
- Students will be able to graph a company's supply and demand to represent the price and quantity at which they should produce.
- Students will be able to relate factors of production to the supply and demand of goods and services produced by a business.
- Students will be able to simulate stock market trading using appropriate terminology in the class.
- Students will be able to interpret a business cycle and label the different parts of the cycle accurately.
- Students will be able to determine the outcome of inflation and deflation.
- Students will be able to relate scarcity as reasoning for the Law of Supply and Law of Demand.

Critical Content & Skills

*What students must **KNOW and be able to DO***

- The difference between needs and wants as well as the difference between goods and services.
- The graphical depiction and relationship between supply and demand.
- The factors of production and how they can be applied in a business setting.
- The trading skills and language used in the stock market.
- The reason businesses issue stocks and bonds, and the differences in the two investment tools.
- The characteristics, names, and patterns in a business cycle.
- The outcome of inflation and deflation on a business.
- The meaning of scarcity and how it relates to the definition of Law of Supply and Law of Demand.

Core Learning Activities

- Things to Consider when Running a Business
- Economic Systems Info-graphic Activity
- Understanding the Stock Market Simulation
- Classroom Supply and Demand Graph of Room Cleaning Service
- Supply and Demand with Dog Food
- Imagine This - Can you Survive?
- Economics in Monopoly
- Entrepreneurial Factors of Production in an L.A. Business
- BizCafe Simulation

Assessments

- Business Portfolio: Economic Decisions and Systems**
- Formative: Student Portfolio**
- Economics Decisions and Systems Quiz**

Resources

- Professional & Student*
- Book-
- Intro to Business 6e by Dlabay, Burrow, and Egglund
- Chapters One to Four

Summative: Standardized Test

BizCafe Simulation

Formative: Recital

Students will gather in a round-circle meeting format to discuss updates/progress with their created BizCafe highlighting the areas of the current unit.

Economics Decisions Case Study

Formative: Other oral assessments

Students will read, talk in groups and respond to the case study presented to them. They will highlight the problems currently existing inside the business as well as formulate potential suggestions for the business. They will be required to share at least twice in a class wide discussion.

Case Study Unit One Business Foundations

ISBN: 0-538-44075-9

Investopedia-
Supply
Demand
Law of Supply, Law of Demand
Stocks
Bonds
Dividends
<https://www.investopedia.com/>

Economic Systems Infographic-
<https://www.intelligenteconomist.com/types-of-economies/>

Video on Inflation and Deflation-
<https://www.youtube.com/watch?v=T5seDnLO6M4>

Federal Reserve Background-
https://www.federalreserve.gov/faqs/about_12594.htm

Teachers Pay Teachers-
<https://www.teacherspayteachers.com/>
Understanding the Stock Market (Pawprintables)
Supply & Demand (Sasha Anderson)

Student Learning Expectation & 21st Century Skills

Information Literacy

Critical Thinking

Spoken Communication

Written Performance

- Information Literacy
- Critical Thinking
- Spoken Communication
- Written Performance

Presentation Skills

Interdisciplinary Connections

Social Studies



Unit Title: Information Technology

Conceptual Lens: Interactions

Grade: 9-12

Strand 1

Computer Systems

Mapping a Computer System (Input, Output, Processing, Storage)

Management Information Systems (MIS)

Software vs. Hardware

Workplace Technology

Careers in IT

Dangers of Technology

Strand 2

Databases

Microsoft Access

Data Table (Field, Key, Attribute, Record)

E-R Modeling

Unit Title

Information Technology

Strand 3

Networks

Network Security

Types of Network

Data Transfer Rates

IP Addresses

Strand 4

Social Media

Platforms

E-Business Models

Functions and Goals

***Add strands as needed**



Unit Planner: Information Technology Business Foundations

Tuesday, January 22, 2019, 1:46PM

Newtown High School > 2018-2019 > High School > F&AA: Business >
Business Foundations > Week 5 - Week 9

Last Updated: Thursday, June 28, 2018
by Crooke Chelsea

Information Technology

Burgess, Brendan; Chelsea, Crooke; Holst-Grubbe, Erik; Swann, Jolene

- [Unit Planner](#)
- [Lesson Planner](#)

Concept-Based Unit Development Graphic Organizer (Download)

Unit Web Template (Optional)

Concepts / Conceptual Lens

Please attach your completed Unit Web Template here

Interactions

[Unit 2 Business Foudnations Web.docx](#)

Generalizations / Enduring Understandings

1. In Management Information Systems constructs of mapping a computer system leads to more effective workplace technology.
2. A data table has many parts that are developed by E-R modeling and transfer to Microsoft Access.
3. Various social media platforms assist a business's functions and goals.
4. In order to perform modern day business operations, different network types bring about the proper security and data transfer rates required to perform business operations.

Guiding Questions

Please identify the type of question: (F) Factual, (C) Conceptual, (P) Provocative [Debatable]

1.
 - a. How can constructing a map of a computer system help a business be more efficient? (C)
 - b. What are examples of workplace technology? (F)
 - c. What are the four categories of a computer system? (F)
2.
 - a. What are the various parts that come together to form a data table in a database? (F)
 - b. Can the same two entities within the same business be related in different ways? (P)
 - c. How does E-R modeling help to define the relation of tables within a database? (C)
 - d. What is Microsoft Access? (F)
3.
 - a. What are some social media platforms in which you have seen companies a member of? (F)
 - b. How can social media be a powerful tool in reaching a company's goals? (C)
 - c. Would it be a good idea for businesses to rely on social media to meet all their advertising and marketing goals? (P)
4.
 - a. What are some of the various network types and their purposes? (F)
 - b. How are different network security options more useful in different situations? (F)
 - c. How does the operations and size of a business influence the data transfer rate of their network? (C)

Standard(s)

Connecticut Core Standards / Content Standards

CT: CTE: Business and Finance Technology (2014)

Grades 9-12

Business Management (2014)

Content Standard 8 – Technology and Information Management

Utilize information and technology tools to conduct business effectively and efficiently.

The student will be able to:

Strand 1 Technology Tools

Intermediate: Describe how organizations access, share and protect information.

Strand 2: Information Management

Beginning: Define information management.

Strand 3 E-Business

Beginning: Define e-commerce and Internet-based business operations.

CT: CTE: Business and Finance Technology (2011)

Grades 9-12

Computer Information Systems

A. Impact on Society: Assess the impact of information technology in a global society.

1. Describe the impact of technology on the knowledge and skills needed for success in the workplace.

D. Input Technologies: Use various input technologies to enter and manipulate information appropriately.

6. Develop proper input techniques (e.g., 10-key touch pad, scanning ,digital cameras, and recognition of developing technologies, the use of a touch screen mouse or stylus, speech recognition, student response systems, digital inking, and any new emerging technology)

Objective(s)

Bloom/ Anderson Taxonomy / DOK Language

Students will be able to map a computer system in a sample business to analyze why this would be beneficial to a business.

Students will be able to list the different workplace technologies and decide what part of the computer system they fit into.

Students will be able to develop an E-R model of the relationship between tables and input a table in Microsoft Access.

Students will be able to relate business goals and purpose to an appropriate social media platform that will help the business reach their goals.

Students will be able to define the different types of a network and match the size and type of a business to the most efficient type of network.

Students will be able to discern the language of data transfer rates and based on their needs decide what rate is most appropriate for them.

Critical Content & Skills

*What students must **KNOW and be able to DO***

Perform the tasks to set up a computer system.

Compare the different technologies in computer systems.

Design an E-R model of relationships that they then input in a table.

Decide what social media platform is best for a particular business model.

Contrast different network types,

Determine the required data transfer rates for various business operations.

Core Learning Activities

Internet of Things Project

A Day at the Races Microsoft Access

Application Software

Match the Business Goal/Objective to the Social Media Platform

Prepare a Social Media Platform for DR Sweets and Treats

IT Career Project

Data Transfer Rates Activity

Map a Computer System

Find the IP Address

Network Security Presentation

BizCafe Simulation

Assessments

Business Portfolio: Information Technology

Formative: Student Portfolio

Students will add to their self-created business by highlighting their planned business's information technology.

Resources

Professional & Student

Applications of Technology-

<https://www.forbes.com/sites/robertadams/2017/01/10/10-powerful-examples-of-artificial-intelligence-in-use-today/#37689c3a420d>

Current Events Equifax Data Breach-



Business Foundations Portfolio Directions

Information Technology Quiz

Summative: Standardized Test

Students will respond to 30 questions from throughout the unit.

BizCafe Simulation

Formative: Recital

Students will meet and conduct a discussion of progress they have made in their created Cafe in the area of IT.

DR Sweets and Treats Social Media Platform Proposal

Formative: Group Project

Students will relate the business operations and functions of a fictional business, DR Sweets and Treats, and propose a social media platform that might boost sales and continue the company's growth.



DR Sweets and Treats Assignment and Differentiation Further Assistance

<https://www.usatoday.com/story/money/2017/09/09/equifax-data-breach-could-create-life-long-identity-theft-threat/646765001/>

Video Writing Software-

<https://www.youtube.com/watch?v=QdVFvsCWXRa>

Software vs. Hardware Info-graphic-

<http://www.computercareers.org/>

Microsoft Access Tutorial-

<https://www.gcflearnfree.org/access2016/getting-started-in-access/1/>

E-Business Models-

<https://www.youtube.com/watch?v=PdKas3UAc5o>

Network Standards-

<http://standards.ieee.org/>

Book-

Fundamentals of Database Management Systems

by: Mark L. Gillenson

ISBN: 978-0-471-26297-8

Book-

Foundations of Business 4e

by: Pride, Huges, and Kapoor

ISBN: 978-1-285-19394-6

Teachers Pay Teachers-

Application Software- ORB Education

A Day at the Races- ORB Education

Student Learning Expectation & 21st Century Skills

Information Literacy

Critical Thinking

Spoken Communication

Written Performance

- Information Literacy
- Critical Thinking
- Spoken Communication
- Written Performance

Interdisciplinary Connections

Computer Science



Strand 1

Documents

Income Statement

Balance Sheet

Trial Balance

Statement of Cash Flows

Strand 2

Record Keeping

Double Entry Accounting

Debit vs. Credit

Asset, Liability, and Owner's Equity

Depreciation

Accounting Equation

Transactions

Unit Title

Foundations of Accounting

Strand 3

Management

Managerial Accounting

Decision Making

Cost Analysis

Breakeven Point

Budgeting

Strand 4

*Add strands as needed



Unit Planner: Foundations of Accounting Business Foundations

Tuesday, January 22, 2019, 1:49PM

Newtown High School > 2018-2019 > High School > F&AA: Business >
Business Foundations > Week 10 - Week 13

Last Updated: Thursday, June 28, 2018
by Croke Chelsea

Foundations of Accounting

Burgess, Brendan; Chelsea, Croke; Holst-Grubbe, Erik; Swann, Jolene

- [Unit Planner](#)
- [Lesson Planner](#)

Concept-Based Unit Development Graphic Organizer (Download)

[Unit Web Template \(Optional\)](#)

Concepts / Conceptual Lens

Please attach your completed Unit Web Template here

Balance

[Unit 3 Business Foundations Web.docx](#)

Generalizations / Enduring Understandings

1. A company's Income Statement, Balance Sheet, and Statement of Cash Flows is related to the debit or credit recording keeping completed in a given period of time.
2. All accounts can be assigned to an asset, liability, or owner's equity.
3. Double entry accounting is explained by the accounting equation.
4. Managerial accounting clarifies decision making by performing cost analysis.

