

CEA BOARD OF DIRECTORS

FRIDAY, MARCH 8, 2024
Café Fiore, Cromwell, CT

5:00 P.M.

A. CALL TO ORDER - President KATE DIAS

Seating of Vice Chairpersons

B. ACTION: Meeting Minutes

Acceptance: Board of Directors' Meeting of February 2, 2024

Informational: Executive Committee Meeting of February 21, 2024

C. CEA AUDIT PRESENTATION

D. ACTION ITEMS:

1. Audit Approval
2. UniServ Funding
3. NEA RA Reimbursement
4. Teacher of the Year Support
5. HCR Awards

E. REVIEW RA DOCUMENTS

1. Agenda
2. Budget Review
3. Committee/Commission RA Reports
4. Constitution Revision Presentation
5. CEA Resolutions Proposals
6. CEA Standing Rules Proposals

G. TODD JAECK WELCOME

H. KATE DIAS INFORMATION

1. County Forum Update
2. CEA RA & NEA RA - New Business Items
3. Certification Council

I. JOSLYN DELANCEY INFORMATION

1. Read Across CT update
2. CEF Golf Tournament
3. RA Silent Auction
4. Statewide Negotiations Committee

J. REPORTS

K. COMMITTEE/COMMISSION MINUTES

L. NEW BUSINESS

M. EXECUTIVE SESSION

N. GENERAL INFORMATION

1. Financials
2. Contact: Whittlesey

O. ADJOURNMENT

Please note that New Business Items should be submitted by 8:00 p.m.

NOTE: Board Policy states that evening meetings of the Board of Directors will be adjourned by 11:30 p.m. unless most of those present votes to extend the meeting. Through courtesy and attention by everyone, adjournment will be as early as possible.



**CEA Board Meeting
March 8, 2024**

B. ACTION: Meeting Minutes



**"UNOFFICIAL"
CEA BOARD MEETING
MINUTES**

**FRIDAY, FEBRUARY 2, 2024
ZOOM MEETING**

5:00 P.M.

A. CALL TO ORDER

President Kate Dias called the meeting to order 5:06 p.m.

Seating of Vice Chairpersons: Stacey Guertin for Scott Mahon, Kevin Egan for Cherie Calabrese, Gail Jordan for Lisa Cordova, Sandra Mangan for Evelisa Mayette (only until 5:15).

B. ACTION: Meeting Minutes

Acceptance:

MOTION: T. Flaherty/Perone

Move to accept the meeting minutes from the Board of Directors' Meeting of January 12, 2024.

CARRIED

C. BUDGET UPDATE

- Finance committee update
 - CEA-RA 2024 ~ \$0.76 dues increase.
 - RA Transportation: Up to \$300 for transportation for State Delegates and 50% of the actual cost up to \$150 for local delegates.
- Local Grant Discussion - There was a 20-minute breakout group session where there were discussions on the pro's and con's of separating the grant, the purpose, and the introduction.

D. BILL RAABE INFORMATION

- a. Two regional offices are closed; the associate staff have been reassigned to 21 Oak Street successfully. 6 Uniserv staff work from home and will use 21 Oak Street as needed. In June, the Waterbury office will be closed. The Trumbull office will be extended two years in April with decreased leasing amounts. The Norwich office will expire in December, and it is anticipated to be extended for two years. Uniserv hoteling space at 21 Oak Street did not cost anything additional.
- b. The refresh of the 5th floor of 21 Oak Street is looking good and should be completed in the next few weeks. The 3rd floor demolition is completed. The wiring is beginning next week. The 5th floor will be rewired at the same time. The build out of the 3rd floor will occur after the wiring. All tenants are anticipated to renew their leases.
- c. On March 5, CEA's new Executive Director will be onboarding.

E. KATE DIAS INFORMATION

1. Legislative Initiatives

- The legislative agenda was shared with Local President's today.
- Initial Educator fees were waived by the Governor. CEA's response was to thank the Governor and say we were encouraged to continue to work together on more initiatives.

- COVID reminders and elections on the TRB are initially very important conversations to have with legislators. There is massive confusion on the TRB elections issue. CEA needs to educate legislators about why active teachers need to be able to vote in all elections for TRB, not just active teachers. Proportionally this is a challenge as there are less retired than active teachers voting and equal representation on the TRB. CEA Retired agrees with CEA's position. We have t-shirts for repealing GPO/WEP.
 - Legislative Breakfast - February 24, 2024.
 - Lobby Day - April 3, 2024.
2. RA Information
 - a. Parliamentary conversation occurred regarding Ex-Officio and Vice Chairs differences. All members can participate and make motions but cannot vote if Ex-Officio members. Seated Vice Chairs can vote.
 - b. Delegate information for locals is coming shortly. Seated Board of Directors attend as delegates to the RA and are funded by the CEA. Vice Chairs would need to be elected in their local and would not be funded by CEA. The CEA RA is on May 17-18 at Mohegan Sun. We are most likely booking with Mohegan Sun on May 9-10, 2025.
 - c. There is a Certification Council meeting on Monday that Kate will attend.
 3. The Dalio Foundation is hosting a roundtable conversation about disengaged youth with CEA facilitating.

F. JOSLYN DELANCEY INFORMATION

1. Read Across Connecticut
 - a. Over 20 people requested libraries or book donations.
 - b. The location for Read Across Connecticut is in Bloomfield with a focus on Middle School students.
 - c. There is a new logo!
2. Statewide Negotiations team
The first meeting was very successful.
3. GPO/WEP awareness this week. Repeal the Steal week. This is in conjunction with the national repeal GPO/WEP group. HR-82 is being pushed to a mark-up session. There are over 300 co-sponsors in the House but less support in the Senate with the sister bill. #WEP/GPOmustgo
4. Early Bird special for Morning sessions for the CEF Golf tournament are coming this summer.

G. REPORTS

Reports from committees were provided.

H GENERAL INFORMATION

1. County Forum & President's meetings information provided.
2. CEA PAC Fundraiser
3. Repeal the Steal
4. Early Career Conference
5. Election Memos
6. NEA lobbying: GPO/WEP, Educational Support Professional Bill of Rights, Child Tax Credit, Secure Rural Schools
7. KC Petruzzi attended the Social Media round table with Senator Blumenthal. Any information that can be passed along, please email KC Petruzzi: truzzikat@gmail.com

February 2, 2024, Board of Directors minutes continued.

K. COMMITTEE COMMISSION MINUTES

Minutes from committees were provided.

L. ADJOURNMENT

MOTION: Downhour/Kores

Move to adjourn.

CARRIED

MEETING ADJORNED AT 6:36 P.M.

Respectfully submitted by:

Tara Flaherty, CEA Secretary

Mary-Pat Soucy, Executive Assistant

CEA EXECUTIVE COMMITTEE

MINUTES

February 21, 2024
Mondani Board Room

5:40 P.M.

Present: Tara Flaherty, Kate Dias, Joselyn DeLancey, Bill Rabbe, Stephanie Wanzer, Lovel Cassells, Peter Downhour, Mary Pat Soucy, Lisa Cordova, Lillian Perone

Call to Order – 5:40

1. Review January Executive minutes.
MOTION: T. Flaherty/Wanzer
Move to accept the January 24, 2024 Executive Committee Minutes as amended.
CARRIED

2. ACTION:
 - NEA UniServ funding
Discussion occurred.
MOTION: Wanzer/DeLancey
Move to authorize the CEA President and Executive Director to approve the 2024-2025 Uniserv Grant application.
CARRIED

 - CEA Audit
Discussion occurred.
MOTION: DeLancey/Wanzer
Move to forward the Audit documents to the Board of Directors with a recommendation to accept the CEA Audit Report.
CARRIED

 - NEA RA Reimbursement to locals
MOTION: Wanzer/Delancey
Move to accept the Finance Committee recommendation for travel reimbursement to local NEA RA delegates be 50% of their NEA RA transportation expenses up to \$150.
CARRIED

 - Teacher of the Year Sponsorship
MOTION: Wanzer/Delancey
Move to support the Teacher of the Year by becoming a sponsor for this program in the amount of \$1,000. Money to come from Contingency.
CARRIED

3. RA Agenda
Discussion: A conversation regarding limiting the number of awards at the RA and sending them to the Gala.

4. Review CEA Budget
Discussion occurred. Distribution of funds paperwork was requested with personnel expenses redacted.

5. Review Committee/Commission RA Reports provided.

6. Review Constitution Revision Presentation
MOTION: DeLancey/Cordova
Move to send the Constitution Amendment #1 and #2 back to C&BL to change the word “assets” to “buildings and or properties”.

CARRIED

7. Review Resolution Proposals reviewed
8. Review Standing Rule Proposals
MOTION: DeLancey/Cordova
Move to send the following sentence to RA Planning for review in Delegate Resources. **CEA shall digitally post all proposed amendments for delegates to review no later than two weeks prior to the CEA RA.**

CARRIED

9. Kate Update
Legislatively, CEA is pushing hard. 118 members are signed up for the Legislative Breakfast. Cornhole on March 9th only has a few members registered.
10. Bill Update
 - a. Event planner/member benefits Molly Ferguson has resigned. There will be an internal and external posting at the same time with an agreement from the union.
 - b. HR Director Jennifer Green has resigned as of March 1. We have some assistance from NEA (at no cost to CEA).
 - c. Uniserv Kim Davis is retiring in July.
 - d. ADP challenges with W-2 and/or payroll and 401K have occurred.
 - e. There is an IT/meeting and planning assistance opening.
 - f. The front lobby secretary will not be replaced.
11. Joslyn DeLancey Update
Read Across is next week in Bloomfield. Some NFL players are coming!! March 2 book drive. TEVAL is busy work. Please consider planning baskets for the CEA RA for the REDAC and Gloria Brown scholarships.
12. Adoption of Board Agenda with flexibility
MOTION DeLancey/T.Flaherty
Move to adopt the Board Agenda with flexibility.

CARRIED

13. Other – Unit Delegates vacancies
RA planning has asked for the NEA RA unit vacancies to be appointed. Towns will be added to the Board packet.
14. Adjournment 9:15.



Connecticut
Education Association

**CEA Board Meeting
March 8, 2024**

C. CEA AUDIT PRESENTATION

CONNECTICUT EDUCATION ASSOCIATION, INC.

Financial Statements

June 30, 2023 and 2022

(With Independent Auditors' Report Thereon)

Draft

CONNECTICUT EDUCATION ASSOCIATION, INC.

Table of Contents

Independent Auditors' Report 1

Statements of Financial Position 2

Statements of Activities 3

Statements of Functional Expenses 4

Statements of Cash Flows 5

Notes to Financial Statements 6 - 13

Draft

INDEPENDENT AUDITORS' REPORT

To the Board of Directors
of Connecticut Education Association, Inc.

Opinion

We have audited the accompanying financial statements of Connecticut Education Association, Inc. (a nonprofit organization; the "Association"), which comprise the statements of financial position as of June 30, 2023 and 2022, and the related statements of activities, functional expenses, and cash flows for the years then ended, and the related notes to the financial statements.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of Connecticut Education Association, Inc. as of June 30, 2023 and 2022, and the changes in its net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinion

We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Our responsibilities under those standards are further described in the Auditors' Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of the Association and to meet our other ethical responsibilities in accordance with the relevant ethical requirements relating to our audits. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Responsibilities of Management for the Financial Statements

Management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the Foundation's ability to continue as a going concern within one year after the date that the financial statements are available to be issued.

Auditors' Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditors' report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with generally accepted auditing standards will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with generally accepted auditing standards, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Association's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about the Association's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control related matters that we identified during the audit.

Hartford, Connecticut
February 2, 2024

CONNECTICUT EDUCATION ASSOCIATION, INC.

Statements of Financial Position

June 30, 2023 and 2022

	2023	2022
ASSETS		
Current assets:		
Cash and cash equivalents	\$ 8,576,488	\$ 8,254,860
Marketable securities	19,919,846	19,413,724
Dues receivable	788,115	1,242,286
Other assets	149,788	160,868
Total current assets	29,434,237	29,071,738
Land, buildings and equipment, net	6,988,706	7,678,684
Total assets	\$ 36,422,943	\$ 36,750,422
LIABILITIES AND NET ASSETS		
Liabilities:		
Current liabilities:		
Accounts payable and other accrued expenses	\$ 1,705,029	\$ 864,175
Dues payable to National Education Association	1,904,744	1,894,194
Accrued postretirement benefits other than pension, current	992,174	845,100
Accrued postretirement pension benefits, current	2,263,000	2,227,000
Total current liabilities	6,864,947	5,830,469
Long-term liabilities:		
Accrued compensated absences and severance	1,801,679	2,180,037
Accrued postretirement benefits other than pension, net	363,897	2,944,162
Accrued postretirement pension benefits, net	4,074,093	8,536,214
Total long-term liabilities	6,239,669	13,660,413
Total liabilities	13,104,616	19,490,882
Net assets/(deficit) without donor restrictions:		
Operating funds - net current assets	22,569,290	23,241,269
Land, buildings and equipment, net	6,988,706	7,678,684
Retirement benefits	(6,239,669)	(13,660,413)
Total net assets without donor restrictions	23,318,327	17,259,540
Total liabilities and net assets	\$ 36,422,943	\$ 36,750,422

The accompanying notes are an integral part of the financial statements.

CONNECTICUT EDUCATION ASSOCIATION, INC.

Statements of Activities

For the years ended June 30, 2023 and 2022

	2023	2022
Changes in net assets without donor restrictions:		
Operating revenues:		
Dues	\$ 18,757,473	\$ 18,706,374
Building rental and garage income	1,784,013	1,749,649
NEA support and reimbursements	1,632,604	1,381,448
Special services and other	637,052	827,088
Total operating revenues	22,811,142	22,664,559
Operating expenses:		
Program	16,702,778	16,161,231
Management and general	6,002,886	5,728,473
Total operating expenses	22,705,664	21,889,704
Change in net assets from operations	105,478	774,855
Other changes in net assets:		
Investment income/(loss), net	506,122	(2,781,903)
Pension changes other than net periodic pension cost	3,219,440	7,408,858
Postretirement benefit changes other than net periodic cost	2,227,747	1,161,266
Total other changes	5,953,309	5,788,221
Change in net assets	6,058,787	6,563,076
Net assets/(deficit), beginning of year	17,259,540	10,696,464
Net assets, end of year	\$ 23,318,327	\$ 17,259,540

The accompanying notes are an integral part of the financial statements.

