



## Arizona Equitable Services Carryover Process

*In general, to ensure that equitable services are provided in a timely manner, an LEA must obligate the funds allocated for equitable services under all applicable programs in the year for which they are appropriated. [ESSA Sections 1117(a)(4)(B) and 8501(a)(4)(B)]. If an LEA is providing equitable services as required and meeting the obligation of funds requirement in ESEA section 1117(a)(4)(B), it generally should not have any, and certainly not significant, carryover. There may be circumstances, however, in which an LEA is unable to obligate all funds within this timeframe in a responsible manner. Under these circumstances, the funds may remain available for the provision of equitable services under the respective program(s) during the subsequent school year. In determining how such carryover funds will be used, the LEA must consult with appropriate private school officials. [ESEA sections 1117(b) and 8501(c)]. The Equitable Services Ombudsman must review any carryover requests. The following is the process for LEAs and private schools to follow.*

### Timeline and Procedures

*\*Please be mindful that carryover requests cannot be submitted until Completion Report is submitted by LEA and approved by Grants Management. Carryover request amounts and supporting budget documentation should align with LEA Completion Report.*

1. **LEAs should reach out** to and hold consultation with private schools they worked with in the previous fiscal year to discuss if there are any proportionate share funds remaining.
2. If there are funds remaining, the private school can request that all or some of the funds be carried over.
3. The LEA and private school must complete the carryover request form **together**.
4. The LEA should then email the completed request form and supporting budget documentation to the Ombudsman at [PrivateSchoolsOmbud@azed.gov](mailto:PrivateSchoolsOmbud@azed.gov).
  - For LEAs whose financial expenditures end for the fiscal year on June 30<sup>th</sup>, the due date is **September 30<sup>th</sup>**.
  - For LEAs whose financial expenditures end for the fiscal year on September 30<sup>th</sup>, the due date is **December 30<sup>th</sup>**.
5. Upon receipt of the completed form and documentation, the Ombudsman will have 45 business days to make a decision on the carryover request. However, if additional clarification is needed from the LEA, the 45 days may be extended.
6. **An email indicating if carryover was approved or not, as well as the approved amounts and detailed instructions as to how to incorporate the approved carryover into the current year's grant. The LEA will need to share the decision with the private school and consult about the use of the approved funds, which cannot be carried over again.**