

Arizona Equitable Services Carryover Process

OBLIGATION OF FUNDS

Funds allocated to an LEA for educational services and other benefits to eligible private school

children, their teachers, and their families must be obligated in the fiscal year for which the funds are

received by the LEA. (ESEA section 1117(a)(4)(B)).

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 PNP and LEAs to follow.

Timeline and Procedures

For LEAs whose financial expenditures end for the fiscal year on June 30th:

1. The private school has until August 1st to formally request carryover from LEA. This request must be sent in writing to PrivateSchoolsOmbud@azed.gov with a completed PNP Carryover request form attached.
2. Once the PNP carryover request form is received by SEA, the SEA will then have 48 hours to send the LEA carryover form to the LEA who the carryover has been requested.
3. The LEA has 5 business days to complete and return the form with supporting documentation of expenditures and budget summaries.
4. Upon receipt of the completed LEA form and documentation, the SEA will have 45 business days to make a decision on the carryover request. However, if additional clarification is needed by SEA from either the PNP or LEA, the 45 days may be extended.

For LEAs whose financial expenditures end for the fiscal year on September 30th:

1. The private school has until November 1st to formally request carryover from LEA. This request must be sent in writing to PrivateSchoolsOmbud@azed.gov with a completed PNP Carryover request form attached.

2. Once the PNP carryover request form is received by SEA, the SEA will then have 48 hours to send the LEA carryover form to the LEA who the carryover has been requested.
3. The LEA has 5 business days to complete and return the form with supporting documentation of expenditures and budget summaries.
4. Upon receipt of the completed LEA form and documentation, the SEA will have 45 business days to make a decision on the carryover request. However, if additional clarification is needed by SEA from either the PNP or LEA, the 45 days may be extended.