Guiding Questions

Please identify the type of question: (F) Factual, (C) Conceptual, (P) Provocative [Debatable]

1.
 - a. How does the format of accounting documents help to relay information to managers and the general public? (C)
 - b. What important accounts are on each of the major accounting documents? (F)
 - c. Which document is most important for the general public when deciding whether the business is successful and shows growth? (P)
2.
 - a. What different accounts fall under assets, liabilities, and owner's equity? (F)
 - b. How are liabilities and owner's equity accounts related? (F)
 - c. What could be a possible process to determine whether a specific account falls under an asset, liability, or owner's equity? (C)
3.
 - a. Why do all the accounts need to balance in the accounting equation? (C)
 - b. Describe the process of recording an entry in a general journal? (C)
 - c. What is the accounting equation that must always have balance? (F)
4.
 - a. What is cost analysis and what are some examples of specific functions performed to analyze costs? (F)
 - b. Why is cost analysis important to a company? (C)
 - c. What is the most effective cost analysis method? (P)

Standard(s)

Connecticut Core Standards / Content Standards

CT: CTE: Business and Finance Technology (2014)

Grades 9-12

Accounting

B. Accounting Principles: Identify and describe generally accepted accounting principles (GAAP/IFRS) and explain how the application of these principles impacts the recording of financial transactions and the preparation of financial statements.

3. Define assets, liabilities, equity, revenue, expenses, gains, and losses.

5. Record transactions affecting accounts receivable, including uncollectible accounts, write-offs, and recoveries.

C. Accounting Process: Complete the various steps of the accounting cycle in order to prepare financial statements.

15. Analyze and describe how basic business transactions impact the accounting equation.

D. Financial Reports: Develop an understanding and working knowledge of financial statements.

18. Describe the users and uses of financial information.

19. Describe the information provided in each financial statement and how the statements relate.

E. Financial Analysis: Access the financial condition and operating results of a company and analyze and interpret financial statements and information to make informed business decisions.

21. Discuss the information that can be obtained from analyzing financial statements.

Objective(s)

Bloom/ Anderson Taxonomy / DOK Language

Students will be able to compare and contrast, as well as interpret, major accounting documents when looking at examples to then make business suggestions.

Students will be able to determine whether an account falls under an asset, liability or owner's equity.

Students will be able to record a double entry accounting transaction to create a Trial Balance for a potential business.

Students will be able to perform a cost analysis activity in which they calculate a method of cost analysis.

Students will be able to formulate a decision for a business based on the figures found in the major accounting documents of a business.

Critical Content & Skills

What students must KNOW and be able to DO

Knowledge of the format and accounts presented on the major accounting documents (Income Statement, Balance Sheet, and Statement of Cash Flows).

Recording transactions under assets, liabilities or owner's equity of a business while maintaining the balance in the accounting equation.

Understanding of what makes an account either an asset, liability, or owner's equity.

Calculate and analyze methods of cost analysis.

Prepare decisions, changes, or suggestions for a business based on the information conveyed in the major accounting documents.

Core Learning Activities

Coffee Shop Simulation of Recording Transactions

Accounting Group Project

Accounting Scenarios (You ain't seen Muffin yet, Back in Business, and Watt's Up)

Interpretations of Audiology Associates Accounting Documents and Proposal

Managerial Accounting for Geno's Furniture Store

BizCafe Simulation

Assessments

Business Portfolio: Foundations of Accounting Formative: Personal Project

This project will be a semester long project students will continue to add to. They will perform operations that will lead to each student creating major financial documents for their self-made business.



Foundations of Accounting Portfolio

Foundations of Accounting Quiz

Summative: Standardized Test

A 20 question quiz in which students will be assessed on their foundation of knowledge in the basic principles

Resources

Professional & Student

Book-

Foundations of Business 4e

by: Pride, Huges, and Kapoor

ISBN: 978-1-285-19394-6

Teachers Pay Teachers-

Accounting Scenarios (Colin Dodds)

Investopedia-

Owner's Equity

<http://www.investopedia.com/terms/e/equity.asp>

Balance Sheet

<https://www.investopedia.com/video/play/5-tips-reading->

of accounting.

Mini Accounting Project

Formative: Group Project

In pairs students will report for a fictional business the account transactions in order to generate a Trial Balance, Balance Sheet, and Income Statement. They will be provided with the properly formatted paperwork.



[Business Foundations Accounting Project.docx](#)

Financial Document Generation

Formative: Self Assessment

Students will complete three mini financial documents based off of business operations and transactions that have occurred.



[0158_001.pdf](#)



[0159_001.pdf](#)



[0160_001.pdf](#)

[balance-sheet/](#)

Video-

Double Entry Accounting

<https://www.youtube.com/watch?v=-7XeZLQ2hYQ>

Trial Balance

<https://www.youtube.com/watch?v=fSDDxBRdEq4>

<https://www.youtube.com/watch?v=ApJlchkkfps>

Student Learning Expectation & 21st Century Skills

Information Literacy

Critical Thinking

Spoken Communication

Written Performance

- Information Literacy
- Critical Thinking
- Spoken Communication
- Written Performance

Interdisciplinary Connections

Math



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Unit Title: Global Business

Conceptual Lens: Interdependence

Grade: 9-12

Strand 1

Social Interactions

Social Responsibility

Ethics

Dress/Greetings

Strand 2

Trading

Deficit vs. Surplus

Trade Restrictions

WTO (World Trade Organization)

Unit Title

Global Business

Strand 3

Operations

Methods of Entering International Business

Advantages

Exports vs. Imports

Multinational Firms

Strand 4

*Add strands as needed



Unit Planner: Global Business Business Foundations

Tuesday, January 22, 2019, 1:52PM

Newtown High School > 2018-2019 > High School > F&AA: Business >
Business Foundations > Week 14 - Week 16

Last Updated: Thursday, June 28, 2018
by Crooke Chelsea

Global Business

Burgess, Brendan; Chelsea, Crooke; Holst-Grubbe, Erik; Swann, Jolene

- [Unit Planner](#)
- [Lesson Planner](#)

Concept-Based Unit Development Graphic Organizer (Download)

Unit Web Template (Optional)

Concepts / Conceptual Lens

Please attach your completed Unit Web Template here

Interdependence

[Unit 4 Business Foundations Web.docx](#)

Generalizations / Enduring Understandings

1. Global ethics is important to cultivate social responsibility in the eyes of consumers across the globe.
2. The World Trade Organization (WTO) enacts trade restrictions between nations.
3. There are many methods of entering international business to ensure success of a multinational firm.
4. Global advantages devise what a nation decides to import or export.

Guiding Questions

Please identify the type of question: (F) Factual, (C) Conceptual, (P) Provocative [Debatable]

1.
 - a. What are the different social responsibility issues that consumers across the globe look at? (F)
 - b. Is it ethical for a business to only focus on some social responsibility issues or should they focus on them all? (P)
 - c. Why is it so important for businesses to consider ethics and social responsibility when conducting business across nation borders? (C)
2.
 - a. What functions does the WTO play in international trade? (F)
 - b. What are some ways in which an import quota could be regulated? (C)
 - c. Why might it be important that an organization like the WTO exists? (C)
3.
 - a. What are some of the methods of entering international business? (F)
 - b. How would a joint venture work in two different countries? (C)
 - c. What is the best method for entering international business for a company looking to become a multinational firm? (P)
4.
 - a. What is the difference between an import and export? (F)
 - b. What are two global advantages a business may have? (F)
 - c. Why might a company with a comparative advantage be successful conducting international business? (C)

Standard(s)

Connecticut Core Standards / Content Standards

CT: CTE: Business and Finance Technology (2014)

Grades 9-12

Business Management (2014)

Content Standard 5 – Ethics and Social Responsibility

Examine the role of ethics and social responsibility in decision making.

The student will be able to:

Strand 1: Examine the role of ethics and social responsibility in decision making.

Beginning: *Define business ethics and social responsibility.

Strand 4: Analyze quality standards.

Advanced: Explain why high quality and efficiency standards are necessary to compete in the global marketplace.

Content Standard 12 – Global Perspective

Examine the issues of corporate culture and managing in the global environment.

The student will be able to:

Strand 1: Analyze legal issues.

Advanced: Examine the impact of laws and regulations governing global business within various countries and regions of the world.

Strand 2: Analyze economic considerations.

Beginning: Identify global economic factors.

Strand 4: Understand global partnering.

Intermediate: Define forms of global partnering (e.g., licensing, joint ventures, exporting, importing and franchising).

Objective(s)

Bloom/ Anderson Taxonomy / DOK Language

Students will be able to apply social responsibility methods to a potential business.

Students will be able to define ethics and provide researched reasoning for why ethics is critical to a business's success.

Students will be able to report on the WTO and present restrictions that exist between nations.

Students will be able to select a method of entering international business by weighing pros and cons for a potential business looking to expand.

Students will be able to differentiate between an import and export by looking at example scenarios.

Students will be able to discern types of advantages companies have on the global market place by providing reasoning.

Critical Content & Skills

*What students must **KNOW and be able to DO***

Knowledge of types of social responsibilities an organization can have.

Ethics and how it plays a role in business success.

Describe and relate to restrictions set and monitored by the WTO.

Compare and contrast the various methods of entering international business.

Evaluate whether an international business operation is an export or an import.

Separate types of advantages.

Core Learning Activities

Current Event in the WTO

International Shark Tank

Business Ethics Debate

Is it an import or export?

Global Business Partner Project

Global Business Final Case Study

BizCafe Simulation

Assessments

Business Portfolio

Formative: Personal Project

Students will add to their already created portfolio with potential plans for their self-created business to expand outside of national borders.

Global Business Quiz

Resources

Professional & Student

WTO Organization-

https://www.wto.org/english/news_e/news_e.htm

<https://www.wto.org/>

Book-

Summative: Standardized Test

This 20 question quiz will question students on the process of conducting a business internationally as well as some of the restrictions of conducting international business.

Ethical or Not Debate**Formative: Other oral assessments**

Students will have to formulate a decision based on the information they have researched and using the definition of ethics to defend their decision in a debate where each student will have to participate at least twice in debate formatted classroom.



[Copy of PROJECT: Ethical or Not? \(#2\)](#)

Global Business Project**Formative: Group Project**

This project will highlight trade laws, information about exports and imports, and typical business practices in countries from around the world.