CONNECTICUT EDUCATION ASSOCIATION, INC.

Statements of Functional Expenses

For the years ended June 30, 2023 and 2022

	2023		
	Program	Management and General	Total
Personnel	\$ 13,125,907	\$ 2,619,026	\$ 15,744,933
Net periodic pension and postretirement cost	333,196	66,483	399,679
Travel	737,609	27,664	765,273
Property	307,524	3,031,657	3,339,181
Professional services	56,269	201,538	257,807
Office	562,814	23,182	585,996
Equipment	209,024	14,579	223,603
Media	561,502	131	561,633
Other	808,933	18,626	827,559
Total	\$ 16,702,778	\$ 6,002,886	\$ 22,705,664

	2022		
	Program	Management and General	Total
Personnel	\$ 13,450,538	\$ 2,012,084	\$ 15,462,622
Net periodic pension and postretirement cost	102,977	15,405	118,382
Travel	376,277	7,643	383,920
Property	244,739	3,266,237	3,510,976
Professional services	13,909	208,855	222,764
Office	781,743	88,986	870,729
Equipment	212,943	14,643	227,586
Media	415,069	-	415,069
Other	563,036	114,620	677,656
Total	\$ 16,161,231	\$ 5,728,473	\$ 21,889,704

The accompanying notes are an integral part of the financial statements.

CONNECTICUT EDUCATION ASSOCIATION, INC.

Statements of Cash Flows

For the years ended June 30, 2023 and 2022

	2023	2022
Cash flows from operating activities:		
Change in net assets	\$ 6,058,787	\$ 6,563,076
Adjustments to reconcile change in net assets to net change in cash from operating activities:		
Depreciation	816,028	802,601
Realized and unrealized (gains)/losses on investments	(4,660)	3,230,101
Change in assets and liabilities:		
Dues receivable	454,171	40,539
Other assets	11,080	363,226
Accounts payable and other accrued expenses	840,854	(38,021)
Dues payable to National Education Association	10,550	29,934
Accrued compensated absences and severance	(378,358)	(67,758)
Accrued postretirement benefits other than pension	(2,433,191)	(1,418,211)
Accrued postretirement pension benefits	(4,426,121)	(9,360,934)
Net change in cash from operating activities	949,140	144,553
Cash flows from investing activities:		
Purchase of building improvements	(126,050)	-
Purchases of marketable securities	(12,157,509)	(5,614,200)
Sales and maturities marketable securities	11,656,047	5,166,002
Net change in cash from investing activities	(627,512)	(448,198)
Net change in cash	321,628	(303,645)
Cash and cash equivalents, at beginning of year	8,254,860	8,558,505
Cash and cash equivalents, at end of year	\$ 8,576,488	\$ 8,254,860

The accompanying notes are an integral part of the financial statements.

CONNECTICUT EDUCATION ASSOCIATION, INC.

Notes to Financial Statements

June 30, 2023 and 2022

NOTE 1 - ORGANIZATION AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Organization - Connecticut Education Association, Incorporated (the "Association") is a not-for-profit membership organization of approximately 44,200 elementary and secondary public school teachers, students and retired teachers. The Association has approximately 160 local affiliates and is affiliated with the 3 million member National Education Association ("NEA") based in Washington, D.C. The Association provides direct services to each of its local affiliates in the areas of negotiations, grievances, public relations and professional development.

Basis of Accounting - The financial statements of the Association have been prepared on the accrual basis of accounting.

Basis of Presentation - Financial statement presentation follows the Financial Statements for Not-for-Profit Organizations topic of the FASB codification. The Foundation reports information regarding its financial position and activities according to two classes of net assets:

Net Assets without Donor Restrictions – Net assets not subject to donor-imposed stipulations. Funds may be designated by the board.

Net Assets with Donor Restrictions – Net assets subject to donor imposed stipulations that may or will be met by actions of the Association and/or the passage of time. The Association had no net assets with donor restrictions at June 30, 2023 and 2022.

Use of Estimates - The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of financial statements, and the reported amounts of revenues and expenses during the reporting period. Actual results could differ from those estimates.

Cash and Cash Equivalents - The Association considers all highly liquid investments with an original maturity of three months or less to be cash equivalents.

Marketable Securities - Investments are stated at fair market value. Unrealized gains and losses are included in the change in net assets in the accompanying statements of activities.

Revenue Recognition

Dues - The Association's performance obligation is to provide advocacy services to its members. These services are provided over the term of the membership period and accordingly member dues revenue is recognized over that time period, which is generally one year. Dues are paid by members on a bi-weekly basis to local affiliates who then remit payments to the Association. The Association collects dues from state members of the NEA and forwards them to NEA on a regular basis. Dues collected on behalf of NEA are not included in the Association's statements of activities. Dues are not refundable. The Association records accounts receivable for NEA dues not yet collected from the state members and accounts payable for NEA dues not yet forwarded to NEA.

Building rental and garage income - The Association occupies approximately one and one half full floors of Capitol Place and is either currently leasing (or is seeking to lease) the other six floors to unaffiliated third parties. The Association's performance obligation is to provide office space and maintain common areas. Rental income is recognized monthly; prepayments of rent are recorded as deferred income. Leases typically range from five to fifteen years.

NOTE 1 - ORGANIZATION AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

NEA support and reimbursements - The Association receives funding from NEA to offset the cost of Unified Service Model ("Uniserv") representatives. The Association's performance obligation is to staff certain positions, and revenue is recognized as direct expenditures are incurred for those positions.

Fair Value Measurements - Financial Accounting Standards Board ("FASB") *Accounting Standards Codification* ("ASC") 820, *Fair Value Measurements*, provides the framework for measuring fair value. The framework provides a fair value hierarchy that prioritizes the inputs to valuation techniques used to measure fair value. The hierarchy gives the highest priority to unadjusted quoted prices in active markets for identical assets or liabilities (Level 1 measurements) and the lowest priority to unobservable inputs (Level 3 measurements).

The three levels of the fair value hierarchy under FASB ASC 820 are described as follows:

Level 1 - inputs are based upon unadjusted quoted prices for identical instruments traded in active markets.

Level 2 - inputs are based upon quoted prices for similar instruments in active markets, quoted prices for identical or similar instruments in markets that are not active, and model-based valuation techniques for which all significant assumptions are observable in the market or can be corroborated by observable market data for substantially the full term of the assets or liabilities.

Level 3 - inputs are generally unobservable and typically reflect management's estimates of assumptions that market participants would use in pricing the asset or liability. The fair values are therefore determined using model-based techniques that include option pricing models, discounted cash flow models, and similar techniques.

The asset's or liability's fair value measurement level within the fair value hierarchy is based on the lowest level of any input that is significant to the fair value measurement. Valuation techniques used need to maximize the use of observable inputs and minimize the use of unobservable inputs.

The following is a description of the valuation methodologies used for assets measured at fair value.

Short-term investments - Valued at the accounts' closing balance at year end.

Equities and fixed income - Valued using observable quoted prices for identical assets in active markets.

There have been no changes in the methodologies used at June 30, 2023 and 2022.

Land, Buildings and Equipment - Land is stated at cost. Buildings and equipment are stated at cost less accumulated depreciation. Depreciation is computed using the straight-line method over estimated useful lives ranging from 3 to 40 years. Costs in excess of \$5,000 that extend the useful lives of fixed assets are capitalized. Expenditures for normal repairs and maintenance are charged to operations as incurred.

Federal and State Income Taxes - The Association is a 501(c)(5) tax-exempt organization, which is exempt from federal and state income tax under the Internal Revenue Code. However, income from certain activities not directly related to the Association's tax-exempt purpose is subject to taxation as unrelated business income. Taxes paid are included in other expenses.

Generally Accepted Accounting Principles (GAAP) requires management to evaluate tax positions taken and to recognize a tax liability (or asset) if the Association has taken an uncertain position that more likely than not would not be sustained upon examination by the Internal Revenue Service. Management has analyzed the tax positions taken by the Association, and has concluded that as of June 30, 2023 and 2022, there are no uncertain positions taken or expected to be taken that would require recognition of a liability (or asset) or disclosure in the financial statements. The Association is subject to routine audits by taxing jurisdictions; however, there are currently no audits for any tax periods in progress. Management believes that it is no longer subject to income tax examinations for years prior to 2020.

NOTE 1 - ORGANIZATION AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES (CONTINUED)

Functional Expenses - The costs of providing programs and support have been reported on a functional basis in the statements of activities and functional expenses. Accordingly, certain costs have been allocated among the programs and supporting services benefited. Personnel costs and other expenses are allocated based on actual time and effort. Property costs are allocated based on square footage. All other costs are directly charged to the appropriate functional categories.

Subsequent Events Measurement Date - The Association monitored and evaluated any subsequent events for footnote disclosures or adjustments required in its financial statements for fiscal year ended June 30, 2023 through February 2, 2024, the date on which the financial statements were available to be issued.

NOTE 2 – LIQUIDITY AND AVAILABILITY

The following represents the Association’s financial assets available to meet general expenditures over the next twelve months at June 30,:

	<u>2023</u>	<u>2022</u>
Cash and cash equivalents	\$ 8,576,488	\$ 8,254,860
Marketable securities	19,919,846	19,413,724
Dues receivable	788,115	1,242,286
	<u>29,284,449</u>	<u>28,910,870</u>
Total financial assets	29,284,449	28,910,870
Less reserve funds designated by board by-laws	<u>(16,422,109)</u>	<u>(16,485,355)</u>
	<u>\$ 12,862,340</u>	<u>\$ 12,425,515</u>
Total financial assets available to meet general expenditures within twelve months	<u>\$ 12,862,340</u>	<u>\$ 12,425,515</u>

The Association maintains internal funds which are board-designated for potential contingencies, which can only be spent in accordance with its by-laws.

NOTE 3 - MARKETABLE SECURITIES

Marketable securities consist of the following and are measured at fair value using Level 1 inputs at June 30,:

	<u>2023</u>	<u>2022</u>
Short term investments	\$ 1,507,489	\$ 1,082,162
Corporate bonds	4,814,146	4,991,726
Municipal bonds	2,730,176	2,796,621
Preferred security bonds	419,285	470,740
U.S. agency bonds	2,178,722	742,658
Fixed income mutual funds	850,013	856,821
Total fixed income	<u>10,992,342</u>	<u>9,858,566</u>
Equities mutual funds	648,960	1,925,126
Equities stocks	6,771,055	6,547,870
Total equities	<u>7,420,015</u>	<u>8,472,996</u>
Total	<u>\$ 19,919,846</u>	<u>\$ 19,413,724</u>

NOTE 3 - MARKETABLE SECURITIES (CONTINUED)

The reconciliation of the Association's marketable securities is as follows at June 30,:

	<u>2023</u>	<u>2022</u>
Marketable securities, beginning of year	\$ 19,413,724	\$ 22,195,627
Investment return:		
Interest and dividends	625,978	586,222
Realized gains/(losses)	(964,690)	588,491
Unrealized gains/(losses)	969,350	(3,818,592)
Asset management fees	(124,516)	(138,024)
	<u>506,122</u>	<u>(2,781,903)</u>
Marketable securities, end of year	<u>\$ 19,919,846</u>	<u>\$ 19,413,724</u>

NOTE 4 - DUES RECEIVABLE

The balances of accounts receivable and liabilities relating to contracts with customers were as follows:

	<u>Dues Receivable</u>	<u>Contract Liabilities</u>
July 1, 2021	\$ 1,282,825	\$ -
June 30, 2022	1,242,286	-
June 30, 2023	788,115	-

NOTE 5 - LAND, BUILDINGS AND EQUIPMENT

The following is a summary of land, buildings and equipment at June 30,:

	<u>2023</u>	<u>2022</u>
Land	\$ 430,276	\$ 430,276
Buildings and improvements	29,241,674	29,115,624
Furniture and equipment	787,827	787,827
	<u>30,459,777</u>	<u>30,333,727</u>
Total	30,459,777	30,333,727
Less accumulated depreciation	<u>(23,471,071)</u>	<u>(22,655,043)</u>
Land, buildings, and equipment, net	<u>\$ 6,988,706</u>	<u>\$ 7,678,684</u>

NOTE 6 - CONCENTRATIONS

Two unions subject to collective bargaining agreements represent approximately 80% of the Association’s employees for the years ended June 30, 2023 and 2022, respectively. The collective bargaining agreement for professional staff expires June 30, 2027 and the agreement for the associate staff expires on June 30, 2024.

The Association maintains its cash in bank deposit accounts that, at times, may exceed federally insured limits. The Association has not experienced any losses in any cash accounts and believes it is not exposed to significant credit risk on cash.

NOTE 7 - COMMITMENTS AND CONTINGENCIES

The Association is, from time to time, subject to legal proceedings and claims that arise in the ordinary course of business. In the opinion of management, the amount of ultimate liability with respect to any outstanding actions will not materially affect the financial position of the Association.

NOTE 8 - LEASE COMMITMENTS

Rental Income - Included in buildings and improvements in Note 5 is the Association’s property located at 21 Oak Street, Hartford, CT (“Capitol Place”), of which a portion is rented to unrelated third parties. Leases typically range from five to fifteen years. The estimated committed rental income from leases is as follows for the years ending June 30:

2024	\$ 1,400,226
2025	1,045,376
2026	733,236
2027	352,445
2028	166,716
Thereafter	<u>985,785</u>
Total	<u>\$ 4,683,784</u>

NOTE 9 - RELATED PARTY TRANSACTIONS

Connecticut Education Association Political Action Committee’s (“CEA-PAC”) Board of Directors is made up of CEA board members and staff. CEA-PAC disburses contributions to support local politicians.

