

# Title II, Part A “Carryover” Instructions

“Carryover” is the term often used to refer to funds that have not been spent as originally obligated by the district. Title IIA funds are made available on July 1 of the fiscal year and remain available for obligation for a period of 27 months. This 27-month period includes an initial 15-month period of availability and an automatic 12-month extension permitted under the “Tydings Amendment”.

## ESEA Grant Timeline



### Transferred Funds

A district may choose to transfer funds from Title IIA into another title program during the first 15 months of allocation. However, these funds remain in EGMS under Title IIA and must be claimed from the Title IIA grant. If a district does not claim all the transferred funds by the end of Year 1, a carryover application will automatically be generated for any remaining funds.

### Completing the Application

In mid-November districts have access to the carryover application on the secure district site. Districts may carry over 100% of the remaining funds. These funds must be **obligated by September 30<sup>th</sup> and claimed by November 15<sup>th</sup>**.

Carryover requests must include:

#### **1. An explanation for why funds were not spent.**

There are many reasons why a district may find themselves with carryover funds available. For example, fewer educators may have participated in the training than was projected.

#### **2. A separate line item for each allowable expense.**

Though these funds were originally received as part of the previous year’s grant, **each activity must be associated with a prioritized need identified in the current year’s IIA Needs Assessment**. Consequently, the current year’s application must be in process before carryover requests can be reviewed.

#### **3. A description of the allowable activities that the district would like to undertake.**

Carryover activities are subject to the same allowability requirements as those in the original application. **In the case of transferred funds, carryover applications must reflect activities aligned with the program into which funds were transferred.**

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Create a separate line item for each proposed strategy. All strategies included in the Budget Narrative should include:

1. The **related need** from the Needs Assessment (**WHY** did you choose this strategy?);
2. A brief **description** of the strategy/activity (**WHAT** are the knowledge and skills participants will obtain?);
3. The type and number of **staff involved** (**WHO** is participating?); and
4. The **measure(s)** used to determine whether the strategy is generating the results you expect. (**HOW** will you measure impact\*?)

## REMINDERS:

- All strategies/activities must meet the USED definition of professional learning as "...high quality, sustained, intensive" (e.g.; what is the frequency; how is the strategy part of a sustained, job-embedded plan for professional learning)
- The % of FTE should be included when requesting to fund any staff position as well as the number of staff supported by the position.
- \*Impact is not restricted to student achievement, and can include impact on educator practice. Evidence of impact could include surveys, educator evaluation data, attendance, behavior, graduation rate, course participation, etc.

## **Substitutes**

Under Title II, Part A, an LEA may use funds for a substitute teacher while a teacher is receiving professional development provided that the professional development meets the ESEA definition in section 8101(42) and the LEA can justify that paying for a substitute and the professional development itself (a) is consistent with the purpose of Title II, Part A – (i.e., to increase student achievement, to improve the quality and effectiveness of educators, to increase the number of educators who are effective in improving student academic achievement, and to provide low-income and minority students greater access to effective educators), and (b) addresses the learning needs of all students.

LEAs also must ensure that the hiring of these substitutes supplements, and does not supplant the use of local and State funds they would otherwise be spending for such substitutes.

## **Private Schools and Equitable Services**

Funds allocated for eligible non-public students must be obligated in the fiscal year for which the funds are received (July 1 – September 30 of the following year). Any funds not encumbered by the private school by September 30 will be added to the district’s carryover funds.

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**NOTE:** Due to the COVID-19 pandemic the Oregon Department of Education received a waiver from the USED that allows private schools to carryover the equitable share. **This extension is for 2019-20 funds only, and does not apply to 2020-21 funds.**

## Revising Approved Carryover Applications

Once a carryover application has been approved, it cannot be withdrawn from the system and resubmitted electronically. If your district needs to revise its **approved** carryover application, please email Sarah Martin at [sarah.martin@state.or.us](mailto:sarah.martin@state.or.us).

Communications regarding Title IIA are provided through [this listserv](#). Please sign up if you wish to receive Title IIA notifications.