[Global Business Project](#)

Foundations of Business 4e

by: Pride, Huges, and Kapoor

ISBN: 978-1-285-19394-6

Book-

Intro to Business 6e by Dlabay, Burrow, and Egglund

ISBN: 0-538-44075-9

Next Gen Personal Finance

Ethical or Not? Debate

<https://www.ngpf.org/curriculum/bonus/projects/>

Student Learning Expectation & 21st Century Skills

Information Literacy

Critical Thinking

Spoken Communication

Written Performance

- Information Literacy
- Critical Thinking
- Spoken Communication
- Written Performance

Interdisciplinary Connections

Social Studies



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Collaboration

	Sep				Oct				Nov			Dec			Jan					Feb				Mar				Apr			May					Jun		
Unit:	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38
Planning For Your Future <input checked="" type="checkbox"/>	█																																					
Establishing Your Financial Footprint <input checked="" type="checkbox"/>					█																																	
Balancing Credit to Minimize Debt <input checked="" type="checkbox"/>										█																												
Recognizing Investment Strategies for Life Stages <input checked="" type="checkbox"/>													█																									
Develop a Budget for Living Independently <input checked="" type="checkbox"/>																█																						



Unit Planner: Planning For Your Future Personal Financial Literacy

Tuesday, January 22, 2019, 2:03PM

Newtown High School > 2018-2019 > High School > F&AA: Business >
Personal Financial Literacy > Week 1 - Week 3

Last Updated: Wednesday, June 27, 2018 by Jolene Swann

Planning For Your Future

Burgess, Brendan; Chelsea, Crooke; Holst-Grubbe, Erik; Swann, Jolene

- [Unit Planner](#)
- [Lesson Planner](#)

Concept-Based Unit Development Graphic Organizer (Download)

[Unit Web Template \(Optional\)](#)

Concepts / Conceptual Lens

Please attach your completed Unit Web Template here

Conceptual Lens- Critical Analysis

Unit Strands:

- Strand 1- Career Exploration
 - Careers
 - Industries
 - Compensation
 - Applications
- Strand 2- Budget Basics
 - Needs and Wants
 - Values
 - Money Management
 - Income
- Strand 3- Establishing Values and Goals
 - Interests
 - Personal Background
 - SMART Goals
- Strand 4- Living Independently
 - Housing Costs
 - Transportation Costs
 - Financial Decisions
 - Financial Goals
 - Educational Systems

Generalizations / Enduring Understandings

1. Researching types of industries can lead to a fulfilling career that offers adequate compensation.
2. Establishing personal values correlates to regulating needs and wants.
3. An individuals budget is achieved through money management and their income.
4. Personal backgrounds shape ones interest which are used to formulate SMART goals.
5. In order to live independently, housing and transportation costs must be identified to meet

Guiding Questions

Please identify the type of question: (F) Factual, (C) Conceptual, (P) Provocative [Debatable]

1.
 - a. Does researching careers in high school lead to a higher compensation post graduation? (P)
 - b. What can be done to identify possible career paths? (F)
 - c. How does education impact earnings? (C)
2.
 - a. Are wants and needs the same for everyone? (P)
 - b. Do your values impact where you spend your money?

financial goals.

(F)

c. Does proper money management improve your overall well being? (C)

3.

a. Is a large income necessary to have positive money management practices? (P)

b. What are the categories used in a personal budget? (F)

c. How does an individual obtain a budget surplus? (F)

4.

a. Do we all share the same fundamental values? (P)

b. How are our values influenced? (F)

c. Why do our values change? (C)

5.

a. Which categories of a budget should have the largest allocation of funds? (F)

b. What are the costs and responsibilities of living independently? (F)

c. How do people obtain financial goals? (C)

Standard(s)

Connecticut Core Standards / Content Standards

CT: CTE: Business and Finance Technology (2011)

Grades 9-12

Personal Finance

A. Personal Decision Making: Use a rational decision-making process as it applies to the roles of citizens, workers, and consumers.

1. Define and give examples of economic wants and needs.

2. Apply the steps in a rational decision-making process to a situation involving an economic decision by an individual.

3. Analyze the effects of ethics on business and financial management decisions.

B. Earning and Reporting Income: Identify various forms of income and analyze factors that affect income as a part of the career decision-making process.

4. Calculate net pay.

C. Managing Finances and Budgeting: Develop and evaluate a budget plan.

7. Define fixed and variable expenses.

8. Categorize and classify expenses as fixed or variable.

9. Determine discretionary income in a budget plan.

D. Saving and Investing: Evaluate savings and investment options to meet short- and long-term goals.

10. Describe why and how people save.

Objective(s)

Bloom/ Anderson Taxonomy / DOK Language

Students will be able to research job industries and compare compensation.

Students will be able to identify values that influence their financial goals.

Students will be able to create SMART goals based on their financial goals.

Students will research transportation options that meet their financial situation.

Students will research housing options that meet their financial situation.

Students will create budgets based on different income levels.	
<p>Critical Content & Skills</p> <p><i>What students must KNOW and be able to DO</i></p> <p>Each industry has certain income potential. Financial goals are influenced and created using values. SMART goals are linked to financial goals. Financial situations affect transportation and housing options. Budgets are created for all income levels.</p>	<p>Core Learning Activities</p> <ul style="list-style-type: none"> • Student activity guide • Goal Setting with Values activity • How Should Ethan Spend his Money activity • Roll Out My Future Activity
<p>Assessments</p> <p>Money Interview Formative: Personal Project Students interview an adult about the influence of money in their lives. Students then write a reflection about what they learned.</p> <p>Collage Budget Project Formative: Visual Arts Project Students research a career, living expenses, personal spending categories and financial goals. They then create a digital collage that represents their future spending.</p>	<p>Resources</p> <p><i>Professional & Student</i></p> <ul style="list-style-type: none"> • Next Gen Personal Finance (www.ngpf.org) <ul style="list-style-type: none"> ○ How Should Ethan Spend his Money? ○ Roll Out My Future • State of New Jersey Department of Education <ul style="list-style-type: none"> ○ Values, Goals ad Financial Decisions Lesson
<p>Student Learning Expectation & 21st Century Skills</p> <p><u>Information Literacy</u> <u>Critical Thinking</u> <u>Spoken Communication</u> <u>Written Performance</u></p>	<p>Interdisciplinary Connections</p> <p>Career Center School Counseling Department Math Department</p>





Unit Planner: Establishing Your Financial Footprint Personal Financial Literacy

Tuesday, January 22, 2019, 2:05PM

Newtown High School > 2018-2019 > High School > F&AA: Business >
Personal Financial Literacy > Week 4 - Week 7

Last Updated: Wednesday, June 27, 2018 by Jolene Swann

Establishing Your Financial Footprint

Burgess, Brendan; Chelsea, Crooke; Holst-Grubbe, Erik; Swann, Jolene

- [Unit Planner](#)
- [Lesson Planner](#)

Concept-Based Unit Development Graphic Organizer (Download)

Unit Web Template (Optional)

Concepts / Conceptual Lens

Please attach your completed Unit Web Template here

Conceptual Lens- Systems

Unit Strands:

Strand 1- Taxes

- Tax documents
- Types of taxes
- Filing taxes

Strand 2- Checking Accounts

- Financial institutions
- Using a checking account
- Account safety

Strand 3- Savings Accounts

- Financial institutions
- Savings account options
- Earning interest

Generalizations / Enduring Understandings

1. Completing legally required tax documents establishes proper systems of compensation.
2. Differentiating between types of taxes creates educated tax payers.
3. Establishing the use of checking and savings accounts allows for optimal management of finances.
4. Understanding how interest is earned demonstrates how to achieve financial goals.
5. Creating safeguards for financial accounts decreases risk when using financial institutions.

Guiding Questions

Please identify the type of question: (F) Factual, (C) Conceptual, (P) Provocative [Debatable]

1.
 - a. What are the required tax documents that income earners must file? (F)
 - b. Why do governments tax citizens? (C)
 - c. Does not completing tax documents increase earnings? (P)
2.
 - a. What are the different types of taxes? (F)
 - b. Why are taxes paid? (C)
 - c. Does not paying taxes benefit in the long term? (P)

3.
 - a. Why are financial institutions used? (C)
 - b. What is required to open a checking or savings account? (F)
 - c. Does having a checking and/or savings account allow for better management of finances? (P)
4.
 - a. Why is interest earned? (C)
 - b. What types of interest do financial institutions implement? (F)
 - c. Are interest earning financial accounts better? (P)
5.
 - a. Why are safeguards necessary? (C)
 - b. What are the ways in which accounts can be compromised? (F)
 - c. Financial institutions provide the necessary safeguards for financial accounts? (P)

Standard(s)

Connecticut Core Standards / Content Standards

CT: CTE: Business and Finance Technology (2014)

Grades 9-12

Accounting

B. Accounting Principles: Identify and describe generally accepted accounting principles (GAAP/IFRS) and explain how the application of these principles impacts the recording of financial transactions and the preparation of financial statements.

4. Describe methods for controlling and safeguarding cash.

Personal Finance

B. Earning and Reporting Income: Identify various forms of income and analyze factors that affect income as part of the career decision-making process.

6. Identify benefits as a component of total income.

F. Banking and Financial Institutions: Evaluate services provided by financial deposit institutions to transfer funds.

17. Identify the rights and responsibilities associated with using a checking account.

18. Differentiate among types of electronic monetary transactions offered by various financial institutions.

19. Evaluate products and services and related costs associated with financial institutions in terms of personal banking needs.

20. Describe and demonstrate the steps involved in the bank reconciliation process.

CT: CTE: Business and Finance Technology (2011)

Grades 9-12

Business Management

B. Economics: Assess opportunity costs and trade-offs involved in making choices about how to use scarce and economic resources.

43. Differentiate between local, state, and federal tax receipts and expenditures.

Objective(s)

Bloom/ Anderson Taxonomy / DOK Language

Students will be able to correctly complete the necessary tax forms that are required for employment.
Students will identify the different types of taxes.
Students will understand the tax cycle.
Students will complete the tax forms required to file end of year taxes.
Students will be able to identify financial institutions.
Students will understand how to use a checking account and all its functions.
Students will be able to identify the different types of savings tools.
Students will understand how interest is applied to their financial accounts.
Students will understand how to safeguard their financial accounts.

Critical Content & Skills
*What students must **KNOW and be able to DO***
Tax forms are legally required for employment.
There are many types of taxes that are paid and collected.
The tax cycle is used by all income earners.
Tax forms are filed at the end of the tax cycle each year.
Financial institutions are used continuously throughout life.
Checking accounts have many different functions and uses.
There are many savings tools that can be used to meet financial goals.
Financial accounts can earn interest.
Safeguarding financial accounts is essential for financial management.