Connecticut Education Foundation (the “Foundation”) board of directors is made up of CEA board members and staff. The Foundation is a separately incorporated group established by donations from the Association. Income is used to provide emergency aid to members of the Association, scholarships for those entering the teaching profession and assistance to children.

NOTE 10 - RETIREMENT PLAN

The Association offers a 401(k) retirement plan to eligible employees. Employees who are twenty-one years of age, work full time and are employed for one-year with the Association are eligible to receive employer-matching contributions. Connecticut Education Association Professional Staff Organization (“CEAPSO”) employees are paid out to the 403(b) retirement plan equal to 2.5 days of their severance at the time of their anniversary with the Association. Total employer contributions for the years ended June 30, 2023 and 2022 were \$428,968 and \$344,287, respectively.

NOTE 11 - PENSION PLAN AND OTHER POSTRETIREMENT BENEFITS

The Association has a defined benefit pension plan covering substantially all employees. The pension plan is contributory at 4% of pay for new CAPSO and managerial employees hired after June 30, 2004 and for ASOCEA and confidential employees hired after June 30, 2005. The pension plan is noncontributory for all other employees. Pension benefits are based on years of credited service and employees' average annual earnings, as defined in the Plan. The Association's funding policy is to make the minimum annual contribution required by applicable regulations. Contributions are intended to provide not only for benefits attributed to service to date but also for those expected to be earned in the future. Expected Association contributions for the year ending June 30, 2023 are \$2,962,000.

The Association also provides postretirement health care benefits for employees who retire and immediately commence pension benefits after reaching retirement age. The plan is non-contributory for employees hired prior to June 30, 1994. For employees hired subsequent to this date, contribution rates vary by employment classification, date of hire, and years of service at retirement. During the year ended June 30, 2002, the Association established a voluntary employees' beneficiary association ("VEBA") and began funding postretirement health care benefits. Expected Association contributions for the year ending June 30, 2023 are \$992,000.

The annual measurement date is June 30 for the pension benefits and other postretirement benefits. The following tables provide further information about the Association's pension and postretirement benefit plans.

	2023	2022	2023	2022
<i><u>Change in Projected Benefit Obligation:</u></i>				
Projected benefit obligation, beginning of year	\$ 49,743,207	\$ 64,031,997	\$ 20,540,318	\$ 24,425,322
Service cost	1,397,109	2,279,956	517,572	758,840
Interest cost	2,241,416	1,736,398	903,715	659,905
Actuarial gain/loss	(2,213,516)	(14,380,185)	(1,790,279)	(4,549,550)
Benefits disbursed from plan assets	(2,836,694)	(4,250,407)	(811,385)	(754,199)
Employee contributions	344,319	325,448	-	-
Projected benefit obligation, end of year	<u>\$ 48,675,841</u>	<u>\$ 49,743,207</u>	<u>\$ 19,359,941</u>	<u>\$ 20,540,318</u>
<i><u>Change in Plan Assets:</u></i>				
Total fair value of plan assets, beginning of year	\$ 38,979,993	\$ 43,907,849	\$ 16,751,056	\$ 19,217,849
Actual return on plan assets	2,939,130	(5,614,897)	1,252,814	(2,466,793)
Employer contributions	2,912,000	4,612,000	811,385	754,199
Employee contributions	344,319	325,448	-	-
Benefits disbursed from plan assets	(2,836,694)	(4,250,407)	(811,385)	(754,199)
Total fair value of plan assets, end of year	<u>\$ 42,338,748</u>	<u>\$ 38,979,993</u>	<u>\$ 18,003,870</u>	<u>\$ 16,751,056</u>
<i><u>Funded Status:</u></i>				
Actuarial present value of projected obligation	\$ (48,675,841)	\$ (49,743,207)	\$ (19,359,941)	\$ (20,540,318)
Plan assets at fair value	42,338,748	38,979,993	18,003,870	16,751,056
Unfunded status	(6,337,093)	(10,763,214)	(1,356,071)	(3,789,262)
Liability for pension benefits	<u>\$ (6,337,093)</u>	<u>\$ (10,763,214)</u>	<u>\$ (1,356,071)</u>	<u>\$ (3,789,262)</u>
<i><u>Components of Net Periodic Pension Benefits Cost:</u></i>				
Service cost	\$ 1,397,109	\$ 2,279,956	\$ 517,572	\$ 758,840
Interest cost	2,241,416	1,736,398	903,715	659,905
Expected return on plan assets	(2,762,467)	(3,117,757)	(1,167,645)	(1,357,893)
Amortization of unrecognized net loss	832,361	1,761,327	352,299	436,402
Net periodic pension benefit cost	<u>\$ 1,708,419</u>	<u>\$ 2,659,924</u>	<u>\$ 605,941</u>	<u>\$ 497,254</u>

NOTE 10 - PENSION PLAN AND OTHER POSTRETIREMENT BENEFITS (CONTINUED)

	Pension Benefits		Other Benefits	
	2023	2022	2023	2022
Discount rate	5.00%	4.50%	5.00%	4.50%
Post retirement interest rate	5.00%	4.50%	4.50%	4.50%
Expected long-term rate of return on plan assets	7.00%	7.00%	7.00%	7.00%
Rate of compensation increase	1.00%	1.00%	N/A	N/A

The reason for the significant gain is related to the change in the discount rate for the period and market returns.

The Association's pension plan and other benefits weighted-average asset allocation were as follows at June 30,:

	Pension Benefits		Other Benefits	
	2023	2022	2023	2022
Cash and cash equivalents	100.0%	5.2%	100.0%	5.2%
Equity securities	0.0%	49.4%	0.0%	57.5%
Fixed income	0.0%	45.4%	0.0%	37.3%
Total	100.00%	100.00%	0.00%	94.84%

Marketable securities consisted of the following at June 30,:

	Pension Benefits		Other Benefits	
	2023	2022	2023	2022
Cash and cash equivalents	\$ 42,338,748	\$ 2,014,899	\$ 18,003,870	\$ 864,947
Equity	-	19,248,932	-	9,632,915
Fixed income	-	17,716,162	-	6,253,194
Total	\$ 42,338,748	\$ 38,979,993	\$ 18,003,870	\$ 16,751,056

The following tables present investments at fair value on a recurring basis at June 30, 2023:

	Pension Benefits			Total
	Level 1	Level 2	Level 3	
Cash and cash equivalents	\$ 42,338,748	\$ -	\$ -	\$ 42,338,748
Equity	-	-	-	-
Fixed income	-	-	-	-
Total	\$ 42,338,748	\$ -	\$ -	\$ 42,338,748

	Other Benefits			Total
	Level 1	Level 2	Level 3	
Cash and cash equivalents	\$ 18,003,870	\$ -	\$ -	\$ 18,003,870
Equity	-	-	-	-
Fixed income	-	-	-	-
Total	\$ 18,003,870	\$ -	\$ -	\$ 18,003,870

NOTE 10 - PENSION PLAN AND OTHER POSTRETIREMENT BENEFITS (CONTINUED)

The following tables present investments at fair value on a recurring basis at June 30, 2022:

	Pension Benefits			
	Level 1	Level 2	Level 3	Total
Cash and cash equivalents	\$ 2,014,899	\$ -	\$ -	\$ 2,014,899
Equity	19,248,932	-	-	19,248,932
Fixed income	14,954,744	2,761,418	-	17,716,162
Total	<u>\$ 36,218,575</u>	<u>\$ 2,761,418</u>	<u>\$ -</u>	<u>\$ 38,979,993</u>

	Other Benefits			
	Level 1	Level 2	Level 3	Total
Cash and cash equivalents	\$ 864,947	\$ -	\$ -	\$ 864,947
Equity	9,632,915	-	-	9,632,915
Fixed income	5,662,576	590,618	-	6,253,194
Total	<u>\$ 16,160,438</u>	<u>\$ 590,618</u>	<u>\$ -</u>	<u>\$ 16,751,056</u>

The following is a description of the valuation methodologies used for assets measured at fair value. There have been no changes in the methodologies used at June 30, 2023 and 2022.

Equity and fixed income: Valued using observable quoted prices for identical assets in active markets.

The methods described above may produce a fair value calculation that may not be indicative of net realizable value or reflective of future fair values. Furthermore, while the Plan believes its valuation methods are appropriate and consistent with other market participants, the use of different methodologies or assumptions to determine the fair value of certain financial instruments could result in a different value measurement at the reporting date.

The Association's investment policy is to manage the Plans with long-term objectives; with little concern for high current income or the need to maintain ready-cash reserves beyond those necessary to pay current benefits for the Plans; and with the intent to achieve the highest long-term rate of return practicable without jeopardizing the Association's funding policy or creating undue funding volatility.

The Association's overall investment strategy is to achieve a mix of approximately 50% of investments for long term growth and 50% for near term benefit payments with a diversification of asset types, fund strategies, and fund managers. The potential ranges for total equity exposure is between 40% and 60%, whereas the potential ranges for total bond exposure is between 38% and 58%. Cash or cash equivalents is maintained at 2%. Equity securities include investments in companies located both within and outside the United States. Fixed income securities include domestic and international bonds of companies from diversified industries and U.S. Treasuries.

The following benefits are expected to be paid during the years ending June 30:

	Pension Benefits	Other Benefits
2024	\$ 2,263,000	\$ 992,174
2025	2,505,000	1,002,609
2026	2,658,000	1,067,082
2027	2,820,000	1,192,221
2028	2,993,000	1,289,334
2029-2033	15,831,000	6,966,564

CONNECTICUT EDUCATION FOUNDATION, INC.

Financial Statements

June 30, 2023 and 2022

(With Independent Auditors' Report Thereon)

INDEPENDENT AUDITORS' REPORT

To the Board of Directors of
Connecticut Education Foundation, Inc.

Opinion

We have audited the accompanying financial statements of Connecticut Education Foundation, Inc. (a nonprofit organization, "CEF"), which comprise the statements of financial position as of June 30, 2023 and 2022, and the related statements of activities and cash flows for the years then ended, and the related notes to the financial statements.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of CEF as of June 30, 2023 and 2022, and the changes in its net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinion

We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Our responsibilities under those standards are further described in the Auditors' Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of CEF and to meet our other ethical responsibilities in accordance with the relevant ethical requirements relating to our audits. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Responsibilities of Management for the Financial Statements

Management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about CEF's ability to continue as a going concern within one year after the date that the financial statements are available to be issued.

Auditors' Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditors' report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with generally accepted auditing standards will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with generally accepted auditing standards, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of CEF's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about CEF's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control related matters that we identified during the audit.

Hartford, Connecticut
March 8, 2024

CONNECTICUT EDUCATION FOUNDATION, INC.

Statements of Financial Position

June 30, 2023 and 2022

	<u>2023</u>	<u>2022</u>
Assets:		
Cash	\$ 100,958	\$ 106,304
Marketable securities	<u>646,548</u>	<u>575,688</u>
Total assets	<u>\$ 747,506</u>	<u>\$ 681,992</u>
Net assets without donor restrictions:		
Board-Designated:		
Boland	\$ 34,425	\$ 36,875
Minority Scholarship	41,842	41,792
Children's Fund	600,289	555,763
Digiovanni Fund	47,613	47,562
Read Across America Fund	22,928	-
Holiday Bear Fund	<u>409</u>	<u>-</u>
Total net assets	<u>\$ 747,506</u>	<u>\$ 681,992</u>

The accompanying notes are an integral part of the financial statements.

CONNECTICUT EDUCATION FOUNDATION, INC.

Statements of Activities

For the years ended June 30, 2023 and 2022

	<u>2023</u>	<u>2022</u>
Changes in net assets without donor restrictions:		
Revenues		
Contributions	\$ 63,316	\$ 23,152
Fundraising income	54,798	67,277
Investment income/(loss), net	<u>70,861</u>	<u>(94,179)</u>
Total revenues	<u>188,975</u>	<u>(3,750)</u>
Expenses		
Program - grants and aid	87,431	44,954
Fundraising - events	<u>36,030</u>	<u>49,840</u>
Total expenses	<u>123,461</u>	<u>94,794</u>
Change in net assets	<u>65,514</u>	<u>(98,544)</u>
Net assets, beginning of year	<u>681,992</u>	<u>780,536</u>
Net assets, end of year	<u><u>\$ 747,506</u></u>	<u><u>\$ 681,992</u></u>

The accompanying notes are an integral part of the financial statements.

CONNECTICUT EDUCATION FOUNDATION, INC.

Statements of Cash Flows

For the years ended June 30, 2023 and 2022

	2023	2022
Cash flows from operating activities:		
Change in net assets	\$ 65,514	\$ (98,544)
Adjustments to reconcile change in net assets to net change in cash from operating activities:		
Realized and unrealized (gain)/loss on investments	(56,505)	98,428
Net change in cash from operating activities	9,009	(116)
Cash flows from investing activities:		
Purchase of investments/reinvested interest and dividends	(14,355)	(4,249)
Net change in cash	(5,346)	(4,365)
Cash at beginning of year	106,304	110,669
Cash at end of year	\$ 100,958	\$ 106,304

The accompanying notes are an integral part of the financial statements.

CONNECTICUT EDUCATION FOUNDATION, INC.

Notes to Financial Statements

June 30, 2023 and 2022

NOTE 1 - ORGANIZATION AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Organization - Connecticut Education Foundation, Inc. (the "Foundation") is a not-for-profit organization established November 2, 1991 by a donation from the Connecticut Education Association, Inc. (the "Association"). The Foundation is a charitable organization established to provide emergency aid to members of the Association, to provide scholarships for those entering the teaching profession and to provide assistance to children in the classroom.

