



FLORIDA DEPARTMENT OF
EDUCATION
CAREER AND ADULT EDUCATION

**Quality Assurance and Compliance
Onsite Monitoring Review
for
Perkins Career and Technical Education
and
Adult Education**

Martin County School District

November 5 – 6, 2025

Final Report

TABLE OF CONTENTS

I.	Introduction	1
II.	Authority	1
III.	QAC Core Monitoring Guide.....	1
IV.	Provider Selection	2
V.	Martin County School District.....	2
VI.	Monitoring Activities	3
VII.	Observation	3
VIII.	Results	9
IX.	Summary	10
	Appendix A.....	11

Florida Department of Education
Division of Career and Adult Education
Martin County School District
Perkins Career and Technical Education
and
Adult Education

Quality Assurance and Compliance Monitoring Report

I. INTRODUCTION

The Division of Career and Adult Education (Division) within the Florida Department of Education (Department) has several key responsibilities, including leadership, resource allocation, technical assistance, monitoring and evaluation. These duties require the Division to oversee the performance and regulatory compliance of federal and state funding recipients. The Quality Assurance and Compliance (QAC) office plays a critical role in this process by designing, developing, implementing and evaluating a comprehensive quality assurance system, which includes monitoring. This system aims to ensure financial accountability, program quality and regulatory compliance. As stewards of federal and state funds, it is the Division's duty to regularly monitor the use of workforce education funds and regulatory compliance of providers on a regular basis.

II. AUTHORITY

The Department receives federal funding from the U.S. Department of Education for Career and Technical Education under the Carl D. Perkins Strengthening Career and Technical Education (CTE) for the 21st Century Act and for Adult Education (AE) under the Workforce Innovation and Opportunity Act of 2014. The Department awards sub-grants to eligible providers to administer local programs. The Department must monitor providers to ensure compliance with federal requirements, including Florida's approved state plans for CTE and Adult Education/Family Literacy. Each state shall have procedures for reviewing and approving applications for sub-grants and amendments to those applications, for providing technical assistance, for evaluating projects and for performing other administrative responsibilities the state has determined are necessary to ensure compliance with applicable statutes and regulations pursuant to 34 Code of Federal Regulations 76.770, Education Department General Administrative Regulations and the Uniform Grant Guidance for grant awards issued on or after December 26, 2014. The Florida Department of Education, Division of Career and Adult Education, is required to oversee the performance of sub-grantees in the enforcement of all laws and rules (Sections 1001.03(8) and 1008.32, Florida Statutes).

III. QAC CORE MONITORING GUIDE

The Core Monitoring Guide is designed to be utilized by any reviewer who is conducting an onsite or desk monitoring of any program currently administered by the Division. The guide includes a brief overview of each aspect of the monitoring design and the process, as well as objectives that can be used when agencies are monitored or reviewed. The guide can be found on the Division's website at <https://www.fldoe.org/academics/career-adult-edu/compliance/>.

IV. PROVIDER SELECTION

Various sources of data are used throughout the implementation of the quality assurance system. The monitoring component of the system is risk-based. Risk assessment is a process used to evaluate variables associated with the grants and assign a rating for the level of risk to the Department and the Division. A risk matrix identifying certain operational risk factors is completed for each provider. The risk matrix for each program monitored is located in Appendix A. The results of the risk assessment process and consideration of available resources are used to determine one or more appropriate monitoring strategy(ies) to be implemented.

The QAC office may apply any specific monitoring strategy to any federal or state-funded provider at any time. There may be circumstances that may warrant onsite monitoring, desk monitoring review or other strategies regardless of a provider's risk matrix score.

The Martin County School District (MCSD) monitoring strategy was determined to be an onsite monitoring review (OSMR). Notification was sent to Mr. Michael Maine, Superintendent, on August 15, 2025. The designated representative for the agency was Ms. Lana Barros, Coordinator of College and Career Readiness, MCSD.

The Division's representative conducting the OSMR was Program Specialist Michael Swift of the QAC.