- Core Learning Activities**
- Student Activity Packet
 - Understanding Your Paycheck Activity
 - Research the Tax Cycle
 - Tax Forms and Their Purpose
 - Complete a 1040EZ
 - Complete a W-4 Form
 - Reconcile Your Checkbook
 - Completing and Recording Checking Account Transactions
 - Online and Mobile Banking Activity
 - Compare: Types of Savings Accounts
 - Analyze: Saving for Retirement
 - Calculate: How to Save

Assessments
Work and Taxes Project
Summative: Other written assessments
Students complete a timeline that walks a person through the application process for a job, a full yer of employment and filing taxes at the end of the year.
Checking and Savings Test
Summative: Written Test
Written test

- Resources**
Professional & Student
- Next Gen Personal Finance (www.ngpf.org)
 - Understanding Your Paycheck Activity
 - Research the Tax Cycle
 - Tax Forms and Their Purpose
 - Reconcile Your Checkbook
 - Completing and Recording Checking Account Transactions
 - Compare: Types of Savings Accounts
 - Analyze: Saving for Retirement
 - Calculate: How to Save

Student Learning Expectation & 21st Century Skills
Information Literacy
Critical Thinking
Spoken Communication
Written Performance

Interdisciplinary Connections
Career Center
Local bank (Newtown Savings Bank)
Math Department





Unit Planner: Balancing Credit to Minimize Debt

Personal Financial Literacy

Tuesday, January 22, 2019, 2:06PM

Newtown High School > 2018-2019 > High School > F&AA: Business > Personal Financial Literacy > Week 8 - Week 11

Last Updated: Wednesday, June 27, 2018
by Brendan Burgess

Balancing Credit to Minimize Debt

Burgess, Brendan; Chelsea, Crooke; Holst-Grubbe, Erik; Swann, Jolene

- [Unit Planner](#)
- [Lesson Planner](#)

Concept-Based Unit Development Graphic Organizer (Download)

Unit Web Template (Optional)

Concepts / Conceptual Lens

Please attach your completed Unit Web Template here

Conceptual Lens: Perspective

Unit Strands:

- Strand 1- Types of Credit
 - Advantages of credit
 - Disadvantages of credit
 - Credit usage
 - Sources of credit
- Strand 2- Paying for College
 - Educational funding methods
 - College expenses
 - Choosing a school
 - Loan repayment
- Strand 3- Managing Credit
 - The cost of credit
 - Applying for credit
 - Safeguarding accounts
 - Managing debt

Generalizations / Enduring Understandings

1. Using credit wisely creates balance and financial well being.
2. Understanding sources of credit and situations in which credit should be used is essential to drive financial decisions.
3. Individual situations drive educational funding decisions.
4. Developing criteria for choosing colleges is essential to plan for expenses that will be obtained.
5. Credit is used to pay for essential life needs.
6. Calculating the cost of credit regulates debt to fit financial needs.
7. Creating safeguards for financial accounts decreases risk when using credit.

Guiding Questions

Please identify the type of question: (F) Factual, (C) Conceptual, (P) Provocative [Debatable]

1.
 - a. Why is credit used? (C)
 - b. Can credit enhance financial well being? (P)
 - c. What are the steps to use credit wisely? (F)
2.
 - a. When can credit be used to make purchases? (F)
 - b. Why is credit offered by many sources? (C)
 - c. Should credit be avoided? (P)
3.
 - a. What are sources that can be used to pay for college? (F)
 - b. Why do funding sources give money to people? (C)
 - c. Is college a necessary step in life? (P)

4.
 - a. What are criteria used in choosing a college? (F)
 - b. What are the typical expenses associated with paying for college? (F)
 - c. Why is education expensive? (C)
 - d. Is planning financially for college necessary? (P)

5.
 - a. What can be purchased using credit? (F)
 - b. Why is using credit a better option than using cash? (P)
 - c. Why is credit used? (C)

6.
 - a. How can the cost of credit be calculated? (F)
 - b. Why does credit allow for financial needs to be met? (C)
 - c. Can using credit create a higher level of financial well being? (P)

7.
 - a. Why are safeguards necessary? (C)
 - b. What are the ways in which credit accounts can be compromised? (F)
 - c. Do credit sources provide the necessary safeguards for accounts? (P)

Standard(s)

Connecticut Core Standards / Content Standards

CT: CTE: Business and Finance Technology (2014)

Grades 9-12

Personal Finance

G. Using credit: Analyze factors that affect the choice of credit, the cost of credit, and the legal aspects of using credit.

21. Describe the risks and responsibilities associated with using credit.
22. Identify and explain methods of establishing and maintaining a good credit rating.
23. Explain credit ratings and credit reports and describe why they are important to consumers.
24. Identify specific steps that consumers can take to minimize their exposure to identity theft.

CT: CTE: Business and Finance Technology (2011)

Grades 9-12

Personal Finance

G. Using credit: Analyze factors that affect the choice of credit, the cost of credit, and the legal aspects of using credit.

41. Describe the process of borrowing to purchase of goods and services.
42. Describe the risks and responsibilities associated with using credit.
43. Identify the opportunity cost of credit decisions.
44. Identify methods of establishing and maintaining a good credit rating.
45. Determine the advantages and disadvantages of using credit.
46. Describe the various methods of financing a purchase.
47. Describe interest as a cost of credit and explain why it is charged.

48. Describe the importance of a sound credit rating.
49. Analyze credit card features and their impact on personal financial planning.
50. Explain why an interest rate varies with the amount assumed risk.
51. Explain credit ratings and reports and describe why they are important to consumers.
52. Describe examples of the benefits of financial responsibility and the costs of financial irresponsibility.
53. Identify strategies for effective debt management.
54. Describe the process of borrowing to purchase of goods and services.
55. Identify the components listed on a credit report and explain how that information is used and is received by and reported from the credit reporting agencies.
56. Identify specific steps that consumers can take to minimize their exposure to identity theft.
60. Explain the implications of bankruptcy.
61. Compare and contrast the various aspects of credit cards (e.g., APR, grace period, incentive buying, methods of calculating interest, and fees).

Objective(s)

Bloom/ Anderson Taxonomy / DOK Language

- Students will understand how to apply for and use sources of credit.
- Students will identify the advantages and disadvantages of using credit.
- Students will know when it is appropriate to use credit in order to make financial decisions that enhances financial well being.
- Students will identify sources of funding that can be used to pay for college expenses.
- Students will understand what expenses are associated with college.
- Students will research colleges that fit their educational and financial goals.
- Students will understand how to apply for and re-pay college loans.
- Students will identify the overall cost of using credit.
- Students will understand the steps needed to apply for credit.
- Students will identify common risks associated with using credit.
- Students will understand how to effectively manage debt to meet their financial goals.

Critical Content & Skills

*What students must **KNOW and be able to DO***

- Credit must be applied for in order to use it to make purchases.
- There are many sources of credit.
- Each type of credit has advantages and disadvantages.
- Credit can be used to make financial decisions and enhance financial well being.
- College expenses can be paid for through many sources.
- There are many expenses associated with paying for college.
- Researching colleges is an essential step in preparing for post secondary education.
- Applying for college loans is a process and repayment must be taken into consideration when selecting an option,
- There are costs and risks to using each type of credit.
- Before using and managing debt, each type of credit must be applied for and approved.

Core Learning Activities

- Student Activity Packet
- Analyze: Student Loan Decision Making
- Interactive: Questions to Ask Before Picking a College
- Research Scholarships Activity
- Shopping with Interest Activity
- Understanding Credit Agreements Activity
- Research and Select a Credit Card Activity

Assessments

Paying for College Parent Discussion

Formative: Narrative Writing Assignment

Students prepare to discuss college expenses with their parents/ guardian and then have that discussion and reflect on the discussion as a step toward preparing for college expenses.

Guide to Credit Project

Summative: Other Visual Assessments

Students will research Mortgages and car loans and create guide that presents their research.

Guide to Credit Assessment

Summative: Written Test

This assessment covers the topics assigned for the guide to credit project.

Resources

Professional & Student

- Next Gen Personal Finance (www.ngpf.org)
 - Analyze: Student Loan Decision Making
 - Interactive: Questions to Ask Before Picking a College
 - Research Scholarships Activity
 - Shopping with Interest Activity
 - Understanding Credit Agreements Activity
 - Research and Select a Credit Card Activity

Student Learning Expectation & 21st Century Skills

Information Literacy

Critical Thinking

Spoken Communication

Written Performance

Interdisciplinary Connections

- Local Bank (Newtown Savings Bank)



Atlas Version 9.3.5

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Unit Planner: Recognizing Investment Strategies for Life Stages

Personal Financial Literacy

Tuesday, January 22, 2019, 2:07PM

Newtown High School > 2018-2019 > High School > F&AA: Business > Personal Financial Literacy > Week 12 - Week 15

Last Updated: Thursday, June 28, 2018
by Brendan Burgess

Recognizing Investment Strategies for Life Stages

Burgess, Brendan; Chelsea, Croke; Holst-Grubbe, Erik; Swann, Jolene

- [Unit Planner](#)
- [Lesson Planner](#)

Concept-Based Unit Development Graphic Organizer (Download)

Unit Web Template (Optional)

Concepts / Conceptual Lens

Please attach your completed Unit Web Template here

Conceptual Lens: Systems

Unit Strands:

- Strand 1: Implementing Investment Strategies
 - Types of investments
 - Diversification
 - Components of risk
 - Resources for investing
- Strand 2: Long and Short Term Goals
 - Short term investments
 - Long term investments
 - Interest rate
 - Rate of return
- Strand 3: Financial Planning for Retirement
 - Identifying retirement needs
 - Retirement income
 - Types of retirement investments
 - Retirement costs

Generalizations / Enduring Understandings

1. Understanding the types of investments encourages sound investment and informed financial decisions.
2. Diversifying investment options creates balance, promotes asset growth, and reduces risk.
3. Using investment resources guides income to maximize earning power to meet financial goals.
4. Differentiating between long and short term goals drive investment decisions.
5. Interpreting the relationship between interest rates and the rate of return increases earning potential.
6. Analyzing retirement investment options facilitates accumulation of adequate funds for retirement goals.
7. Estimating the costs of retirement allows achievement of necessary funds to retire comfortably.

Guiding Questions

Please identify the type of question: (F) Factual, (C) Conceptual, (P) Provocative [Debatable]

1.
 - a. What types of investments are available? (F)
 - b. Why do people invest? (C)
 - c. Which type of investment is the most successful? (P)
2.
 - a. How can an investment portfolio be diversified? (F)
 - b. Why do people diversify? (C)
 - c. Can risk be eliminated when investing? (P)
3.
 - a. What are investing resources? (F)
 - b. Why do investment resources help with investing? (C)
 - c. Which investment resource achieves the highest rate of return? (P)

4.
 - a. What are the differences between short and long term investing? (F)
 - b. How do goals change throughout life? (C)
 - c. How are the advantages of long term investing better than short term investing? (P)

5.
 - a. How does the interest rate affect the rate of return? (F)
 - b. Why are interest rates used? (C)
 - c. How is the interest rate the most important factor of some investments? (P)

6.
 - a. What types of financial tools can employed to meet retirement goals? (F)
 - b. How do people retire? (C)
 - c. How much money is needed for retirement? (P)

7.
 - a. What are the costs of retirement? (F)
 - b. Why do people save for retirement? (C)
 - c. What strategy allows people to retire comfortably financially? (P)

Standard(s)

Connecticut Core Standards / Content Standards

CT: CTE: Business and Finance Technology (2014)

Grades 9-12

Personal Finance

D. Saving and Investing: Evaluate savings and investment options to meet short- and long-term goals.

9. Explain how and why the stock market works.
10. Analyze the power of compounding and the importance of starting early in implementing a plan of saving and investing.
11. Describe the advantages and disadvantages of various savings and investing plans.
12. Explain the role of savings and investing in creating a financial plan.