Basis of Accounting - The financial statements of the Foundation have been prepared on the accrual basis of accounting.

Basis of Presentation - Financial statement presentation follows the Financial Statements for Not-for-Profit Organizations topic of the FASB codification. The Foundation reports information regarding its financial position and activities according to two classes of net assets:

Net Assets without Donor Restrictions – Net assets which are not subject to donor-imposed stipulations. Net assets without donor restrictions may be designated for specific purposes by action of the Board of Directors.

Net Assets with Donor Restrictions – Net assets subject to donor imposed stipulations that may or will be met by actions of the Foundation and/or the passage of time. The Foundation had no net assets with donor restrictions at June 30, 2023 and 2022.

Contributions - The Foundation receives contributions from teachers and the general public. Contributions are recognized when the donor makes a promise to give to the Foundation that is, in substance, unconditional. Contributions that are restricted by the donor to a specific purpose are shown as increases in net assets with donor restrictions. This revenue is reclassified to net assets without donor restrictions when the time or purpose restrictions are met.

Use of Estimates - The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of financial statements, and the reported amounts of revenues and expenses during the reporting period. Actual results could differ from those estimates.

Marketable Securities - Marketable securities are stated at fair market value. Unrealized gains/(losses) are included in the change in net assets in the accompanying statements of activities.

NOTE 1 - ORGANIZATION AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES - (CONTINUED)

Fair Value Measurements - Financial Accounting Standards Board (“FASB”) *Accounting Standards Codification* (“ASC”) 820, *Fair Value Measurements*, provides the framework for measuring fair value. That framework provides a fair value hierarchy that prioritizes the inputs to valuation techniques used to measure fair value. The hierarchy gives the highest priority to unadjusted quoted prices in active markets for identical assets or liabilities (Level 1 measurements) and the lowest priority to unobservable inputs (Level 3 measurements).

The three levels of the fair value hierarchy under FASB ASC 820 are described as follows:

Level 1 - inputs are based upon unadjusted quoted prices for identical instruments traded in active markets.

Level 2 - inputs are based upon quoted prices for similar instruments in active markets, quoted prices for identical or similar instruments in markets that are not active, and model-based valuation techniques for which all significant assumptions are observable in the market or can be corroborated by observable market data for substantially the full term of the assets or liabilities.

Level 3 - inputs are generally unobservable and typically reflect management's estimates of assumptions that market participants would use in pricing the asset or liability. The fair values are therefore determined using model-based techniques that include option pricing models, discounted cash flow models, and similar techniques.

The asset's or liability's fair value measurement level within the fair value hierarchy is based on the lowest level of any input that is significant to the fair value measurement. Valuation techniques used need to maximize the use of observable inputs and minimize the use of unobservable inputs.

The following is a description of the valuation methodologies used for assets measured at fair value.

Short-term investments – Valued at the accounts' closing balance at year end.

Mutual funds – Valued using observable market quoted prices for identical assets in active markets.

There have been no changes in the methodologies used at June 30, 2023 and 2022.

Federal and State Income Taxes - The Foundation is a 501(c)(3) charitable organization, which is exempt from income tax under the Internal Revenue Code.

Functional Expenses - Program expenses consist of grants and aid. Fundraising expenses are related to special events. All costs are directly charged and no estimations for allocation are necessary.

Subsequent Events Measurement Date - The Foundation monitored and evaluated any subsequent events for footnote disclosures or adjustments required in its financial statements for the year ended June 30, 2023 through March 8, 2024, the date on which financial statements were available to be issued.

NOTE 2 - LIQUIDITY AND AVAILABILITY

The following represents the Foundation's financial assets available to meet general expenditures over the next twelve months at June 30,:

	2021	2020
Cash	\$ 100,958	\$ 106,304
Marketable securities	646,548	575,688
Total financial assets	747,506	681,992
Less Board-designated funds	(747,506)	(681,992)
Total financial assets available to meet general expenditures over the next twelve months	\$ -	\$ -

As of June 30, 2023 and 2022, the Foundation has available \$747,506 and \$681,992, respectively, of Board-designated funds. Expenses are paid through fundraising and contributions.

NOTE 3 - MARKETABLE SECURITIES

Marketable securities consist of the following at June 30:

	2023	2022
Short term investments	\$ 4,808	\$ 3,885
Bonds and bond mutual funds	70,162	56,461
Equity mutual funds	571,578	515,342
Total marketable securities	\$ 646,548	\$ 575,688

Fair values of marketable securities were measured on a recurring basis using Level 1 inputs at June 30, 2023 and 2022.

Investment income for the years ended June 30, 2023 and 2022 consisted of:

	2023	2022
Investment return:		
Interest and dividends	\$ 20,161	\$ 11,007
Realized and unrealized gains/(losses)	56,505	(98,428)
Asset management fees	(5,805)	(6,758)
Investment income, net	\$ 70,861	\$ (94,179)

NOTE 4 - RELATED PARTY TRANSACTIONS

The Foundation is related to the Association. The entire leadership of the Foundation consists of the Association's Executive Director, Vice President and three Board members. During the years ended June 30, 2023 and 2022, the Association contributed \$19,550 and \$15,200, respectively, to cover grants paid from the Boland Fund. The Association also provides indirect operating expenses and office support services to the Foundation. The costs of such services provided by the Association are not material and have not been included in the financial statements of the Foundation.

DRAFT

**CONNECTICUT EDUCATION ASSOCIATION, INC.
POLITICAL ACTION COMMITTEE**

Financial Statements

June 30, 2023 and 2022

(With Independent Auditors' Report Thereon)

INDEPENDENT AUDITORS' REPORT

To the Board of Directors of
Connecticut Education Association, Inc. Political Action Committee

Opinion

We have audited the accompanying financial statements of Connecticut Education Association, Inc. Political Action Committee ("CEA-PAC"), which is administered by the Connecticut Education Association, Inc. (a not-for-profit corporation), which comprise the statements of financial position as of June 30, 2023 and 2022, and the related statements of activities and cash flows for the years then ended, and the related notes to the financial statements.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of CEA-PAC as of June 30, 2023 and 2022, and the changes in its net assets and its cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

Basis for Opinion

We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Our responsibilities under those standards are further described in the Auditors' Responsibilities for the Audit of the Financial Statements section of our report. We are required to be independent of CEA-PAC and to meet our other ethical responsibilities in accordance with the relevant ethical requirements relating to our audits. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Responsibilities of Management for the Financial Statements

Management is responsible for the preparation and fair presentation of the financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about CEA-PAC's ability to continue as a going concern within one year after the date that the financial statements are available to be issued.

Auditors' Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditors' report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with generally accepted auditing standards will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the financial statements.

In performing an audit in accordance with generally accepted auditing standards, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of CEA-PAC's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about CEA-PAC's ability to continue as a going concern for a reasonable period of time.

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control related matters that we identified during the audit.

Hartford, Connecticut
March 8, 2024

CONNECTICUT EDUCATION ASSOCIATION, INC.
POLITICAL ACTION COMMITTEE

Statements of Financial Position

June 30, 2023 and 2022

	<u>2023</u>	<u>2022</u>
Assets:		
Cash	<u>\$ 62,192</u>	<u>\$ 77,192</u>
Net assets:		
Net assets without donor restrictions	<u>\$ 62,192</u>	<u>\$ 77,192</u>

DRAFT

The accompanying notes are an integral part of the financial statements.

**CONNECTICUT EDUCATION ASSOCIATION, INC.
POLITICAL ACTION COMMITTEE**

Statements of Activities

For the years ended June 30, 2023 and 2022

	2023	2022
Changes in net assets without donor restrictions:		
Revenues:		
Contributions from CEA	\$ -	\$ 24,000
Program expenses:		
Political contributions	15,000	23,709
Change in net assets	(15,000)	291
Net assets, beginning of year	77,192	76,901
Net assets, end of year	\$ 62,192	\$ 77,192

DRAFT

The accompanying notes are an integral part of the financial statements.

**CONNECTICUT EDUCATION ASSOCIATION, INC.
POLITICAL ACTION COMMITTEE**

Statements of Cash Flows

For the years ended June 30, 2023 and 2022

	<u>2023</u>	<u>2022</u>
Cash flows from operating activities:		
Change in net assets	\$ (15,000)	\$ 291
Cash at beginning of year	<u>77,192</u>	<u>76,901</u>
Cash at end of year	<u>\$ 62,192</u>	<u>\$ 77,192</u>

DRAFT

The accompanying notes are an integral part of the financial statements.

**CONNECTICUT EDUCATION ASSOCIATION, INC.
POLITICAL ACTION COMMITTEE**

Notes to Financial Statements

June 30, 2023 and 2022

NOTE 1 - ORGANIZATION AND SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Organization - Connecticut Education Association, Inc. Political Action Committee ("CEA-PAC") is a committee maintained by Connecticut Education Association, Inc. (the "Association") for disbursing contributions to support local politicians and for local referendums.

Basis of Accounting - The financial statements of CEA-PAC have been prepared on the accrual basis of accounting.

Basis of Presentation - Financial statement presentation follows the Financial Statements for Not-for-Profit Organizations topic of the FASB codification. CEA-PAC reports information regarding its financial position and activities according to two classes of net assets:

Net Assets without Donor Restrictions – Net assets which are not subject to donor-imposed stipulations. Net assets without donor restrictions may be designated for specific purposes by action of the Board of Directors.

Net Assets with Donor Restrictions – Net assets subject to donor imposed stipulations that may or will be met by actions of the Foundation and/or the passage of time. CEA-PAC had no net assets with donor restrictions at June 30, 2023 and 2022.

Federal and State Income Taxes - CEA-PAC is a 527 political organization, which is exempt from income tax under Internal Revenue Code section 527(f)(3).

Contributions – CEA-PAC receives contributions from the Association. Contributions are recognized when the donor makes a promise to give to the CEA-PAC that is, in substance, unconditional. Contributions that are restricted by the donor to a specific purpose are shown as increases in net assets with donor restrictions. This revenue is reclassified to net assets without donor restrictions when the time or purpose restrictions are met.

Subsequent Events Measurement Date - CEA-PAC monitored and evaluated any subsequent events for footnote disclosures or adjustments required in its financial statements for fiscal year ended June 30, 2023 through March 8, 2024, the date on which financial statements were available to be issued.

Use of Estimates – The preparation of financial statements in conformity with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that affect the reported amounts of assets, liabilities, and disclosure of contingent assets and liabilities at the date of the financial statements, and the reported amounts of revenues and expenses during the reporting period. Actual results could differ from those estimates.

NOTE 2 – LIQUIDITY AND AVAILABILITY

As of June 30, 2023 and 2022, CEA-PAC has a cash balance of \$62,192 and \$77,192, respectively, available to meet general expenditures in the next twelve months.

NOTE 3 - RELATED PARTY TRANSACTIONS

CEA-PAC receives contributions based upon the amount budgeted within the Association's budget. The contribution is authorized by the representative assembly of the Association as a portion of the annual budget. There is no contribution to CEA-PAC for agency membership in the Association.

CEA-PAC does not incur any direct operating expenses or assume any liabilities to outside parties in connection with its operations since the fund is administered by the Association and all contributions to political candidates are funded when committed.

DRAFT



**CEA Board Meeting
March 8, 2024**

D. ACTION ITEMS:

1. Audit Approval
2. UniServ Funding
3. NEA RA Reimbursement
4. Teacher of the Year Support
5. HCR Awards

Agenda Item D-1

New Business Item _____

MOTION FORM

CONNECTICUT EDUCATION ASSOCIATION

Meeting BOARD OF DIRECTORS

Date March 8, 2024

Motion made by Joslyn DeLancey

Second Stephanie Wanzer

Move to accept the CEA audit presented by Whittlesey.

Rationale:

The CEA Executive Committee recommends acceptance of this audit

Cost: none

Benefit to CEA:

Executive Committee Recommendation

Approved Opposed No Recommendation Postponed

Referred to _____

Amended _____

Rationale: _____

Agenda Item D-2

New Business Item _____

MOTION FORM

CONNECTICUT EDUCATION ASSOCIATION

Meeting BOARD OF DIRECTORS

Date March 8, 2024

Motion made by Stephanie Wanzer

Second Joslyn DeLancey

Move to authorize the CEA President and Executive Director to approve the 2024-2025 UniServ Grant application.

Rationale:

A yearly motion to grant authority to submit the grant to NEA for UniServ reimbursement

Cost: none

Benefit to CEA:

Executive Committee Recommendation

Approved **Opposed** **No Recommendation** **Postponed**

Referred to _____

Amended _____

Rationale: _____

Agenda Item D-3

New Business Item

MOTION FORM

CONNECTICUT EDUCATION ASSOCIATION

Meeting BOARD OF DIRECTORS

Date March 8, 2024

Motion made by Stephanie Wanzer

Second Joslyn DeLancey

Move to accept the Finance Committee recommendation for travel reimbursement local delegates to the NEA RA 50% of their NEA RA transportation expenses up to \$150.00.