V. MARTIN COUNTY SCHOOL DISTRICT

Finance

The provider was awarded the following grants for fiscal years 2022-23 through 2024-25:

FY 2022-23

<u>Grants</u>	<u>Grant Number</u>	<u>Grant Amount</u>	<u>Unexpended</u>
Adult Education AGE	430-1913C-3CG01	\$ 272,414.00	\$ 89,139.39
Perkins Secondary	430-1613B-3CS01	\$ 204,345.00	\$ 47,423.98
Perkins Rural	430-1613R-3CR01	\$ 25,000.00	\$ 24,963.27

FY 2023-24

<u>Grants</u>	<u>Grant Number</u>	<u>Grant Amount</u>	<u>Unexpended</u>
Adult Education AGE	430-1914C-4CG01	\$ 188,719.00	\$ 25,889.65
Perkins Secondary	430-1614S-4CS01	\$ 188,313.00	\$ 38,800.17
Perkins Rural	430-1614R-4CR01	\$ 132,527.00	\$ 14,880.39

FY 2024-25

<u>Grants</u>	<u>Grant Number</u>	<u>Grant Amount</u>	<u>Unexpended</u>
Adult Education AGE	430-1915C-5CG01	\$ 631,853.00	\$ N/A
Perkins Secondary	430-1615S-5CS01	\$ 223,503.00	\$ 10,016.96
Perkins Rural	430-1615R-5CR01	\$ 25,000.00	\$ 6,213.59

Additional information about the provider may be found at the following web address:
<https://www.martinschools.org/>.

VI. MONITORING ACTIVITIES

The monitoring activities included pre- and post-review planning, an entrance and exit meeting, records review and interviews with administrators, if necessary.

Onsite Visits

The monitoring team visited the following sites as part of the OSMR:

- Martin County High School
- Indiantown Middle School (IMS)

Entrance and Exit Conferences

The entrance conference for MCSD was conducted on November 15, 2025. The exit conference was conducted on November 18, 2025. The participants are listed below:

Name	Title	Entrance Conference	Exit Conference
Lana Barros	Coordinator, College and Career Readiness, MCSD	X	X
Melissa Eversdyke	Coordinator, Adult Education, MCSD	X	X
Jessica Warren	CTE Coach, MCSD	X	
Division Monitoring Team			
Michael Swift	Program Specialist, QAC	X	X
Charles Davis	Program Specialist, QAC	X	X
Dantavia Davis	Program Specialist, QAC		X

Interviews

No interviews were required as part of the OSMR, but the monitoring team did have a meeting with MCSD to discuss a finding as a result of their grant budget analysis (GBA).

Records Review

Program, financial, administrative and student records were reviewed. A complete list is provided in section VII, part F. A minimum of 50 student records were checked. In addition, policies and procedures were examined and discussed at various times during the monitoring review.

VII. OBSERVATION

A. **ADMINISTRATION** refers to the management and supervision of programs, the structure of programs and services, grant oversight and other administrative areas.

- Although managed by different individuals, it is a collaborative effort on the part of CTE and AE administrators to work with the district finance office to determine the needs of each program area, and to determine if those needs are allowable and fit within the scope of their federal award(s).
- The AE and CTE Coordinators work in conjunction with the district finance office to track and monitor all awarded budget expenditures and disbursements in the district financial management system. If amendments are required, they are approved via the district finance office prior to submission to the Division.