CT: CTE: Business and Finance Technology (2011)

Grades 9-12

Personal Finance

D. Saving and Investing: Evaluate savings and investment options to meet short- and long-term goals.

12. Differentiate between saving and investing.
14. Explain reasons for changes in a savings and investing plan as one proceeds through the life cycle.
16. Identify the risk/return trade-offs for saving and investing.
18. Examine the fundamental workings of the Social Security System and the system's effects on retirement planning.

Objective(s)

Bloom/ Anderson Taxonomy / DOK Language

- Students will identify the types of investments and how they work through research.
- Students will be able to diversify a portfolio to create a balanced investment strategy and reduce risk.
- Students will research investment resources that can be used to invest future income.

Students will compare and contrast the benefits of long and short term investing.
 Students will understand the relationship between interest rates and the rate of return on investments through investing simulation.
 Students will analyze investment options for retirement that meet financial goals through research.
 Students will estimate how much money is required to retire comfortably.

Critical Content & Skills

*What students must **KNOW and be able to DO***

There are several types of investments and they all work differently.
 Diversification creates balance and reduces risk.
 Investment resources are options that allow for income growth.
 Both long and short term investing are useful strategies throughout life.
 Interest rates can have an impact on the rate of return on investments.
 Investing for retirement is essential and different when compared to other investing.
 Adequate funds must be saved in order to retire comfortably.

Core Learning Activities

- Student Activity Guide
- Compare: Types of retirement Accounts
- Analyze: What's the S&P 500?

Assessments

Investment Strategies Survey
Formative: Personal Project

Survey adults about investment strategies at different stages of life and create a creative presentation of those results.

Resources

Professional & Student

- Next Gen Personal Finance (www.ngpf.org)
 - Compare: Types of retirement Accounts
 - Analyze: What's the S&P 500?

Student Learning Expectation & 21st Century Skills

- Information Literacy
- Critical Thinking
- Spoken Communication
- Written Performance

Interdisciplinary Connections

Career Center
 Math Department





Unit Planner: Develop a Budget for Living Independently

Personal Financial Literacy

Tuesday, January 22, 2019, 2:08PM

Newtown High School > 2018-2019 > High School > F&AA: Business > Personal Financial Literacy > Week 16 - Week 20

Last Updated: Thursday, June 28, 2018
by Crooke Chelsea

Develop a Budget for Living Independently

Burgess, Brendan; Chelsea, Crooke; Holst-Grubbe, Erik; Swann, Jolene

- [Unit Planner](#)
- [Lesson Planner](#)

Concept-Based Unit Development Graphic Organizer (Download)

Unit Web Template (Optional)

Concepts / Conceptual Lens

Please attach your completed Unit Web Template here

Conceptual Lens: Resources

Unit Strands:

- Strand 1- Insurance and Risk Management
 - Types of insurance
 - Risk management
 - Paying for insurance
 - Using insurance
- Strand 2- Identifying Major Expenditures
 - Housing costs
 - Transportation costs
 - Utilities
 - Personal needs
 - Insurance
 - Debt
- Strand 3- Developing a Personalized Budget
 - 50-30-20 rule of thumb
 - Categories of a budget
 - Budget template
- Strand 4- Effectively Managing Discretionary Spending
 - Values
 - Needs and wants
 - Opportunity costs

Generalizations / Enduring Understandings

1. The types of insurance correlates to proper and effective risk management.
2. Paying for insurance equips the use of insurance.
3. Personal needs and wants determine the allocation of housing and transportation costs, utilities, personal needs, insurance, and debt.
4. The 50-30-20 rule is designed to categorize a balanced budget.
5. Opportunity costs are generated through personal values.

Guiding Questions

Please identify the type of question: (F) Factual, (C) Conceptual, (P) Provocative [Debatable]

1.
 - a. What are insurable risks? (F)
 - b. Why is insurance used? (C)
 - c. What type of insurance is most necessary? (P)
2.
 - a. What are the costs of insurance? (F)
 - b. How do companies pay for insurance claims? (C)
 - c. Do insurance companies charge too much? (P)
- 3.

- a. What are major expenditures? (F)
 - b. Why are major expenditures paid for separately? (C)
 - c. Which major expenditure has the widest range of costs? (P)
- 4.
- a. What is the 50-30-20 rule of thumb? (F)
 - b. Why are general rules of thumb used? (C)
 - c. Which category of a budget can be manipulated most easily? (P)
- 5.
- a. What are opportunity costs? (F)
 - b. How are values used to create budget? (C)
 - c. Should someone in the same age group have drastically different values? (P)

Standard(s)

Connecticut Core Standards / Content Standards

CT: CTE: Business and Finance Technology (2014)

Grades 9-12

Personal Finance

C. Managing Finances and Budgeting: Develop and evaluate a budget plan.

- 7. Construct and use a personal budget plan and evaluate it according to short- and long-term goals.
- 8. Categorize and classify expenses as fixed or variable.

H. Protecting Against Risk: Analyze choices available to consumers for protection against risk and financial loss.

- 26. Identify the type of insurance associated with different types of risk such as automobile, personal and professional liability, home and apartment, health, life, long-term care, and disability.

CT: CTE: Business and Finance Technology (2011)

Grades 9-12

Personal Finance

C. Managing Finances and Budgeting: Develop and evaluate a budget plan.

- 6. Construct and use a personal budget plan and evaluate it according to short- and long-term goals.
- 7. Define fixed and variable expenses.
- 8. Categorize and classify expenses as fixed or variable.
- 9. Determine discretionary income in a budget plan.

H. Protecting Against Risk: Analyze choices available to consumers for protection against risk and financial loss.

- 63. Evaluate insurance as a risk management strategy.
- 64. Identify the type of insurance associated with different types of risk (e.g., automobile, personal and professional liability, home and apartment, health, life, long term care, and disability).
- 65. Explain the role of insurance in financial planning.
- 66. Determine recommendations for insurance coverage for individuals/families at different income levels and varying risks.

Objective(s)

Bloom/ Anderson Taxonomy / DOK Language

- Students will identify the types of insurance to minimize risks through research.
- Students will understand how paying for insurance enables the use of insurance benefits through case studies.

Students will be able to categorize major expenditures by creating a budget.
 Students will manipulate budgets based on the 50-30-20 rule.
 Students will understand the relationship between values and opportunity costs.

Critical Content & Skills

*What students must **KNOW and be able to DO***

Identification and differentiation of types of insurance.
 Analysis of risk management and its correlation to the types of insurance.
 The parts of an insurance payment.
 Claims and the process to receive money from an insurance company.
 Identification of an individuals needs and wants.
 Defining what specific costs fall under housing and transportation costs, utilities, personal needs, insurance, and debt.
 The 50-20-30 rule of thumb categories.
 Establishing the factors that influence a balanced budget.
 Deriving the opportunity cost of a decision.
 Interpreting an individuals personal values and how they relate to spending and budget allocation.

Core Learning Activities

- Student Activity Packet
- Compare: Types of Car Insurance
- Insurance Needs Through Life Activity
- Compare: Needs vs Wants
- The Bean Game
- Play Insure Game

Assessments

A Salary Based Budget

Summative: Personal Project

Students research a salary for a possible career for the future, determine all expected costs associated with living on their own and develop a realistic budget based on their salary.

Resources

Professional & Student

- Next Gen Personal Finance (www.ngpf.org)
 - Compare: Types of Car Insurance
 - Compare: Needs vs Wants
 - The Bean Game
- Finance in the Classroom (<http://financeintheclassroom.org/>)
 - Insurance Needs Through Life Activity
- Playinsure.com

Student Learning Expectation & 21st Century Skills

Information Literacy

Critical Thinking

Spoken Communication

Written Performance

Interdisciplinary Connections





NEW PROGRAM/PILOT and RESEARCH PROJECT APPLICATION

Newtown Public Schools

ALL new programs/pilots and research projects MUST be approved by the Newtown BOE.

What will the program/pilot or research project be called?

Water Safety Instruction/Lifeguarding Certification

Give a brief description of the program/pilot or research project.

This course provides students with the knowledge, skills, and practice needed to become well trained and effective lifeguards at pools and non-surf beaches. In addition, the course addresses strategies for seeking employment opportunities. Students will learn and practice rescue approaches, assists, tows, and carries, as well as defenses and escapes. The class includes training in Cardiopulmonary Resuscitation (CPR), First Aid, and the use of an Automated External Defibrillator (AED) device. Emphasis on spinal injuries and emergency care in the water and other injuries that can occur in the pool will be taught. Students will be required to have proficient swimming skills. Time will be divided between the classroom setting and the pool.

Purpose

The purpose of the American Red Cross Lifeguarding course is to provide entry-level lifeguard participants with the knowledge and skills to prevent, recognize and respond to aquatic emergencies and to provide care for breathing and cardiac emergencies, injuries and sudden illnesses until Emergency Medical Services (EMS) personnel take over.

Lifeguard Training

The purpose of the Lifeguard Training class is to provide entry-level lifeguard participants with the knowledge and skills to prevent, recognize, and respond to aquatic emergencies and to provide care for breathing and cardiac emergencies, injuries and sudden illnesses until EMS personnel take over. Students who successfully complete all of the requirements and exams will become a certified lifeguard through the American Red Cross.

Prerequisites

- 1. Must be 15 years old on or before the final scheduled session of this course.*
- 2. Swim 300 yards continuously demonstrating breath control and rhythmic breathing. Candidates may swim using the front crawl (freestyle), breaststroke or a combination of both, but swimming on the back or side is not allowed. Swim goggles may be used.*
- 3. Tread water for 2 minutes using only the legs. Candidates should place their hands under the armpits.*

4. *Complete a timed event within 1 minute, 40 seconds:*

- *Starting in the water, swim 20 yards. The face may be in or out of the water. Swim goggles are not allowed.*
- *Surface dive, feet first or head first, to a depth of 7 to 10 feet to retrieve a 10-pound object.*
- *Return to the surface and swim 20 yards on the back to return to the starting point with both hands holding the object and keeping the face at or near the surface so you are able to get a breath. Candidates should not swim the distance under water. Exit the water without using a ladder or steps.*

Certification Requirements:

- *Attend and participate in all class sessions.*
- *Demonstrate competency in all required skills and activities.*
- *Demonstrate competency in all required final rescue skill scenarios.*
- *Pass both the Section 1-CPR/AED for the Professional Rescuer and First Aid and Section 2-Lifeguarding Skills final written exams with a minimum grade of 80 percent.*

PLANNING

Please answer the following questions:

1. What is the documented need for the program/pilot or research project?

This course aligns with the increased requirements for Connecticut Physical Education that will apply to students who will graduate in 2023 and beyond. This is an interdisciplinary course that aligns with Physical Education and Business curricula. Students will receive training and certification through American Red Cross while acquiring the knowledge to seek employment upon certification.

2. What research is available about the effectiveness of this program/pilot or research project?

Lifeguarding is a popular employment opportunity for young people. There are many local businesses, schools, and non-profit organizations that seek lifeguards on a yearly basis to fill job openings. This course will provide students with the necessary training and skills to obtain these jobs. This course also will enable students to learn important life-saving skills that can be used throughout their lives. In addition, the course coincides with the fitness component of cardiovascular endurance and muscular strength and endurance that aids in a healthy life beyond high school.