Rationale: _____

Cost:

Benefit to CEA:

Executive Committee Recommendation

Approved Opposed No Recommendation Postponed

Referred to _____

Amended _____

Rationale: _____



Finance Committee Meeting

February 1, 2024, Virtual

Draft Meeting Minutes

Attending: Wanzer, Petruzzi, G. Flaherty, Raabe, Cassells, Duffield, Record, Giblin, Dias, McCotter, DeLancey

1. Stephanie Wanzer called to order at 5:04 pm
2. Move to approve the January 8, 2024, minutes
MOTION: Petruzzi/Duffield **CARRIED**
3. CEA Audit Discussion-actuarial timeline
4. CEA Policy Discussion - Acquire targeted information from the BOD in strategic ways to get data to inform our suggestions for parameters to forward onto policy committee.
5. Reviewed grant proposal from Policy Committee-members would like feedback from the Board of Directors before making significant changes to program.
6. Discussion of the 2024/2025 Proposed Budget
Move to approve the proposed CEA 2024-2025 budget with \$0.76 dues increase for a total of \$511.00.
MOTION: G. Flaherty/DeLancey **CARRIED**
6. Discussion of RA Planning transportation costs to the NEA RA in Philadelphia.
 - 6a. Move to reimburse local delegates 50% of their NEA RA transportation expenses up to \$150.00.
MOTION: Duffield/Record **CARRIED**
 - 6b. Move to reimburse state delegates up to \$300.00 for their NEA RA transportation expenses.
MOTION: G. Flaherty/Giblin **CARRIED**
7. Next meeting Wednesday, February 8th 4pm, virtual
Meeting adjourned at 6:33

Respectfully submitted by Kathryn Petruzzi, Finance Secretary

Agenda Item D-4

New Business Item _____

MOTION FORM

CONNECTICUT EDUCATION ASSOCIATION

Meeting BOARD OF DIRECTORS

Date March 8, 2024

Motion made by Stephanie Wanzer

Second Joslyn DeLancey

Move to support the Teacher of the Year by becoming a Partner Sponsor for this program in the amount of \$1,000.00. Money to come out of Contingency

Rationale:

Connecticut Teacher of the year program highlights teachers and their accomplishments.

Cost: \$1,000.00

Benefit to CEA:

Executive Committee Recommendation

Approved **Opposed** **No Recommendation** **Postponed**

Referred to _____

Amended _____

Rationale: _____



The Connecticut Teacher of the Year Council
invites you to

BE A SPONSOR

of the Connecticut Teacher of the Year Program,
Connecticut's most prominent statewide teacher
recognition program.



The Connecticut Teacher of the Year Program is recognized throughout the state as Connecticut's premier teacher recognition program. School districts throughout the state participate in this prestigious program, nominating local teachers who have the opportunity to participate in a rigorous selection process with the hopes of becoming Connecticut's Teacher of the Year. Annually, Connecticut's superintendents escort their local teachers of the year to the Teacher of the Year Ceremony where they are joined by legislators, State Board of Education members, educational leaders, and family and friends in honoring these representatives of teaching excellence, as well as the individual chosen as Connecticut's Teacher of the Year.

The Connecticut Teacher of the Year Council invites you to be a sponsor of this respected program. Sponsorship offers you a unique opportunity to showcase your support of education throughout the state at all levels of the educational community. Our sponsors are not only recognized at our Annual Ceremony, an event which draws hundreds of attendees, but throughout the selection process which involves representatives of preeminent professional organizations. Sponsors are also invited to attend the Empowered to Lead Symposium, an annual event focused on current educational issues attended by hundreds of educators from throughout the state and region.

Sponsorship can take many forms. Whether you choose to sponsor a particular event, provide a gift to a teacher's classroom, or become a program sponsor, your monetary or in-kind contribution will allow you and your organization to be seen statewide as a supporter of excellence in education.

In this packet you will find:

- Overview of the Connecticut Teacher of the Year Council
- The Role of the Teacher of the Year
- List of Annual Events
- Benefits of Sponsorship

We hope you will consider this exciting opportunity to become one of our sponsors. Additional information is available upon request.

For more information, contact David Bosso (860-930-6668); davidbosso@gmail.com or Corey Nagle (860-690-0437); teachercollaborate@gmail.com

We look forward to hearing from you.

*"I am so thankful to have been given the opportunity this year to participate in many exciting professional development activities centered on teacher leadership presented by the Connecticut Teacher of the Year Council. I have been inspired and invigorated. **Through this experience, I have re-defined in my mind what it means to be a teacher leader.**"*

What is the Connecticut Teacher of the Year Council?

The Connecticut Teacher of the Year Council is an organization composed of past and present Connecticut Teachers of the Year, as well as individuals who represent distinguished organizations of Connecticut's educational community. **We are committed to the preservation and enhancement of the Connecticut Teacher of the Year Program.**

Specifically, the purpose of the Council is

- to encourage quality education for each individual through quality teaching;
- to recognize the excellence and commitment of professional educators;
- to promote best practices within and outside the profession;
- to represent teachers and students as policy partners on the state and national level;
- to promote the image of education through public awareness; and
- to annually provide funding, guidance, and resources for the Connecticut Teacher of the Year selection process and ceremony.

The Connecticut Teacher of the Year Council, in partnership with our sponsors and the Connecticut State Department of Education, develops programming aimed at engaging Teachers of the Year in activities and roles that allow them to share, learn, and advocate for best practices and policies in public education. Additionally, members of the Council serve on the Selection Committee for the Connecticut Teacher of the Year Program and play an integral role in designing and conducting the annual Teacher of the Year Ceremony, the annual Empowered to Lead Symposium, and other professional growth opportunities for our recognized teachers. **In an effort to preserve and improve the Connecticut Teacher of the Year Program, the Council works with corporate and organizational sponsors to provide funding for the program and resources for the Teacher of the Year.**

The Council is organized to operate as a non-profit entity and is a recognized 501(c)(3) organization. (EIN #27-2498234)



2023 Connecticut Teacher of the Year and National Teacher of the Year Finalist, Carolyn Kielma (L) and 2022 Connecticut Teacher of the Year, Kim King (R).

*"These twelve months have been incredible for so many reasons. The friendships, the knowledge, the memories, and the connections will remain with me for the remainder of my career. I am truly grateful to each and every person who played a part in creating this spectacular program. **I wish every Connecticut educator could have these experiences.**"*

The Role of the Connecticut Teacher of the Year

The Connecticut Teacher of the Year proudly represents the excellence of Connecticut's 49,000 classroom teachers, serving as an ambassador for public education.

The Teacher of the Year is selected from an applicant pool of local award winners from Connecticut's 169 school districts. Each local Teacher of the Year submits a portfolio, which is read and rated by the members of a Selection Committee organized by the State Department of Education and the Council. Semifinalists are asked to come to Hartford for interviews with the committee. Four finalists are chosen and the Selection Committee conducts extensive site visits to their respective schools, during which time candidates are observed while teaching and the committee speaks to colleagues, students, administrators, and parents.

The annual Teacher of the Year Ceremony is an evening of celebration. Under the proud banner of our sponsors, each local Teacher of the Year is recognized in front of family as well as school district officials. The evening culminates with the Teacher of the Year's first formal address.

"Thank you for the opportunity to interview for the CT Teacher of the Year. It was quite an honor to have the chance to talk to the committee and to share my perspective on teaching and learning. It is humbling to work among so many dedicated, outstanding educators, and it was incredibly gratifying to know how much time and care is devoted to this process."



Jahana Hayes, 2016 Connecticut Teacher of the Year and 2016 National Teacher of the Year, accepting her award from President Barack Obama. In 2018, she was elected to serve in the U.S. House of Representatives. Photo courtesy of NBC News, 2016.

As part of their tenure, the Connecticut Teacher of the Year speaks to both the educational community and the public-at-large. The Teacher of the Year speaks at education conferences and meetings, and addresses students, teachers, civic, governmental, college, and university groups. The Teacher of the Year is also likely to be called upon to serve on statewide committees and has many opportunities to interact with legislative and other governmental figures.

The Teacher of the Year's influence does not stop at the state's borders. Connecticut's representative joins State Teacher of the Year colleagues from around the nation as a participant in the National Teacher of the Year Program. Among many activities organized as a part of this professional experience, State Teachers of the Year attend national conferences, meet the President of the United States at the White House, and attend Space Camp in Huntsville, Alabama.

The National Teacher of the Year is selected after a rigorous review and interview process and is introduced by the President of the United States in a Rose Garden Ceremony at the White House. Once officially named, the National Teacher of the Year travels across the nation speaking at educational conferences, to legislative groups, the public, and other interested groups.

Wherever the Teacher of the Year goes, they have the opportunity to promote the Teacher of the Year Program and recognize the program's proud sponsors.



Meghan Hatch-Geary, 2020 Connecticut Teacher of the Year, at her official announcement ceremony, with Commissioner of Education (now U.S. Secretary of Education), Miguel Cardona (L) and Governor Ned Lamont (R). Photo courtesy of The Hartford Courant, 2020.



Sheena Graham, the 2019 Connecticut Teacher of the Year. Photo courtesy of *The Connecticut Post*, 2018.

“I just wanted to express my sincere gratitude for the opportunities offered during this past year. Beginning with the process of selection, the multitude of professional opportunities, and the amazing educators that I have been connected with, this has truly been the highlight of my teaching career. I have been inspired and elevated by the teachers and professionals that I have been fortunate to have engaged with.”

The Connecticut Teacher of the Year Council strives to design and implement timely, authentic, and impactful programming for recognized District Teachers of the Year from throughout Connecticut in order to enrich teachers’ skillsets in the areas of practice, policy, and advocacy. Feedback from participants is always positive, and many express a desire to remain engaged beyond their year of honor. The emphasis on cultivating teacher leader capacity is a driving force behind the professional growth opportunities the Council is able to offer, none of which are possible without the generous, ongoing support and commitment of our sponsors.



Members of the 2023 Semifinalist Cohort participating in the Mystic Seaport Museum Professional Development, one of the many memorable and rewarding programs offered each year.



Pictured (L-R) at the 2019 Empowered to Lead Symposium: Melissa Collins, 2023 Tennessee Teacher of the Year; Mandy Manning, 2018 National Teacher of the Year; Sydney Chaffee, 2017 National Teacher of the Year; Lauren Danner, 2017 Connecticut Teacher of the Year; Michael Dunlea, 2012 New Jersey State Teacher of the Year finalist.

“This was an amazing day. The entire experience was worthwhile and beneficial, and I walked away feeling inspired and motivated to continue to grow in my own profession and influence others to do the same.”

“What a superb opportunity to collaborate with other leaders who thrive to make a difference in our profession. I felt supported and validated. Days like this should happen more often.”

*“What an amazing way to start my year.
I feel re-charged!”*



“Wow!! What a terrific event today! I had a moment on my drive home to reflect on the day and how pleased I was to be with all of you.”



Members of the Connecticut Teacher of the Year Council at the Summer Celebration of Teaching and Learning in 2021. The Council is composed of Teachers of the Year, sponsor representatives, and educational stakeholders from across the state.



The Fall Social is an opportunity for Council members, major sponsors, and other guests to welcome and celebrate the new semifinalists cohort.

“Thank you so much for such an amazing opportunity! I am feeling inspired and motivated to share what I have learned during this celebration and to head into the new school year!”



“Thank you so much for including us in this event. It was truly special, and I am so inspired by the work of our Teachers of the Year and the Council.”

“As usual, the committee and sponsors did a phenomenal job to put together an event to celebrate and uplift our profession. I left feeling energized and inspired for the year ahead.”



*“Thank you for making that wonderful event happen.
It was just what I needed.”*



Kiana Foster-Mauro, 2024 Connecticut Teacher of the Year, at her official announcement ceremony, with Governor Ned Lamont (L) and Commissioner of Education, Charlene Russell-Tucker (L).

List of Annual Events

Fall Official Announcement of the Connecticut Teacher of the Year

Annual Fall Social

Annual Recognition Ceremony

Winter CEA Media Training

Meet the Authors Webinar

Mark Twain House and Professional Development

**Spring
and
Summer**

Annual Cohort Reunion

Empowered to Lead Symposium

Mohegan Tribe Reception

Mohegan Tribe Professional Development

Mystic Seaport Summer Institute



Members of the 2022 Semifinalist Cohort and Connecticut Teacher of the Year Council participate in a “Meet the Authors” event focusing on teacher leadership with 2012 National Teacher of the Year, Rebecca Mieliwocki, and 2009 California Teacher of the Year, Alex Kajitani.

“I have greatly appreciated all of the leadership opportunities and professional development opportunities provided to me by the Teacher of the Year Council.”

My toolbox of teacher leadership skills keeps growing, and I thank the Council for that!”

“Thank you for arranging such inspiring, enriching professional development programming for our cohort over the past year. I appreciate all the Council does to support and celebrate students and teachers!”

*“I want to thank the Connecticut Teacher of the Year Council for a wonderful year of honor and professional learning. I have said repeatedly that **this was the best year of growth I have had professionally in my 28 year career!**”*



Rochelle Brown, an elementary school teacher in Windsor, is the 2021 Connecticut Teacher of the Year.



Connecticut Teacher of the Year Council
EQUITY STATEMENT



The Connecticut Teacher of the Year Council recognizes and acknowledges that as a result of historic systemic inequalities, significant disparities in educational opportunities and outcomes exist among students. We believe that public education is the bedrock of a vibrant and just democracy, and we understand that since our nation's founding and to this present day, educational systems and structures have not been designed to serve and benefit all students in the United States equitably. Therefore, as educators, we have an obligation to fundamentally change these inequitable systems.

We are committed to creating schools and learning communities characterized by equity and justice so that all students may thrive and benefit from this democratic promise. The circumstances that children are born into should not determine their access to the resources necessary for their success. We recognize that in order to achieve such equity in education, we must understand systems of *inequity*, the roles we have played in maintaining them, and how we can revise, reframe, and re-envision our work to dismantle these systems and support equitable outcomes for all students.

As the Connecticut Teacher of the Year Council, we affirm our commitment to actions that deconstruct systemic inequity in education. We will collaborate on culturally responsive teaching methods that include a greater awareness of our students' backgrounds and cultures. We will work together to recognize and dismantle our own biases so that we can better support all of our students. We will commit to using our platforms, resources, influence, and voices to fight for inclusive and equitable teaching practices, and will support efforts to diversify the teaching workforce.

The Connecticut Teacher of the Year Council is an organization dedicated to celebrating teacher excellence, elevating the profession of teaching, developing teacher leaders, and providing opportunities for educators to strengthen their practice and share their talents and expertise with others. Therefore, as we pursue this work, and given our charge as educators, we pledge to focus on equity, diversity, and inclusion in all aspects of our organizational mission and vision.



