

## Measure G1 Carry Over Procedures

Middle schools can rollover all unexpended Measure G1 budget allocations from one fiscal year to the next fiscal year, for a period not to exceed three consecutive fiscal years. If funds are to be carried over from one year to the next, sites must complete a "Carryover Justification" form. If a site's total potential carryover is \$5,000 or less, the site may complete a Carryover Justification SHORT form. If a site's potential carryover is more than \$5,000, the site will need to complete a Carryover Justification LONG form.

Both forms will identify why the funds were not expended (barriers to progress) and identify a clear use of the funds in the next fiscal year that is linked to Measure G1 outcomes and addresses the root causes or builds on the strategies that the school is hoping to leverage for change. Either completed Carryover Justification form will be presented to the Measure G1 Commission at the following commission meeting, where the Measure G1 Commission will vote on whether or not to recommend the request for approval by the Board of Education.

Disbursement of carryover funds will occur in the fall of the target year, once the previous school years full Measure G1 revenue-to-allocation budget has been balanced, and potential carryover funds have been verified.

If a site chooses not to submit a Carryover Justification form, the unexpended funds will automatically be added to the Measure G1 Contingency Fund. Likewise, any unexpended funds at the end of the 3-Year Education Improvement Plan cycle will be added into the Measure G1 "Contingency Fund".

### Procedures:

By mid-October (TBD) sites (charter and District) will receive their carry-over balance from the Middle School Network office.

### Carryover under \$5000:

- 1) Complete the Measure G1 Carryover Justification Short Form
- 2) Submit to Middle School network office by the deadline (Early November – TBD based on when carryover balances are available from OUSD Accounting.
- 3) Measure G1 Commission reviews proposal and site available to address questions.
- 4) Measure G1 commission will submit recommended plans to BOE for approval.
- 5) Once BOE approved, sites will be able to move forward with their plans.

### Carryover over \$5,000:

- 1) Start engaging community and staff engagement regarding plans for carryover funds. Meeting documentation (minutes, agenda, sign-in sheets must be submitted with the application).
- 2) Complete the Measure G1 Carryover Justification Long Form submit with required engagement documentation.
- 3) Submit to Middle School network office by the deadline (Early November – TBD based on when carryover balances are available from OUSD Accounting.
- 4) Measure G1 Commission reviews proposal and a brief presentation is made by site.
- 5) Measure G1 commission will submit recommended plans to BOE for approval.
- 6) Once BOE approved, sites will be able to move forward with their plans.