3. How does the program/pilot or research project align with the core beliefs of the Newtown Public Schools?

This proposal supports the quality goal of developing intellectually curious learners, which aligns with our Core Values and Beliefs. Students will work independently and collaboratively to receive certification in Lifeguarding, CPR/ First Aid and AED training. The course is based on American Red Cross curriculum. Students will have the opportunity to complete both the Spoken Communication and Problem Solving Graduation Standards in class, and they will be required to meet all Red Cross standards in qualify for certification.

Students will experience how critical thinking, problem-solving, and decision-making impact their skill development, and they will be able to connect that experience with skills and content that are taught reinforced through the classroom component.

Finally, this program taps into basic human needs by providing students with the tools and opportunities to be creative, competent, and independent in a real world setting. Not only will this curriculum connect real world practice with classroom learning, it will provide students with a framework to use their creative abilities seeking employment using job related skills.

4. Who have you communicated with about the program/pilot or research project and what are the responses? (ex: Building leadership team, department chair)

The plan for this proposed course was reviewed by the Business, Entrepreneurship, and Applied Technology (BEAT) Department Chairperson Mr. Erik Holst-Grubbe, the Physical Education and Health Department Chairperson Mr. Mark Gerace, Newtown High School (NHS) Principal Dr. Kimberly Longobucco, and the Newtown High School Leadership Team. The aforementioned staff expressed full support of this proposal.

5. Was the program/pilot or research project critiqued by a curriculum committee? What were their comments?

This is non-applicable, as Newtown Public Schools does not have a standing committee for Health and Physical Education; however, the Assistant Superintendent reviewed this course proposal and provided feedback. In addition, this course proposal is scheduled for review by the Curriculum and Instruction Subcommittee of the BOE during its regular meeting on 1/29/2019. The proposal is scheduled for a First Read by Board of Education on 3/5/2019 and a Second Read on 3/19/2019, at which time action will be taken.

6. Which staff and students will participate in the first year of the program/pilot or research project? How will they be selected?

An existing BEAT Department teacher and an existing Physical Education teacher will co-teach the course, and students will self-select to enroll. This course will be open to all tenth, eleventh, and twelfth grade students who are 15 years of age on or before the final scheduled session of this course. Students will earn a .5 elective credit (per semester) in the Health and Physical Education Department. Students will register for this course during the regular course selection process. There is a prerequisite for this course, which will be listed in the program description.

7. What are the staffing implications?

Based on current course offerings and existing section numbers, it is expected that this course poses no implications on staffing.

8. Do you anticipate that this will become a mandated program/pilot or research project?

This will not become a mandated program or course. It will remain an elective offering in the Health and Physical Education Department. However, this course will develop into a course offering that will satisfy the State of Connecticut's increased requirements for Grade 11 or 12 in Physical Education and Health credit obligation for students beginning in the year 2023.

9. When and how will the initial, start-up curriculum be written prior to initiation of the program/pilot or research project?

Curriculum for this course will be provided by the American Red Cross.

10. What is the plan for pre-implementation training and follow-up training?

Newtown High School teachers Brendan Burgess and Cheryl Lombardo have been pre-registered to receive required 20-hour training from the American Red Cross for preparatory training to qualify as facilitators of this course. Pending Board of Education approval of this course proposal, the teachers will attend this training in March 2019. Thereafter, every two years, the teachers must complete recertification training through the American Red Cross.

11. What are the projected costs for planning and future implementation? (i.e. curriculum development, instruction recourses, staff training)

- American Red Cross Initial Certification = \$800 (\$400 x 2 teachers)
- American Red Cross Recertification (Every 2 years) = \$100 (\$50 x 2 teachers)

- Equipment needs estimated:
 - Rescue tubes- \$900
 - American Red Cross instructor starter package (includes 4 AED's, 4 adult CPR mannequins, 4 infant CPR mannequins,) - \$1388.58
 - Backboards with straps and head restraint 2X \$200= \$400
 - Head restraint-1 @ \$64.00 (For existing backboard at NHS)
 - Backboard straps – 1 set @ \$20.00 (For existing backboard at NHS)
 - Diving bricks- 2X \$40=\$80.00
 - Practice barrier breathing masks for CPR- annual cost of \$50.00

MEASURING EFFECTIVENESS

12. How will you measure the program/pilot or research project effectiveness?

The overall effectiveness of the course will be measured by the following outcomes: 1) Percentage of Students Completing the Course, 2) Percentage of Students Certified by American Red Cross, 3) Student success rate in securing employment or community opportunities through the NHS Physical Education Department at NHS, the NHS Career Center, the Newtown Youth & Sports Association (NYA), and other local job placements in lifeguard positions.

13. Who will use the information to decide if the program/pilot or research project will be continued?

The continuance of the course will be determined annually through a review process that includes Assistant Superintendent Jean Evans Davila, NHS Principal Dr. Kimberly Longobucco, NHS Health and Physical Education Department Chairperson Mark Gerace, BEAT Department Chairperson Erik Holst-Grubbe, and the C & I Subcommittee of the Newtown BOE.

14. When and how will the results be communicated to the Board?

Updates will be provided to BOE through the NHS Principal on or about mid-year 2020, which will include discussion of enrollment statistics and schedule-design in relation to graduation requirements.

CONTACT: Mark Gerace, NHS Physical Education Chairperson

DATE: January 15, 2019

A succinct and revised version of this policy on this topic.

Students

Academic Dishonesty: Cheating/Plagiarism

As an academic community, the District will not tolerate academic dishonesty. Any activity of this nature is in opposition to the goals of the District as a place of learning and is contrary to the values of the schools of the District and the community. Dishonesty is not merely a private matter between the teacher and student but is a concern to the entire school community.

Cheating, defined as copying another student's work and claiming it as your own and plagiarism, defined as the use of another person's original ideas or writing without giving credit to the true author, are both prohibited practices. Materials taken from electronic sources are covered by this policy.

A student who engages in any form of academic dishonesty will be subject to the loss of credit for the work in question, as well as other disciplinary measures. "Due process" must be provided to students accused of cheating.

Each school level (Elementary, Middle, High) will develop guidelines that address violations and procedures. ~~Rules will be reviewed by the Board of Education and the Superintendent of Schools.~~ Guidelines will be published in all student/parent handbooks and on the District/school website.

(cf. 5114 - Suspension/Expulsion)
(cf. 5121 - Examination/Grading/Rating)
(cf. 5144 - Discipline/Punishment)

Legal Reference: Connecticut General Statutes

10-221 Board of education to prescribe rules, policies and procedures.

Policy adopted:

NEWTOWN PUBLIC SCHOOLS
Newtown, Connecticut

A revised sample policy to consider.

Students

Assigning Students To a Teacher and Classes in Grades K-12

Each Building Principal and/or appropriate staff will have the responsibility and the authority for assignment of each student to his or her class and, therefore, his or her teacher with the best interests of the child in mind. Principals will not take requests to place children with particular teachers. The parent(s) is/are encouraged to consult with their Principal or designee in the spring prior to classroom assignments concerning the child's learning style, specialties and difficulties, and particular needs, personal or educational. ~~The parent(s) is/are also encouraged to discuss with the Building Principal the child's progress in the fall once classes are under way. However, the Principal will make the final determination in placing all children.~~ Even when parent input is requested, final placement decisions are made by school staff.

Transfers

Students transferring from a school accredited by a State Department of Education will enroll at the grade level and with the course credits indicated by the records of the previous school. Students transferring from a school that is non-accredited will be accepted for enrollment at the level school records indicate, but the level of mastery and the quality of their previous class work must be validated against the District's performance standards and benchmarks.

Grades K-8

Previous work will be validated for K-8 students by successfully completing the grade in which they enroll. If upon enrollment, it appears that the student is not able to handle the assigned level after 20 school days, the school psychologist or other qualified person will evaluate the student by a written and/or oral examination. The psychologist, building principal, teachers, and parents involved will meet to determine the appropriateness of the placement of the student.

Grades 9-12

Transfer From an Accredited School

~~A student transferring from an accredited school must earn a minimum of _____ credits during the senior year to receive a _____ High School diploma. Students~~ A student transferring from an accredited school must complete all Newtown High School graduation requirements in order to participate in the commencement exercises. Any transferred second-semester senior may arrange with his/her former school to receive a diploma.

Transfer from a Non-accredited School (Including Home-Schooling)

Previous high school work will be validated for a 9-12 student by successfully completing a placement assessment for every unit/course completed in a non-accredited high school or home-schooling (i.e. successful completion of the placement assessment of mathematics) would validate the mathematics credit being transferred. If the placement assessment does not validate the credit, similar or equivalent work will be evaluated at the discretion of the Principal. ~~Students~~

Students

Transfer from a Non-accredited School (Including Home-Schooling) (continued)

~~transferring from non-accredited schools or home schooling may transfer a maximum of six (6) equivalent units per school year. Ordinarily, students from non-accredited high schools or from home schooling will not be eligible to graduate from _____ High School with less than two years of full-time attendance. (This could be modified to indicate the senior year as a minimum)~~

~~Assigning Students to a Teacher and Classes in Grades K-12~~ (continued)

(cf. 5122.3 – Assignment of Former Home-Schooled Students to Classes)

(cf. 5123 – Promotion/Retention)

(cf. 6146 – Graduation Requirements)

(cf. 6172.3 – Home Schooling)

Legal Reference: Connecticut General Statutes

10-221(b) Boards of education to prescribe rules

A sample policy to consider.

Students

Assignment of Former Home-Schooled Students to Classes

Placement of resident home-schooled students who seek to be readmitted to the District's schools will be determined by the Principal who shall consult with members of the professional staff to the extent appropriate. The Principal may direct that a test or tests be administered to help determine grade level. In addition, the Principal is authorized to collect from parents/guardians actual samples of coursework as he/she deems necessary in order to make the determination that the requisite academic standards have been met. The decision of the Principal may be appealed to the Superintendent. ~~In the event that the parent/guardian is still dissatisfied, the assignment may be appealed in writing to the Board of Education. (Alternate language: The Superintendent's decision will be final.)~~

A home-schooled student seeking admission to a District school must meet all residency, age, health examination, immunization and other eligibility prerequisites as mandated by State law and regulations.

Alternate language to consider:

~~Home-schooled students who wish to attend school in the District must be tested by an appropriate guidance counselor/teacher/department chairperson/etc., to determine grade level placement. The school officials shall make grade placement after consultation with the parents/guardians, guidance personnel, involved staff members and the Principal or designee. Criteria for final placement shall include past educational experience and successful performance and/or examination at the level of initial assignment. Grades earned during home schooling shall not be used in determining grade point average, National Honor Society Membership, or valedictorian/salutatorian honors.~~

~~A previously home-schooled high school level student may be awarded credits towards high school graduation by demonstrating mastery of the course outcomes by:~~

- ~~• Successfully passing an appropriate challenge examination;~~
- ~~• Providing portfolio/work sample evidence which demonstrates equivalent knowledge or skill;~~
- ~~• Providing documentation of prior learning activities or experiences (e.g., certification of training, hours of instruction, letters, etc.); and/or~~
- ~~• Passing a performance instrument or test administered by the respective Department Chairperson. The standards for designing and passing the performance instrument shall be set sufficiently high to ensure credits earned by such means shall be equivalent to those offered by the District in the framework of the Carnegie unit. Commercially available instruments may be used if they adequately cover course objectives. Credit for such classes shall be awarded only on a pass/fail basis.~~

Students

Assignment of Former Home-Schooled Students to Classes (continued)

Credit approval shall be granted when the student has demonstrated by clear and convincing evidence that he/she has achieved the same level of knowledge or skill as would have been accomplished by successful completion of the District's course(s) for which credit has been requested.