Benefits of Sponsorship

	Platinum \$15,000	Gold \$10,000	Silver \$5,000	Partner \$1000	Friend \$500
Participation in annual Teacher of the Year Selection Process	◆				
Opportunity to Speak at annual Teacher of the Year Ceremony*	◆				
Logo on Ceremony Signage*	◆				
Sponsorship Recognized in Promotional Materials and Stationary	◆	◆			
Logo in Pre-Ceremony Display*	◆	◆	◆	◆	
Ceremony Program Book* Logo or Name, Company Profile	◆ (large logo)	◆ (large logo)	◆ (medium logo)	◆ (small logo)	◆ (name)
Invitation to Annual Fall Social+	◆	◆	◆		
Vendor Table at E2Lead**	◆	◆	◆	◆	◆
Logo in E2Lead Pre-event Display*	◆	◆	◆	◆	◆
E2Lead Program Book** Logo or Name, Company Profile	◆ (large logo)	◆ (large logo)	◆ (large logo)	◆ (medium logo)	◆ (name)
Free registration for up to two organizational representatives to attend E2Lead**	◆	◆	◆	◆	◆
Website Recognition (cttoycouncil.org) Logo or Name, Company Profile	◆ (large logo)	◆ (medium logo)	◆ (small logo)	◆ (name)	◆ (name)
Individual and Organizational Supporters (under \$500 will have name(s) listed in Ceremony Program Book, Pre-Ceremony Display, E2Lead Program Book, E2Lead Pre-event Display, and on our website.					

*The annual ceremony is attended by District Teachers of the Year and families, District Superintendents, the Commissioner of Education, State Board of Education members, elected officials, and other invited guests

**The Empowered to Lead Symposium is attended by District Teachers of the Year, district administrators, and other educational stakeholders.

+The Annual Fall Social is attended by Semifinalists, Council members, and other special guests.

For more information, contact David Bosso (860-930-6668); davidbosso@gmail.com or Corey Nagle (860-690-0437); teachercollaborate@gmail.com

Agenda Item D-5

New Business Item

MOTION FORM
CONNECTICUT EDUCATION ASSOCIATION

Meeting BOARD OF DIRECTORS

Date March 8, 2024

Motion made by Stephanie Wanzer

Second Joslyn DeLancey

Move to approve the HCR Awards

- 1) Joseph Goldman -The Mahatma Gandhi-Martin Luther King Jr. Peace Award
- 2) Jeanne-Marie McAnanly- CEA Humanitarian Award for Leadership in Recent Immigrant Educational and Community Relationships
- 3) Jessica Baldizon- Katherine Dunham Award

Rationale:

Cost:

Benefit to CEA:

Executive Committee Recommendation

Approved Opposed No Recommendation Postponed
 Referred to _____

Amended _____

Rationale: _____

***Nomination of Joseph Goldman
for the
Mahatma Gandhi-Martin Luther King Jr.
Peace Award***

On behalf of the Human and Civil Rights Commission, I nominate Joseph Goldman for this Human and Civil Rights Award. Joseph Goldman's work in his classroom and for the state qualify him for this prestigious award. His work meets the criteria by promoting the study of peace education materials to develop positive attitudes among educators/students and maintaining cooperative links with other groups concerned with peace.

The CEA Advisor did a wonderful job of highlighting the work that Joseph Goldman has done in education, following his recognition by Voices of Hope. Joseph Goldman was involved in the development of a genocide studies course for the state of Connecticut. Goldman's work on the genocide studies course included a reliance on primary sources, most importantly the stories of those directly impacted by the Holocaust. The genocide studies course examines not only past genocides such as the Holocaust, but also makes connections to current movements of hateful ideology. In this interview, Joseph Goldman addresses how his work addresses peace education in his classroom and for the state of Connecticut.

Respectfully submitted,
Michael McCotter

Connecticut Educator Takes Lead on Holocaust Curriculum

E.O. Smith teacher honored for developing course on genocide studies

Five years ago, when the Holocaust became a required part of Connecticut's secondary-level social studies curriculum, E.O. Smith High School history teacher Joe Goldman was asked to work on a specialized course on genocide studies.

In addition to feeling honored, he recalls immediately feeling the gravity of the assignment.

Goldman, who has been teaching for 14 years and has served as adjunct faculty for UConn's Teacher Certification Program, knew that the course would have to explore difficult topics in a way that was accurate, thoughtful, and meaningful. CEA-Retired member Jim Loughhead had originally developed the E.O. Smith course on genocide that forms the basis for Goldman's work in this area, and Goldman says, "He deserves enormous credit for building the foundation of our current class."

The power of primary sources Through books, movies, museum visits, and classroom discourse, Goldman leads students through the events leading up to the Nazis' systematic persecution of Jews and others throughout eastern Europe. But perhaps the most powerful learning comes from direct conversations with Holocaust survivors, witnesses to the painful history students have been studying. Survivor testimony and first-person perspective, Goldman says, are essential to his teaching of history.

In one Zoom meeting, students heard from Dr. Leon Chameides, a child during the Holocaust whose father arranged for him to be hidden by the Ukrainian Greek Catholic Church. Given a new identity and sent to live in a monastery in the mountains when he was seven, Chameides survived the war; his parents did not. Years later, he immigrated to the U.S., where he became a leading pediatric cardiologist in Hartford.

For student Collin Moffitt, hearing from Chameides helped put a face on the horrors of the Holocaust.

"Six million people? When you're given that number, it's just a statistic at this point," he told NPR reporter and PBS correspondent Diane Orson. "You don't have faces. You don't have names. And just seeing a real survivor talk about their experience puts things more in perspective."

Orson interviewed Goldman and several of his students in 2022 for a PBS *Outline* special on the rise of antisemitism in Connecticut and efforts to combat it through education. (Watch at [cptv.org/programs/antisemitism-rising-bearing-witness-then-and-now](https://www.cptv.org/programs/antisemitism-rising-bearing-witness-then-and-now).)

Fellow student Ben Peters added that today's

political rhetoric and hate speech is reminiscent of extreme ideas that took root in the 1930s—language that people became numb to and that eventually led to persecution and genocide. "People would say things like, 'Well, they say these bad things, but they're probably not going to do them. It'll be fine.'"

Goldman says that central to his coursework is not only exploring history but also examining current ideologies of hatred toward others, including anti-LGBTQ and anti-immigration sentiments. We spoke to him recently about his teaching.

Connecticut has experienced a rise in antisemitic incidents. Have you witnessed this?

I have at times observed students snickering or making light of antisemitism or Nazism, although overall at my school, students treat the issue with the weight and respect it deserves, and they take it seriously. E.O. Smith does a lot to raise the issues of equity and discrimination, and there's a culture of unwillingness to accept discrimination—but that doesn't mean it doesn't happen quietly or out of sight. My reaction is to encourage students to think about creating a culture that doesn't make it comfortable for anyone to speak or behave in discriminatory or offensive ways, and for teachers never to look the other way.

"Never again" can seem hard to believe given the rise in hate crimes and other movements we might have thought were behind us. After so much progress on understanding and inclusion, how do you reconcile the rise in intolerance?

In our classes we look at the fact that hate groups often thrive in areas that are economically struggling, so we look at economic access and injustice. Those families are more exposed and perhaps more vulnerable to hate groups. There are political aspects too.

I usually prepare students in my classes with the message that there are misconceptions people have about one another. I tell them it's OK to ask questions, and I ask about stereotypes or conspiracy theories they may have heard. We trace the histories of these beliefs.

How do you explain the rise of the Nazi party to your students?

One thing I've done that's interesting is give students the Nazi party platform from 1932—without telling them that's what it is—and I winnow it down and ask if students are open to voting for the candidate with that platform. Understandably, students are shocked that this was Hitler's platform and that even Jews voted for Hitler. So we grapple with why and what the priorities were at that time—repercussions from the Treaty of Versailles, people looking for a strong leader, someone to address the economy and violence in the streets.

Tell us about the power of survivors' stories.

This is really important to me and where I get very impassioned about the class I teach. We talk to survivors, and it's very powerful. I've learned that historically Holocaust survivors' testimony was considered unreliable, even during the Nuremberg trials; chief U.S. prosecutor Robert Jackson and others thought it was misremembered. They relied instead on documents, which they considered more useful pieces of evidence.

Teaching about the Holocaust similarly relied heavily on textbooks over survivor testimony. Now we see excluding testimony as a disservice, because we leave students with the impression

of a dehumanized population. How powerful when someone who experienced this horrible history comes and talks about it. Ruth Weiner came to my class to talk about escaping via Kindertransport, and I've never seen students break down in this way over the human connection. One student ran after Ruth crying that she was happy she survived.

Ruth called on students to turn on their lights one at a time in a dark room so that one by one they might drive away ignorance and darkness. Our students sent an illustration of their illuminated cell phones on the floor in the dark room and sent it to her.

Have you talked with students about the current war between Israel and Hamas?

Yes, the conflict in the Middle East has come up, and I have pushed my students to understand the complexity of the issue. Since the genocide class I teach focuses on humanity and the art of seeing those who might not share a common identity as human and worthy of dignity, I feel it's relevant. This, to me, is the root of the sort of work we have been trying to do at E.O. Smith and will keep working toward.

As it happens, this semester I am partnering with Connecticut author Daphne Geismar, who wrote the book *Invisible Years* about her family's experience during the Holocaust. She has been sharing her



Joe Goldman engages students in dialogue about difficult but important issues around genocide.

family's story with my students, and it turned into a collaboration spanning multiple weeks and culminating in a project where students write an interwoven narrative using the voices of victims of genocide from the past and weaving them together around a core theme. It has been a powerful and rewarding experience for students.

Daphne's father, a Holocaust survivor, was one of many Jews who relocated to Israel following World War II, where he was taken straight into the army.

"This is a very difficult subject," he says. "I have the philosophy that I don't want to do to somebody else what I don't want done to myself. The Palestinians have rights." He said he would be angry if "somebody came, took my house away, threw me out, and said, 'You have no home.' I know how that feels."

Daphne has called the violence in Israel senseless, and her relative Chaja also has a unique perspective on the violence that does not fit with what many view as the perspective of a supporter of Israel. While Daphne hasn't shared her views with the class yet, we have plans for her to address the issue with them in a way that will help students see the nuance of the situation, and, hopefully, recognize the humanity on both sides of the conflict and the reality that each group does not share only one common vision or perspective of the conflict.

In class we have recognized the sharp rise in antisemitic acts as well as the increase in acts of anti-Muslim hate. We emphasize the steps we can take individually to call out, correct, and address that sort of hate. Ultimately, it's critical that students understand how the broader historical issues we are studying are connected to them on a personal level. They have the ability to shine light on these issues locally and can be part of the fabric of a stronger community that rejects hate.

It's important to understand the darker parts of our histories if we want to create a brighter future.

Goldman was honored earlier this year by *Voices of Hope*, a nonprofit educational organization created by descendants of Holocaust survivors across Connecticut. *Voices of Hope* raises social consciousness by connecting people to the inhumanity of the Holocaust and other genocides through excellence in teaching.

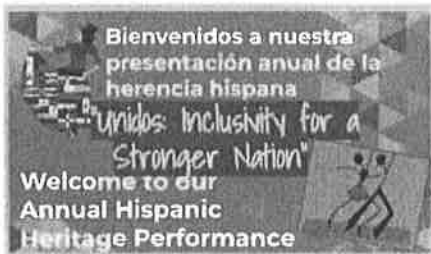
January 27 is
International Holocaust
Remembrance Day



I am nominating myself, Jessica Baldizon, for consideration of the 2024 Katherine Dunham Award. Reading about Miss Dunham's innovative and notable accomplishments, I consider it an honor to be considered for this recognition. The eligibility requirements for this award are ones that I carefully reviewed when composing this nomination and compiling the supporting documentation.

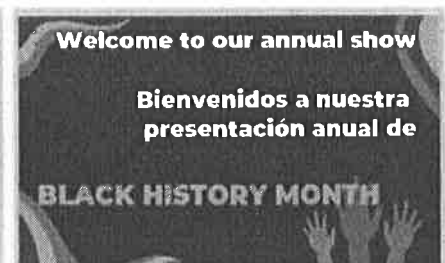
As a teacher of English to speakers of other languages (ESOL) that is also a bilingual (Spanish-English), first generation, English learner and daughter of immigrants from Nicaragua, I have always taken my role with my grade 3-6 students very seriously. Given that my students are multilingual learners who possess rich individual backgrounds and experiences I have sought to promote an understanding and appreciation of multiculturalism within our school environment, my own daily lessons, and beyond the traditional 4 walls of the class as well. Early on in my teaching career I learned that the arts are a wonderful vehicle for cross-cultural learning and, when meaningfully integrated, may yield rich discussions and points of connection. Importantly, I have done this during the regular school day within my ESOL programmatic teaching + school-wide collaborations with colleagues and after the school day with my afterschool programming via HOPE Club & the Young Ladies' Book Club.

During School Day: School-wide Collaborations: As an individual who personally enjoys museums + cultural shows, I have sought opportunities to bring this to my school as well. I have served on the Hispanic Heritage & Black History committees every year and helped create the slideshow (showcasing art around our school, facts, and more) for these performances every year. This year I have also collaborated with two Pre-K classrooms to bring a nonprofit cARTie a "mobile museum" to encourage an art gallery experience for our youngest learners who otherwise would not have an in-school trip experience. In the past I have also been the lead coordinator so that all of the third grade students at my school could enjoy a live theater performance of "The Ugly Duckling" at the Downtown Cabaret. I served as the main liaison with the theater and our teachers and was a chaperone as well.



Left: Opening slide of past Hispanic Heritage School-wide performance. Students had opportunities to read facts about home countries, perform dances and participate in sing-along songs with lyrics projected on screen. I created game-show like questions to support transitions in between acts. While I helped to coordinate, it was a schoolwide collaboration with committee members.

Right: Opening slide of past Black History Month performance. Students read facts about notable people, read poems and performed songs. I selected two of my sixth grade multilingual learners to be the emcees for the event.



