



**Obligation of Funds, Evaluation, & Carryover  
Title I-A, Title II-A, Title IV-A  
Funding Year 2026 (Carryover funds into FY27)**

\*Local Education Agency \_\_\_\_\_ \*CTDS \_\_\_\_\_

\*Private Nonprofit School (PNP) \_\_\_\_\_

**Instructions:** Please **initial each page** as verification that both LEA and PNP agree and participated. Information may be transferred into a sharable document, form, or other tool as long as all sections/ questions are included and answered.

**\*LEA: FY26 Obligation of Funds (SY 2025-2026):** Please provide the date that funds were made available to the private school to begin services. This is the date services began and/or when the first purchase order was generated (not necessarily the substantial approval or director approval date).

Title I-A	Title II-A	Title IV-A
Date		

Services should have begun when services began for the LEA (salaries in grant). If not, please describe any factors that prevented the start of services for each applicable fund.

\*LEA: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\*PNP: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**\*LEA:** How and when do PNPs get notified when the school's equitable share increases or decreases?

\_\_\_\_\_  
\_\_\_\_\_

**\*Title I-A Evaluation:** For each service area, please provide agreed upon data that was used to evaluate the overall effectiveness.

PNP did not participate in Title I-A. Skip to the Carryover section.

Service Area		Service Area		Service Area	
Data Source/Assessment					
Effective Use of Federal Funds					
Yes	No	Yes	No	Yes	No

It is the LEA's responsibility to develop a plan, implement the plan, and adjust the plan if not effective. If the Title I-A program was not successful, please describe what modifications will be made to implement a successful Title I-A program with an outcome of increasing student achievement.

**\*LEA:** \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**\*PNP:** \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**Carryover**

PNP has no grant with remaining funds. Skip to the Signature section.

**Consideration:** Entitlement funds are meant to be used in the year appropriated. Reserving large sums eliminates opportunities for other public and private school participants with needs. Equitable service carryover should be rare and minimal. The approved carryover funds must be used by the end of this funding period along with the current year allocation.

**Rationale:** Provide the reason that funds were not used in the year appropriated, as intended. Please justify each grant that has remaining funds. Include a plan so this does not occur again.

**\*LEA:** \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**\*PNP:** \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**\*LEA & PNP:**

Program	Final FY26 Equitable Share	Remaining FY26 Equitable Share	Amount to Support FY27 Needs (to be used by the end of this funding cycle; may be less than the balance remaining)	PNP: Indicate if carryover is being accepted or waived for each applicable fund.	
				Yes	Waive
Title I-A, 3c	\$	\$	\$		
Title I-A, 3d	\$	\$	\$		
Title I-A, 3e	\$	\$	\$		
Title II-A	\$	\$	\$		
Title IV-A	\$	\$	\$		

**\*PNP:** I understand that carryover is added as additional funds and **must be expended along with the original allocation during this funded period.** It is our responsibility to work with the LEA to ensure funds, including carryover, are fully expended during this funding period. This includes timely responses to LEA requests, notifying the LEA of any conflict causing a disruption or lapse in service, any change in eligibility, and ongoing communication about all agreed upon programs. **Please note, carryover is not immediately available. The LEA must close out their grant and have approval from ADE before funds are moved into the next funding period.**

\_\_\_\_\_ Initials

**\*LEA:** I understand that carryover is added as additional funds and **must be expended along with the original allocation during this funded period.** It is our responsibility to work with the nonprofit private school to ensure funds, including carryover, are fully expended during this funding period. This includes timely responses to private school requests, notifying the private school of any conflict causing a disruption or lapse in service, budget reconciliation, grant revisions, and ongoing communication about all agreed upon programs. The LEA will notify the private school as soon as carryover funds are available for obligation.

\_\_\_\_\_ Initials

**Contact/Signatures**

**\*Private School Official:** \_\_\_\_\_

Name/Title

\_\_\_\_\_ Phone

\_\_\_\_\_ Email

\_\_\_\_\_ Signature

\_\_\_\_\_ Date

\*LEA Official: \_\_\_\_\_  
 Name/Title

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Phone \_\_\_\_\_ Email \_\_\_\_\_

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Signature \_\_\_\_\_ Date \_\_\_\_\_

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**LEA Next Steps**

- Upload all "*Obligation of Funds, Evaluation, & Carryover*" forms in FY27 LEA Document Library as permanent record.
- Carryover requests are NOT required to be sent to the ombudsman but may if requested by the LEA or PNP.
- Upload **all** private school's completed documents in the LEA Document Library for FY26 Equitable Service Monitoring no later than February 5<sup>th</sup>, 2027 (earlier is acceptable).