(cf. 5111 – Admission)

(cf. 5122 – Assigning Students to a Teacher and Classes in Grades K-12)

(cf. 5123 – Promotion/Retention)

(cf. 6146 – Graduation Requirements)

Legal Reference: Connecticut General Statutes

10-221(b) Boards of education to prescribe rules

Policy approved:

NEWTOWN PUBLIC SCHOOLS
Newtown, Connecticut

A sample administrative regulation to consider.

Students

Assignment of Former Home-Schooled Students to Classes

When a student enters the District from home-schooled instruction, the District is required to determine the appropriate grade level and course level placement for the student. In order to make such determination, when a student seeks entry, the following procedures/guidelines listed below shall be followed.

The District retains the absolute right for assignment of all students. The parent/guardian, teacher, student (when appropriate), and the Building Principal, (~~remove semi-colon and add comma after Principal~~) shall meet to consider appropriate placement at grade level.

Elementary and Middle School (K-8) Students

At the elementary and middle school levels, the grade placement shall depend upon the age of the student, physical maturity, social adjustment, performance in relation to student learning objectives for grade level and a review of the course work completed during home instruction, as submitted by the parent/guardian as proof of achievement. This may include a portfolio of completed assignments, essays, tests, reports or other materials. The use of placement tests, achievement tests, or other assessments as deemed necessary for evaluation and administered by school staff, shall also be appropriate in determining grade placement.

High School

In addition to the above criteria, the following applies to students seeking entry from home schooling at the high school level (9-12).

- The student must qualify for admission with appropriate grade level skills and course credits.
- The Principal or designee will verify that the student is eligible to be ~~included~~ enrolled in school. ~~under these procedures.~~
- Following consultation with parents/guardians and the administration of academic standardized tests and other assessments, where appropriate, the Principal or designee will make a determination of grade placement. Such determination will be based upon the District's official's professional judgment ~~of:~~ including, but not limited to, the following:
 - The requests of the parent/guardian;
 - The student's verified performance while on home-based instruction; and
 - When appropriate, the student's academic ability as documented by the results of district-administered standardized achievement tests and other assessments as appropriate.

Students

Assignment of Former Home-Schooled Students to Classes

High School (continued)

- Academic credits may be provided by the District to the student provided the student demonstrates appropriate academic proficiency. Proficiency in subject areas/courses is to be determined by tests administered by the respective Department Chairperson. Such tests can consist of semester and/or year-end tests. Any dispute or question to a proficiency determination shall be referred to the Principal.
- The amount of credit(s) to be awarded will be determined by the Department Chairperson(s) on the basis of proficiency with a recommendation to the Principal. Satisfactory proficiency for a specific course will be given a grade of “P” for passing with no letter or numerical designation of level of proficiency.
- When a determination has been made that the student is to receive credit toward graduation for a course(s) taken while home-schooled, the letter “P” as indicated above shall be entered on the student’s transcript, for pass, along with the statement, “Home-Schooled.” These courses are not to be considered in the grade point average or class rank of the student.
- When non-academic courses, such as art or music, are presented for credit by a home-schooled student, the school personnel responsible for determining mastery may elect to review a portfolio of work done by the student and/or allow the student to demonstrate proficiency through a performance.
- Once the appropriate grade level has been determined, the student and his/her parent/guardian and a guidance counselor will develop a planned program of study which will enable the student to make appropriate progress toward fulfilling the District’s graduation requirements.
- All students must complete all courses required by ~~s~~ State and federal statutes.
- In order to graduate from ~~the District’s high school~~ Newtown High School the student must be fully enrolled in ~~the District his/her~~ for their twelfth (12th) grade. (*alternate: eleventh and twelfth grade*)
- No student shall be eligible for valedictorian/salutatorian honors or for designation as an honors graduate who has not been enrolled in the district’s high school for at least two years preceding high school graduation.

Students

Assignment of Former Home-Schooled Students to Classes (continued)

(cf. 5111 – Admission)

(cf. 5122 – Assigning Students to a Teacher and Classes in Grades K-12)

(cf. 5123 – Promotion/Retention)

(cf. 6146 – Graduation Requirements)

(cf. 6172.6 – Distance Education – Virtual/Online Courses)

Legal Reference: Connecticut General Statutes

10-221(b) Boards of education to prescribe rules

Regulation approved:

NEWTOWN PUBLIC SCHOOLS
Newtown, Connecticut

Students

Promotion/Acceleration/Retention

Promotion

The Newtown Board of Education is dedicated to the continuous development of every student. Therefore, the District will establish and maintain the highest standards for each grade and systematically and continuously monitor each student's performance throughout her/his enrollment in the Newtown Public Schools. The Board believes that high academic standards across all grade levels provide the foundation for improved student achievement.

The District shall determine when promotion and graduation requirements are met.

- Academic achievement - the successful completion of the curriculum as evidenced by demonstrated proficiency and/or assessed proficiency in the district's academic content areas and the mastery of expected skills, particularly in the core subjects (language arts, mathematics, science, and social studies);
- Academic potential and aptitude;
- Attendance;
- Performance on statewide assessments, standardized norm-reference testing, performance assessments, and other appropriate evaluation instruments.

All students are expected to progress through one grade each academic year. Students shall be placed in the grade level to which best meets their needs academically, socially, and emotionally and the education program will provide for continuous progress from grade to grade. To accomplish this, instruction must be designed to meet the varied interests, growth patterns, and learning styles of each student. Strategies to address the needs of those students demonstrating academic deficiencies must be in place. To foster student success, the District is committed to the following initiatives:

- Adopt rigorous curricula and high standards of performance;
- Align curricula with the Connecticut Common Core and State Frameworks, the Common Core of Learning, and the statewide assessments;
- ~~Publish Essential Skills in the core subject areas~~ Develop concept-based curricula in core academic and electives areas routinely;
- Provide academic and/or social/emotional interventions when appropriate. ~~at an early level to prevent future failure;~~
- Maintain a safe and orderly environment conducive to student learning;
- Monitor individual student progress through scientific research based intervention (SRBI) teams; ~~the Student Assistance Team and/or Consult meetings;~~ and
- Employ a variety of instructional strategies to foster independence, growth and success. ~~Utilize instructional practices designed to foster success.~~

Students

Promotion/Acceleration/Retention (continued)

Acceleration

Students who are advanced in their academic performance and maturity may have their needs met by acceleration to the next higher sequence of study. When it appears that the student has demonstrated unusual ability and interest in particular areas of study, every effort should be made to accelerate that student. In general, acceleration implies moving up from one grade level to the next or an accommodation within the program of studies, particularly at the middle or secondary school level, enabling a student to take advanced work in a given subject matter area.

Recommendation for acceleration may be initiated by the school and should be made by letter to the parent, guardian, or student over 18 years of age only after very careful study of the needs of the student by members of the professional staff. At the pre-high school level, recommendation for acceleration to the next grade level may be initiated by the school or the parent only after very careful consideration of the student's learning potential, chronological age, and social-emotional development.

While final authority for acceleration of the student is a professional decision that must rest with the school, a parent-teacher conference with the building administrators, as well as parental approval, should precede such determination to accelerate.

A parent, guardian, or student over 18 years of age may initiate a request for student acceleration. Such request shall include the same review and appeal procedures identified elsewhere in this policy statement.

When a decision is made to accelerate a student whether whole grade or single subject acceleration, administration from all subsequent levels need to be involved in the plan.

While final authority for acceleration of the student is a professional decision that must rest with the school, a parent-teacher conference with the building administrators, as well as parental approval, should precede such determination to accelerate.

Retention

The Board's belief is to minimize the practice of promoting students to the next grade level for social reasons even though they have not met required academic standards. Therefore, students who have mastered the appropriate skills will be promoted; those students who have not will be considered for retention according to the following guidelines:

- Retention has a reasonable chance of improving the child's academic skills;
- No student will be retained more than once in a given grade;

- No student will be retained at the middle school if he/she will reach the age of 16 by January 1st of the school year; and
- Parents/guardians will be advised when retention is being considered as soon as possible but no later than ~~March 1~~ April 1 of any given school year.

The administration and faculty will establish a clear and continuous system of grading and reporting academic progress to keep the students and their parents (or guardians) informed throughout the year. This system shall determine when promotion/graduation requirements are met. A student will not be promoted for social reasons not related to academic performance, except when in conflict with State and federal regulations.

(cf. 5124 - Reporting to Parents)

(cf. 6146 - Graduation Requirements)

(cf. 6146.1 - Grading System)

Legal Reference: Connecticut General Statutes

P.A. 99-288 An Act Concerning Education Accountability

10-221(b) Boards of education to prescribe rules.

10-265g Summer reading programs required for priority school districts. Evaluation of student reading level. Personal reading plans. (as amended by PA 01-173)

10-265l Requirements for additional instruction for poor performing students in priority school districts; exemption. Summer school required; exemption (as amended by PA 99-288, PA 01-173, and PA 03-174)

Policy adopted:

NEWTOWN PUBLIC SCHOOLS
Newtown, Connecticut

Students

Promotion/Acceleration/Retention

School personnel will identify students (K-12) at risk ~~and/~~ or failing and, therefore, in danger of retention. Once identified the district shall provide and require students to attend one or more district programs designed for remedial assistance. These programs may include, but are not limited to, the following:

- extended day tutorial programs;
- summer school;
- small group instruction during the school day;
- cross-age tutoring or student mentoring;
- ~~Summer Academy;~~
- ~~Saturday;~~
- Alternative programming, ~~other than academic.~~

Neither retention nor social promotion is considered an adequate response to student failure. The Newtown Public School District is committed to continually addressing the underlying reasons for student failure to achieve and make changes in school organization, curriculum, instruction, student support services, and educational practices to ensure student progress.

Chronological Age

~~A student who reaches the age listed below on the first day of the school year is to be placed in the next grade when appropriate.~~

- ~~Age 14 to grade 7~~
- ~~Age 15 to grade 8~~
- ~~Age 16 to grade 9~~

Grades Elementary/Intermediate School

The *elementary/intermediate school* shall continue to make individual decisions based on the following:

- Interventions
- Daily performance
- Emotional development
- Social development
- Chronological age
- Assessment
- Teacher input
- Basic skills
- Exceptionality
- Cognitive ability

Students

Promotion/Acceleration/Retention

Grades Elementary/Intermediate School (continued)

Retention Procedures

When retention is suggested, recommended, or requested:

1. A parent/teacher conference will be held to identify concern(s). The teacher will provide information on retention research to the parents within 10 days of the request. The teacher will create a record of the conference identifying concerns and strategies/interventions attempted. A copy of this record will be submitted to the Principal.
2. The Principal will conference with the teacher and/or parent(s) to develop an educational plan to be implemented immediately, refer the case directly to the child study team, or assign a case manager. The case manager and/or child study team will then work with the teacher and parents to identify and implement alternative strategies and monitor student progress.
3. If retention continues to be a consideration and is in the best interest of the student, the Principal will make the final decision.
4. By the end of the current school year, the child study team will develop a plan to address the educational concerns about this student, which will be implemented and monitored during the following school year.