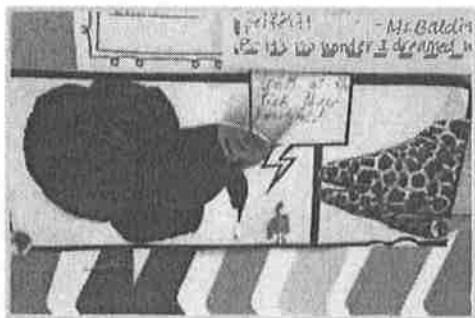
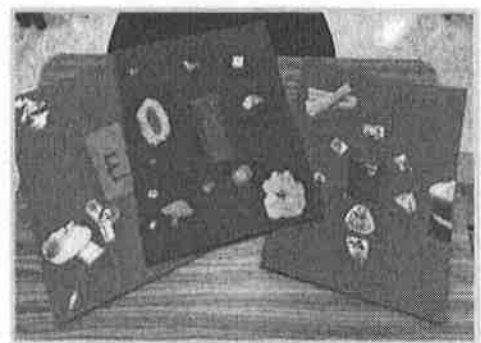
During School Day: ESOL Teaching: I have always sought ways to identify and use multicultural teaching materials. As much as possible I am to attend professional lectures or national conferences (like National Conference for Teachers of English–NCTE) and no matter if I'm virtual or in-person I listen attentively for new ideas and resources that would support my aim of incorporating the arts into literacy + language learning. Despite being in a district that is historically underfunded when it comes to education budgets, I have found ways to bring in materials that are culturally rich by collaborating with other teachers (for example to acquire a drum) or creating DonorsChoose projects so that donors may help fund materials. To date I have successfully had 38 projects funded which equates to \$13,925 in new resources many of which were for rich texts and art materials to use in our ESOL classroom. One way that I especially incorporate multicultural teaching materials is through books I have acquired—both advanced picture books and graphic novels. I have looked to add authors who represent black, indigenous, people of color and share the stories that resonate with my students. For example, I have added texts by/about Sonia Sotomayor and Jean-Michel Basquiat. In reference to these texts specifically, I have brought the arts to “inner-city students” which is an eligibility requirement for this award. Importantly, I recognize that many of my students are recently relocated youth and prior to arriving in our shared space they may have lived in more rural or suburban spaces. For this reason we closely read the images in the picture books and look for connections we can make across time and space. No matter the mini-unit of study, I aim to incorporate an opportunity to enrich their learning through art. For example: draw + paint like Basquiat after learning of his life story, write positive messages in home language and English on stones after learning about Mary Walker (the oldest student who was once enslaved but learned to read as an adult), and create welcoming art after exploring what it's like to be new at a school. I even invited my own Zumba instructor to lead 4th grade students in a special dance experience one afternoon! Be it poetry writing, art creation, or dance I have found time and time again that meaningfully integrating the arts leads to genuine joy learning and supports a well-rounded educational experience for all students.



Left & Below: An example of acquired materials to support art integration in 2018 with my students in the classroom. I always have scissors, glue sticks, coloring materials and magazines readily available to seamlessly integrate art-based activities. I have created DonorsChoose projects to add: oil pastels, watercolor paint sets, sidewalk chalk, perler beads and even origami paper to my teaching resources. These have been used to support in-class lessons, create welcome to our school signage, and support special times like lunch bunch or afterschool programs.



Right: Sample fourth grade student folders showcasing how arts + about me activities reinforce the celebration of our individuality and collective identities too. I have students create collages early in the year (and add to it as the year goes on) with images that tie to who they are (likes, dislikes, wishes, etc). Students give mini-presentations to share about why they selected what they did. Collages are also used to create graffiti walls to support the learning of new vocabulary.

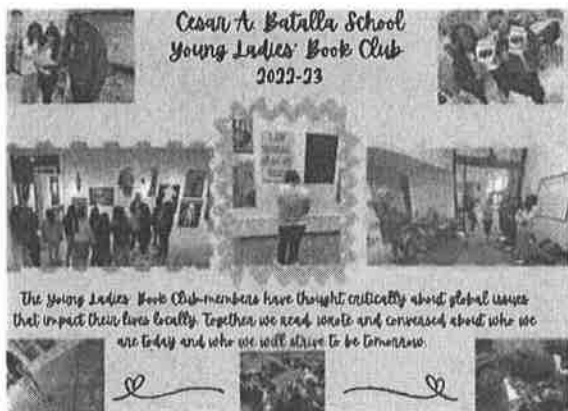


Left: Sample of art integration with in-class writing activities. Students created their own comic strips to accompany their writing.

After School Day: Afterschool Programming: I am a co-founder + co-coordinator of a group called HOPE Club (Harboring Optimism and Perseverance Through Education) which brought together multilingual learners from Bassick High School (grades 9-12) and Cesar A. Batalla School (grades 4-8). United with a common goal to develop English language skills, my partner and I designed lessons and activities to foster community among students who varied in age, home country, home language, even schools. When the pandemic happened we acquired special funding to provide each student with art materials so they may build upon skills they had voiced wanting to improve (sketching, painting, baking, ceramics, etc.). Over time, this group evolved into a Young Ladies' Book Club that I host afterschool for young ladies in grades 5-8. Both of these afterschool programs have benefited from field trips to local museums at Fairfield University, cultural shows at local theaters, and countless other opportunities to engage in the arts.

Below: Photos demonstrating art kits distributed to HOPE Club students, group photos at local museums, young ladies create art during book club, and a young lady standing in the middle of positive chalk messages written during book club.





*****Any photos showing students' faces was done so because guardians had previously signed photo release forms for programming*****

As I hope is evident in the written narrative and accompanying photos, I truly feel that the arts are integral to meaningful learning and it has an ability to transcend language. While at museum visits I have heard students make meaning from complex art in ways that are remarkable. While explaining their own art I have heard students forge connections with these experiences and I believe that without these extra moments the depth would not come as naturally. I thank you for reviewing these nomination materials and am more than happy to answer any questions should they arise.

-Jessica Baldizon 😊

Supporting document with full narrative & accompanying photos (link below):

https://docs.google.com/document/d/1QfJ93GYH4NYZx9OTE1ULnRChLc9f3NL_bK1c38qbIEY/edit?usp=sharing

I am nominating myself, Jessica Baldizon, for consideration of the 2024 Katherine Dunham Award. Reading about Miss Dunham's innovative and notable accomplishments, I consider it an honor to be considered for this recognition. The eligibility requirements for this award are ones that I carefully reviewed when composing this nomination and compiling the supporting documentation.

As a teacher of English to speakers of other languages (ESOL) that is also a bilingual (Spanish-English), first generation, English learner and daughter of immigrants from Nicaragua, I have always taken my role with my grade 3-6 students very seriously. Given that my students are multilingual learners who possess rich individual backgrounds and experiences I have sought to promote an understanding and appreciation of multiculturalism within our school environment, my own daily lessons, and beyond the traditional 4 walls of the class as well. Early on in my teaching career I learned that the arts are a wonderful vehicle for cross-cultural learning and, when meaningfully integrated, may yield rich discussions and points of connection. Importantly, I have done this during the regular school day within my ESOL programmatic teaching + school-wide collaborations with colleagues and after the school day with my afterschool programming via HOPE Club & the Young Ladies' Book Club.

As I hope is evident in the written narrative and accompanying photos shared via link or graciously shared by Eric Ahrens, I truly feel that the arts are integral to meaningful learning and it has an ability to transcend language. While at museum visits I have heard students make meaning from complex art in ways that are remarkable. While explaining their own art I have heard students forge connections with these experiences and I believe that without these extra moments the depth would not come as naturally. I thank you for reviewing these nomination materials and am more than happy to answer any questions should they arise.

Jessica Baldizon 😊

Nomination of Jeanne-Marie McAnanly from Greenwich High School 2024
CEA Humanitarian Award for Leadership in
Recent Immigrant Educational and Community Relationships

Immigrants who arrive at Greenwich High School face many educational and social challenges, the first of which is mastering the language. Students arrive from many continents including Europe, South America, and Asia. Some students bring with them a strong educational background and other students have had interrupted educations which might have ended after 5th or 6th grade. The beauty of Greenwich High School is that all these students share the common goals of our English for Speakers of Other Languages program (ESOL). The sheltered program offers newcomers English courses at four levels, as well as content instruction by certified math and science teachers who value working with immigrants. Jeanne-Marie has dedicated her professional life (24 years at GHS and 10 years in NYC) to teaching immigrants both language and life skills (as outlined in the [GHS Vision of the Graduate](#)) so that they will excel on whatever path they choose in the future.

Midway through a teacher's career, the thought of leaving the classroom and joining the ranks of administrators sometimes occurs. That was not the pathway that Jeanne-Marie chose. Jeanne-Marie knew that her creative talents and passion for languages would best be expressed by working directly with students in the classroom and by developing materials. She regularly attends the International TESOL Conference for inspiration and training in new technology. She graciously shares all of her teaching materials with colleagues.

In addition to her classroom duties, Jeanne-Marie assists with family intake interviews and placement testing. She speaks Spanish and French and is incredibly valuable as a liaison between our ESOL program and families. She sets a tone of high academic achievement and high social expectations for all students and works hard to ensure that all succeed.

These extensive examples show the extraordinary talent and commitment Jeanne-Marie McAnanly has made to all English Language Learners. I see her as an expert teacher. While students are learning to read, write, speak, and listen in English, they are also learning what it means to be part of a community that values education, goal-setting, integrity, and generosity. Jeanne-Marie plans her lessons with attention to the needs of our students and helps them understand their place in our world. She always accentuates what talent each student brings to the classroom and finds ways to make learning meaningful, memorable, and fun.

For the past few years, Jeanne-Marie was able to support our math and biology teachers at Greenwich High School. This meant that she became a co-teacher in these classes and spent hours planning with her peers outside of class. Daniel Bloom, the ESL Biology teacher wrote:

Jeanne-Marie was an amazing partner during our co-taught ESL Biology class. She brought a wealth of strategies and ideas to my lesson, provided suggestions about how to support their English learning, and even created review activities for the end of our units. She always went above and beyond. She even planned a field trip for the class to the Maritime Aquarium. Overall, she taught me a lot about how to work with ELLs, provided insights about our student population, and was an excellent collaborator. I'm sorry I didn't get to work with her again this year.

Jeanne-Marie's heart is invested in each student. I have learned to be a better teacher because of her countless suggestions and effortless modeling. She regularly invites all her peers into her classroom to celebrate the success of her students.

Another component that cannot be shown here is how Jeanne-Marie conferences with each student. This happens authentically in the Learning Center, a place where students come to get their work done. She approaches each student with care. Because of Jeanne-Marie's thoughtful suggestion, we recently purchased portable stools so we could sit next to students at their desk and be at the same level as they are. Jeanne-Marie recognizes that our students deal with challenging issues outside the classroom. This small gesture shows her sensitivity, but speaks louder to who she is as a person. Humble, honest, and loving are words that come to mind immediately which is why I proudly nominate her for the CEA Humanitarian Award for Leadership in Recent Immigrant Educational and Community Relationships.

TABLE OF CONTENTS

The following selection of sample documents represent the highlights of her career as a materials designer and demonstrate the commitment that Jeanne-Marie has to her students' academic and social growth and development.

I. Academic Materials using a variety of technology platforms and differentiation to meet the needs of all students

- A. ESL 2: From the novel *In the Year of the Boar and Jackie Robinson* by Bette Bao Lord
- B. ESL 3: From the novel *Of Mice and Men*
- C. ESL 1: English Listen/Speak (a companion course to ESL Reading/Writing)

II. Academic materials created to support the content-area math and biology teachers

III. Materials created across all four ESL levels to inspire college and career choices

IV. Student Publications and Presentations

V. Activities to support the social/emotional development and well-being of ELLs.

I. Academic Materials using a variety of technology platforms and differentiation to meet the needs of all students

Jeanne-Marie is a product of the National Writing Project which grounds her educational philosophy. She believes that authentic language materials should be used as much as possible. When those materials are inaccessible to language learners, Jeanne-Marie adapts them for her students by providing scaffolded support in background knowledge, vocabulary, and writing. She has also received training by AVID, UBD, SIOP, Voicethread, and Lexia.

A. ESL 2: From the novel *In the Year of the Boar and Jackie Robinson* by Bette Bao Lord

Audio provided with text so students can listen and read together

January audio (pages 16-19) Bandit's New Name (Screencastify)

Vocabulary support is provided with definitions, pictures, and background cultural knowledge.
COMPREHENSION: January (pages 14-19) New Year and Punishment

Text is provided in the left column and vocabulary support in the right column.
Copy of January Text- pages 13-19 New Year and Punishment

Scanning text and finding citations for vocabulary practice.
"January" p. 16-19 Bandit chooses a new name

Making an outline to write a summary with analysis and a supporting citation
Writing Packet Paragraphs with Citations- KEY

Test on January *In the Year of the Boar and Jackie Robinson* (IYBJR)
Test - January IYBJR 2019.doc

Modified/Differentiated Test on January IYBJR
January Test Summary (modified)

Modified/Differentiated Reading (8 pages of text modified to 1 page)
"March" modified text pages 41-49

B. ESL 3: From the novel *Of Mice and Men*

An example of making authentic literature accessible to ESL readers
Text: *Of Mice & Men* - Chapter 2: double-column vocabulary

C. ESL 1 English Listen/Speak (a companion course to ESL Reading/Writing)

Students always welcome more opportunities to practice pronunciation than class time allows for. The ESOL Department adopted VoiceThread as a platform to practice listening and speaking and Jeanne-Marie became a Certified VoiceThread Educator.

This voice thread asks students to listen and sing.
Copy of Circus Song There is/there are 2023 (VT)
If the VoiceThread link doesn't open without an account...
Circus Song There is/There are (VT)

Another platform frequently used is Nearpod.
Restaurant Dialogue: Would you like / Would you like to (Nearpod)

In addition to technology, students are asked to write and perform skits in class.
At the Supermarket Dialogue Template and Rubric - Test

II. Academic materials created to support the content-area math and biology teachers

Jeanne-Marie worked as the ESL push-in co-teacher in content-area ESL Math and ESL Biology for two years. During that experience, she demonstrated how content-area teachers could integrate ESL strategies into their curricula.

ESL 1 Math: Used the VoiceThread platform to introduce an oral listening and speaking component.

[Verbal Expressions Addition and Subtraction \(VT\)](#)

If you can't access this link, please see the original document.

[Verbal Expression Addition and Subtraction 2021 \(VT\) 2021](#)

ESL Biology:

Provided language support to the biology content. Differentiated exams for level 1 and 2 students.

[13. Introduction to Bar Graphs](#)

[9. Bio Word Search Activity Grammar](#)

[15. Experimental Design Vocabulary](#)

III. Materials created across all four ESL levels to inspire college and career choices

The ultimate goal of a teacher is to know that her students are well-prepared for the future. To that end, Jeanne-Marie has worked extensively to add college and career lessons throughout all four years of the ESOL curriculum.

[College Lesson ESL I](#)

[Cost of Living, value of GHS education, lifetime career earnings chart](#)

View document since the video is not supported in Google docs:

[Job Interview-present perfect.docx](#)

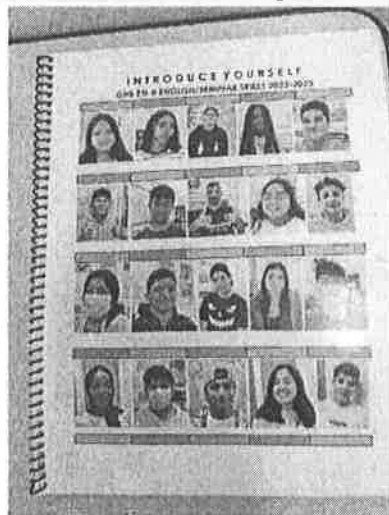
[College interview questions: 3 people](#)

[College Essays Publication ESL 4 2020](#)

IV. Student Publications and Presentations

Jeanne-Marie knows that students write to learn and that writing must be shared with an audience. To that end, she creates multiple opportunities for students to publish and display their work so that others can interact with it.

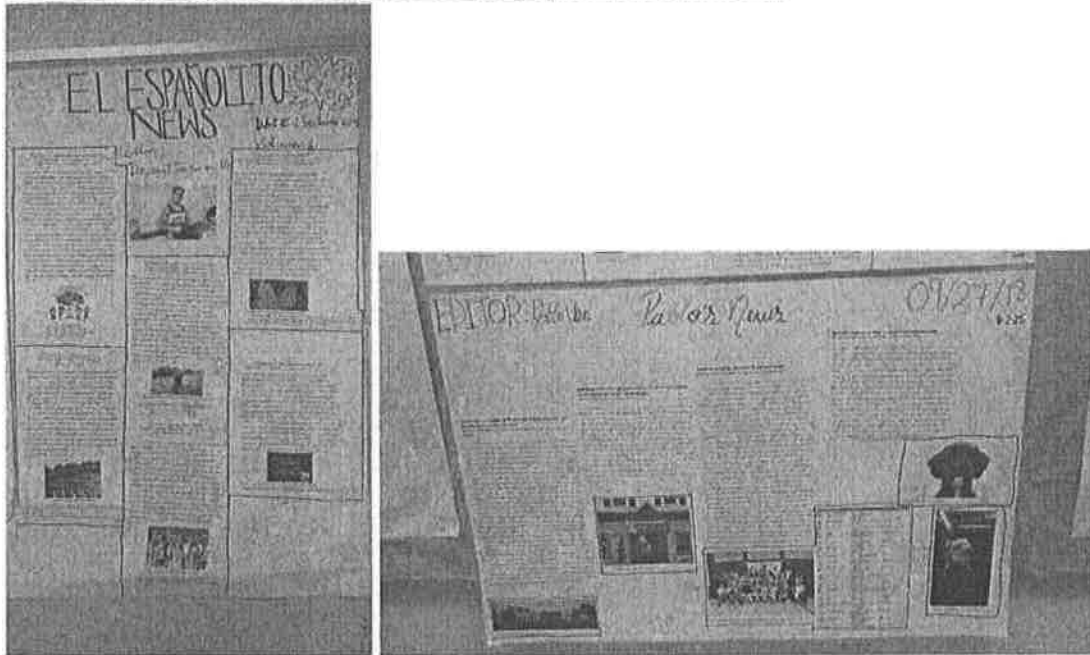
1.  [Introduce Yourself GHS ESL II English Publication - final](#)



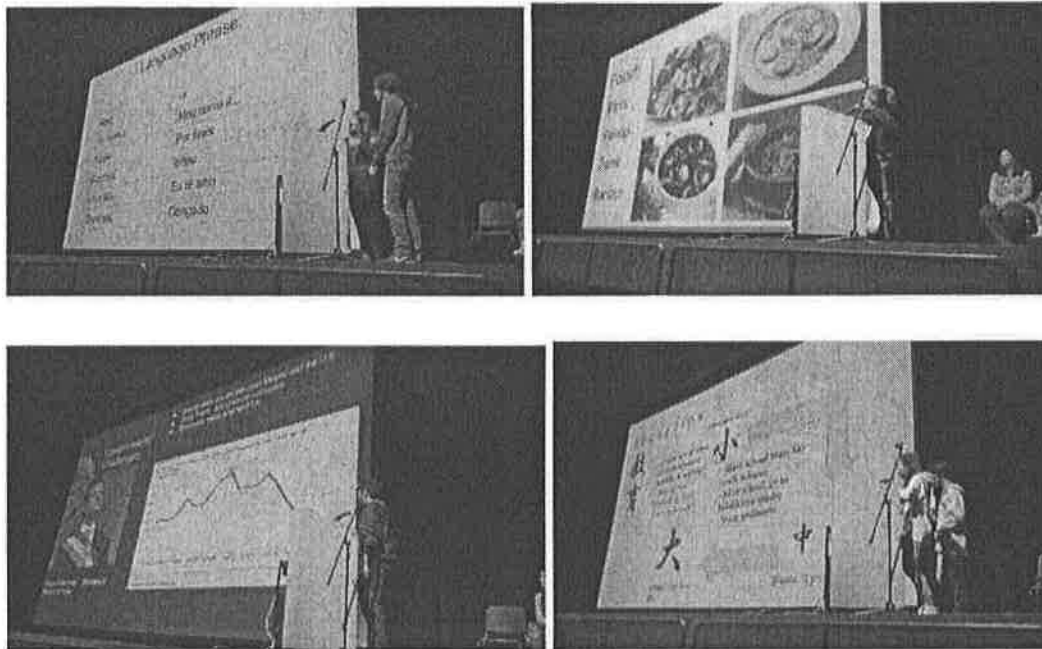
2. Stories from Around the World Publication: Over 20 years ago, Jeanne-Marie paired with an elementary school colleague to have her high school ESL 3 students visit the elementary students to read their stories from around the world. The tradition has been a beloved event ever since.



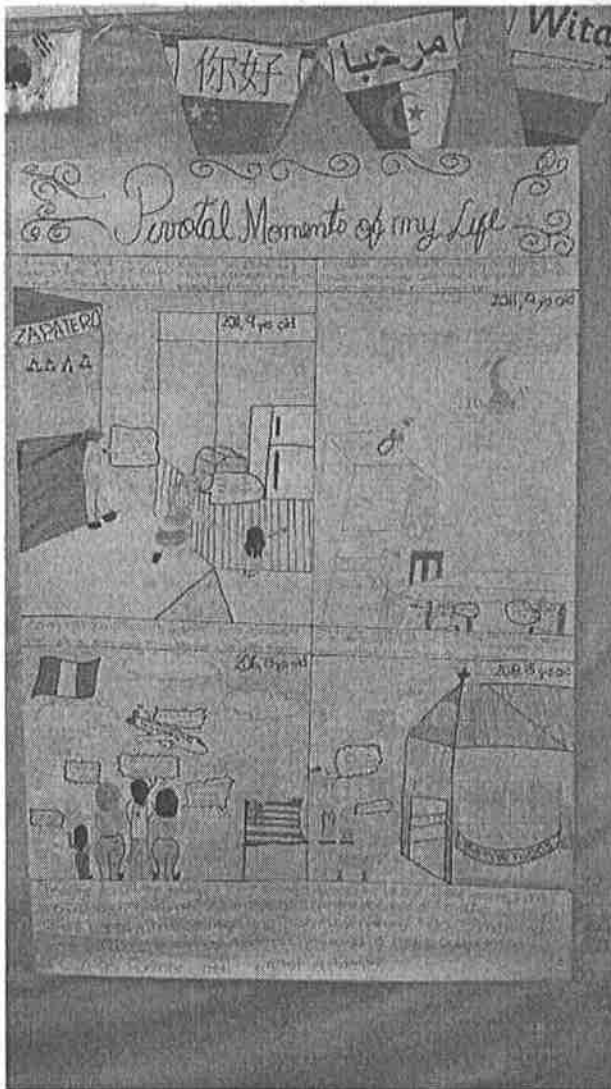
3. ESL 4 Introduce Yourself - Newspaper Assignment



4. **Diversity Week at GHS:** Each year students in ESL 3 9th grade/Global Studies research and present their country to a school-wide audience. After shaky knees and sweaty palms, students gain confidence and exclaim, "That was the best thing I've ever done!"



5. **Graphic novels:** After studying graphic novels and reading *Persepolis* in ESL 3, students present the most important moments of their lives in the form of a graphic novel.



6. ESL 4 Murder Mysteries: After studying the literature of Edgar Allan Poe, ESL 4 students write original murder mysteries or macabre stories.



V. Activities to support the social/emotional development and well-being of ELLs.

1. Introduce Yourself - ESL 1 and ESL 2



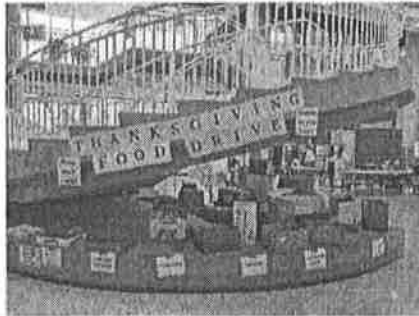
2. ESL 2 Introduce Yourself - Interview a partner and prepare his/her star



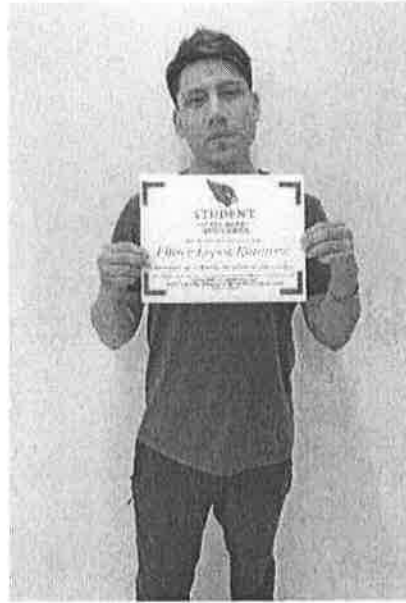
3. Halloween stories: ESL2 students try to scare the ESL 1 students. Jeanne-Marie is always dressed in costume for the day.



4. Annual Thanksgiving Food Drive



5. Student Recognition Awards and Student of the Month



6. Conn TESOL 2018 Scholarship Winner nominated by Jeanne-Marie



7. Class Trips: Jeanne-Marie has been instrumental in the organization and planning of class trips through many years. She recognizes how important it is for students to experience the world outside of the classroom walls. Here are just a few examples:

Norwalk Maritime Aquarium 2023 (9th grade biology + ESL Biology)



“West Side Story” movie



“Meeting” the Secretary of Education



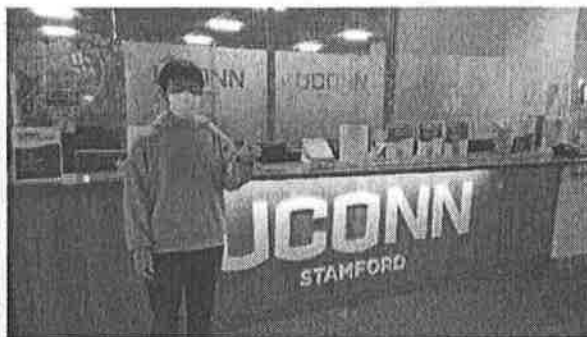
Trip to the Broadway Dinner Theatre



Class Trip to the CT State Capitol and Historical Society with a visit from State Representative Camillo



Annual ESL College Trip



Bi-annual trip to the Greenwich Public Library to get library cards



Reflection - Greenwich Library Trip 2022

Annual Names Day- from the Anti-Defamation League

Support materials for classroom follow-up

I-Messages

Names Day Class Responses ESL 3 2023

Annual ESL International Potluck Dinner: Good food, good families, good fun



Movie Mondays Club -after school activity to build social connections and cultural knowledge

Movie Monday - summary spreadsheet

National Treasure worksheet

ESL Homework Club -two times per week after school

Goal-Setting: Students are asked to set personal goals during each quarter, record their progress and feel the thrill of accomplishing a task they set out to do.

GOAL SETTING 2021-What is your goal?

Goal-setting Master Student List 2023 and records and rubric

Emilia's Reflections (quarterly)on Goal-setting Template 2023"

Personal Connections: Jeanne-Marie shares her experiences of the world with her students. She was invited by the Japanese Chamber of Commerce to visit Japan and learned about the Japanese educational system and culture. She met and heard the story of an atomic bomb survivor.



Sadako and the Thousand Paper Cranes
Test Chapters 1 & 2 Sadako
Test Chapters 1& 2 (Modified) Sadako

Japanese Natural Disaster Relief