Middle School

Standards for Promotion/Summer School

~~The *middle school* student who fails two or more core subjects (language arts, mathematics, science, social studies or world language) shall be retained at his/her present grade level or be required to attend a prescribed program of study.~~

In order to advance to the next grade, grade 7 and 8 students must pass three of the four core subjects (language arts, math, science, and social studies). If a student passes only two of the core subjects, he/she will need to pass one course in summer school in order to be promoted. If the student passes only one course, or passes two courses but does not attend summer school, he/she will be retained. Students may take only one course in summer school.

Retention Procedures

When retention is suggested, recommended, or requested:

1. Parent/cluster meetings will be conducted addressing academic deficiencies.

R5123(c)

Students

Promotion/Acceleration/Retention

Middle School (continued)

Retention Procedures (continued)

2. Communication from the appropriate guidance counselor and/or staff member reporting academic deficiencies and support options will be sent to both parents and students.
3. A conference with a parent(s), student, and Principal (or designee) will be conducted prior to the end of the third quarter on the possibility of retention and consideration of support options.
4. A final letter stating retention and outlining alternative options that would lead to promotion will be sent by the building Principal at least ten days prior to the last day of school.

High School

High school graduation shall be based on the student's ability to pass classes necessary to earn the required number of credits in specified curricular subjects. *High school* students shall be promoted not by years but by ~~unit~~ credits earned in accordance with established Board of Education policy.

Requirements for Graduation

Satisfactory completion of a year-long course earns one credit; a semester course earns one-half credit.

Ninth, tenth and eleventh grade students must carry a minimum of six courses each semester. Twelfth grade students must carry a minimum of five courses each semester. Promotion from grade to grade is determined on credits earned and is as follows:

<u>For promotion to Grade 10</u>	<u>5 credits</u>
<u>For promotion to Grade 11</u>	<u>10 credits</u>
<u>For promotion to Grade 12</u>	<u>16 credits</u>
<u>For graduation</u>	<u>23 credits (24 credits beginning with the class of 2021)</u>

Students must earn a minimum of 23 credits (24 credits beginning with the class of 2021) and satisfy the senior health requirement. Credit requirements must be distributed as follows:

Students**Promotion/Acceleration/Retention (continued)****High School (continued)****Requirements for Graduation (continued)**

<u>Subject</u>	<u>Credit</u>	<u>Specific Requirements</u>
<u>English</u>	<u>4</u>	<u>1 credit – English I</u> <u>1 credit – English II</u> <u>1 credit – English III (American Literature)</u> <u>1 credit – Senior English Courses</u>
<u>Mathematics</u>	<u>3</u>	<u>Successful completion of any math course fulfills the requirement, but completion of Algebra 1, Algebra 2 and Geometry is recommended.</u>
<u>Science</u>	<u>3</u>	<u>Successful completion of any science course fulfills the requirement but at minimum the following is recommended: 1 physical (earth science or physics), 1 life (biology), 1 elective (any science class).</u>
<u>World Language</u>	<u>1</u>	<u>All students must earn 1 credit of World Language; however, many colleges prefer a minimum of 2–3 years of the same language.</u>
<u>Fine Arts & B.E.A.T.</u>	<u>1.5</u>	<u>1 credit can be fulfilled by courses in any of the following areas: Art, Business Education, Computer Science, Family & Consumer Science, Music, Technology Education, or Theatre. Students must complete a course in Personal Financial Literacy, resulting in 1½ credits in Fine Arts/B.E.A.T.</u>
<u>PE & Health</u>	<u>1.5</u>	<u>PE 9 and Health 9, PE 10, PE 11 or Weight Training and Health 11.</u>
<u>Senior Capstone Experience</u>	<u>(1*)</u>	<u>*Beginning with the class of 2021, all students must earn 1 credit in Senior Capstone Experience</u>
<u>Electives</u>	<u>6</u>	<u>Any course which is not required.</u>
<u>Total Required</u>	<u>23(24*)</u>	<u>Students must earn 23 credits to graduate.</u> <u>*Beginning with the class of 2021, students must earn 24 credits to graduate.</u>

Students

Promotion/Acceleration/Retention (continued)

Criteria for Promotion/Retention

CRITERIA	Factor for Promotion	Factor for Retention	Not a Significant Factor
<p>1. <u>Estimated Developmental Age</u> The developmental age of a child is the age at which a child is behaving as a total person (physically, socially, emotionally and intellectually)-a functioning age. Consideration of the developmental age is probably most applicable to the first four years of formal school attendance, or for chronological ages of 4 through 8.</p> <p>2. <u>Academic Achievement</u> Consideration is given to how the student is achieving in basic skill areas, particularly reading and mathematics, based on daily classroom work, information on the report card, and standardized testing results.</p> <p>3. <u>Apparent Learning Potential</u> As evidenced by group and/or individual test results, what is the apparent ability level of the student? Research suggests that the student who is within the average, slightly above, or below ability range is usually one who can most benefit from retention.</p> <p>4. <u>Present Grade Placement</u> According to research, when retention has been found to be beneficial, it is almost always in the primary grades.</p> <p>5. <u>Previous Retentions</u> Consideration should be given to whether the child has been retained previously and/or has been held out of kindergarten for a year.</p> <p>6. <u>Motivation/Work Habits</u> Consideration should be given to whether the student shows some interest in and makes an effort to complete his/her school work independently.</p> <p>7. <u>Learning Styles</u> Accommodations should be made to address the child's individual learning style: visual auditory, kinesthetic. Have modifications in presentation been effective?</p> <p>8. <u>Social Behavior</u> Factors such as the following should be considered: how well the child relates with peers; association with younger children; ability to follow school rules; and significant anti-social behavior, if any.</p>			

Students

Promotion/Acceleration/Retention (continued)

Criteria for Promotion/Retention (continued)

CRITERIA	Factor for Promotion	Factor for Retention	Not a Significant Factor
<p>9. <u>School Attendance</u> A poor attendance record may result in significant gaps in the child's basic skills.</p>			
<p>10. <u>Transiency</u> Consideration should be given to whether the highly transient child will benefit from retention, primarily because this pattern may be likely to continue.</p>			
<p>11. <u>Emotional Behavior</u> Emotional characteristics of the child should be considered: are there consistent signs of distractibility, depression, over-activity, withdrawal, nervousness, etc., or is the child generally free from signs of skewed emotional development.</p>			
<p>12. <u>Attitudes of Parent/Child</u> The projected or stated attitude of parent/child toward retention should be considered.</p>			
<p>13. <u>Family Life Atmosphere</u> Has there been a recent divorce, significant death, or other traumatic occurrences which may be influencing the student?</p>			
<p>14. <u>Sibling/Placement in Family</u> Consideration should be given to whether the child, if retained, would be placed in the same grade as a younger sibling.</p>			
<p>15. <u>Physical Development/Health History</u> Factors such as the following should be considered: gross and fine motor skills, physical size, history of illnesses, hospitalizations, hearing or vision problems, etc.</p>			

Students

Promotion/Acceleration/Retention (continued)

Criteria for Promotion/Retention (continued)

CRITERIA	Factor for Promotion	Factor for Retention	Not a Significant Factor
<p>16. Special Services Has the child study team been convened? What special services have been provided to the child? <u>What has been the result of special services implemented</u> and what is expected in the future? (List services)</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>			
<p>17. Other Factors (list)</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>			

Regulation approved:

NEWTOWN PUBLIC SCHOOLS
 Newtown, Connecticut

An optional policy to consider.

Students

Graduation Ceremonies (Participation)

The Board believes that completion of the requirements for a diploma from the District is an achievement that improves the community as well as the individual. Therefore, the Board wishes to recognize that achievement annually in a publicly held graduation ceremony.

Only students who have successfully completed all requirements and obligations prescribed by Board policy and the school administration will be eligible to participate in the graduation ceremony, except as provided below:

1. A foreign exchange student may be permitted to participate in the graduation ceremonies at the discretion of the school administration, upon successful completion of the school year.
2. A student who is within one semester credit of meeting graduation requirements at the end of the school year will be permitted to participate in the graduation ceremonies with his/her class if he/she has made arrangements to complete the credit. His/her diploma will be awarded when the requirement has been met.
3. Additional exceptions may be approved by the Board in unusual circumstances, upon recommendation of the school administration.

The school administration shall notify all students of the requirements and obligations that must be met in order to participate in the graduation exercises. Individual students who are not or may not be eligible to participate in the graduation ceremonies, and their parent(s)/guardian(s), shall be notified by certified mail no later than two (2) weeks after completion of the first semester of their senior year.

Another version:

~~Graduation and related senior activities shall be established as opportunities to honor and to recognize those who have successfully completed the District's course of study and are qualified to receive a diploma. The Board believes that these students deserve a public celebration that recognizes the pursuit of learning throughout their lives.~~

~~High school students must fulfill state and District graduation requirements in order to participate in graduation ceremonies.~~

~~In order to encourage high standards of student conduct and behavior, the principal may deny the privilege of participating in graduation ceremonies and/or activities in accordance with school rules. School rules shall ensure that the student and parent/guardian receive written notice of the privilege(s) to be denied, the grounds for such denial and the means whereby a student may appeal this decision.~~

Students

Graduation Ceremonies (Participation) (continued)

Another version: (continued)

~~To honor superior academic achievement, graduation ceremonies may include recognition of a valedictorian and salutatorian. The Superintendent or designee shall establish procedures that ensure a fair determination of the students who have achieved the highest grade point average in the graduation class.~~

~~The Superintendent or designee may identify other school sponsored awards which may be given during graduation exercises. A separate awards program may be held to recognize graduation students receiving other school and non-school awards.~~

Limitations:

1. These activities shall be free from innovative acts and interruptions which diminish the dignity of the activities for the other participants and their family.
2. Participation shall be a privilege, reserved to those who conduct themselves according to the established guidelines, rather than a right.
3. Participation privileges shall be withdrawn from any student whose conduct is not according to established guidelines.
4. Cooperation must be exhibited with school staff members and administration in senior activities, including the graduation ceremony.
5. In order to preserve the dignity of the graduation ceremony, students must conform to school-sanctioned standards and expectations for behavior and attire.
6. Prior to the graduation ceremony and receiving a diploma, school properties must be returned and all outstanding fees paid.

(cf. 5114 – Suspension/Expulsion; Student Due Process)

(cf. 5123 – Promotion/Retention)

(cf. 5131 – Conduct)

(cf. 5144 – Discipline/Punishment)

(cf. 6146 – Graduation Requirements)

Legal Reference: Connecticut General Statutes
10-221 Boards of education to prescribe rules, policies and procedures

Policy adopted:
cps 3/04

NEWTOWN PUBLIC SCHOOLS
Newtown, Connecticut