- The Division grant manager for MCSD reported that grant applications and amendments are routinely submitted on time and typically require little to no additional guidance. If revisions are needed, the AE and CTE coordinators submit those in a prompt manner.
- As part of the required comprehensive local needs assessment (CLNA), MCSD CTE administrators consulted with numerous individuals and entities across their service area. Representatives from stakeholder groups also provided insight into the workforce needs and opportunities for special student populations. The list of stakeholders includes, but is not limited to:
 - CareerSource Research Coast, Economic Development Council, Local Chamber of Commerce members and Business Development Board – Representatives of local workforce boards
 - MCSD CTE Coaches, AE Coordinator, Career Dual Enrollment (DE) Coach, CTE Program Specialists and other district administrators – Local secondary educational agency representatives
 - Indian River State College (IRSC), Keiser University and the Chapman School of Seamanship – Postsecondary representatives
 - MCSD Exceptional Student Education director– Special populations representative
 - Boys and Girls Club of Martin County (BGCMC) and Education Foundation of Martin County – Out-of-school youth, homeless children and youth at-risk representatives
 - Local business owners (private and public)
 - Parents and students
- CTE administrators meet with various program advisory councils throughout the year to discuss local workforce needs, economic growth opportunities and job openings. The aforementioned individuals involved in the CLNA also offer insight on local needs throughout the school year.
- As part of the review, monitoring staff verified that Perkins Rural Innovation funds were utilized for the stated purpose in their federal grant application. This was verified via procurement records and visual inspection of equipment at IMS.
- MCSD conducts ongoing professional learning and training events to ensure all CTE and AE administrative staff are up to date on any changes that come from the federal and/or state-level Department of Education. Department-sponsored training events are also attended. MCSD provided multiple records of district-wide training and learning events. District representatives also attended Division training events such as the Florida Association of Career and Technical Education conference and the Adult and Career Education conference.

B. DATA AND ASSESSMENT refers to all the data and assessment system components, including test administration, test security, data collection, entry, reporting and procedures. The use of data in program decision-making is also explored and commented on.

- MCSD utilizes Focus® as its integrated Management Information System (MIS) and student information system. The MIS meets all Department requirements as defined by the Data Dictionary.
- MCSD has written procedures for the collection, verification, analysis and reporting of student data. Division policies on the submission of student data are also adhered to and followed.
- At the local level MCSD maintains dedicated personnel responsible for student registration, data collection and student data verification through a multi-tier checks and balances system. These individuals/positions include:
 - AE Coordinator – Oversees, reviews validation reports and works with staff to ensure reporting accuracy and resolve validation errors.

- Data Entry Clerks – Verifies and enters student data into Focus®, checks Workforce Development Information System (WDIS) edit reports on a weekly basis and meets monthly with the AE Coordinator.
- Educational Technology Personnel – Conducts pre-loads, validates WDIS updates and data correction.
- MIS and Focus® support staff – Addresses system-level data issues.
- MCSD provided testing and assessment policies and procedures for all administrators who proctor AGE placement tests. Additional procedures are in place for industry certifications and Career and Professional Education Funding reporting. Those policies and procedures included administrative training requirements, test security, test scheduling and administering the assessments.
- For entry to AE programs such as Adult Basic Education (ABE), General Education Development (GED®) Preparation and Adult English Speakers of Other Languages (ESOL), MCSD has procedures to ensure all applicants are pre-tested and post-tested, as required, by the Department with state-approved assessments. Testing outcomes are reported to the Department.
- All test proctors are certified in accordance with the Division and each testing agency. Administrator certificates of completion were provided by MCSD and reviewed as part of the monitoring process.
- MCSD AE programs adhere to mandated attendance policies that require a student to be withdrawn from a course after missing a set number of classes. Samples of student attendance records reflecting automatic class drops were provided by the district.
- MCSD provides students with the following notification(s) regarding the use and dissemination of student data:
 - Notification of social security number collection, usage and release.
 - Student and parental rights provided by the Family Educational Rights and Privacy Act (FERPA).
- CTE and AE administrators attend Division events such as quarterly webinars and Management Information System Advisory Task Force meetings. Other professional learning events are attended when the opportunity is available. Additionally, samples of local training events were submitted at the time of monitoring.
- Samples of CTE and AE student data were reviewed and verified for accuracy as part of the OSMR. All student records were provided by MCSD. Records reviewed included:
 - Secondary Diploma or Recognized Equivalent
 - ESOL Completers
 - GED subtest results
 - Industry Certifications

C. **CURRICULUM AND INSTRUCTION** refers to those elements that contribute to student learning and skill acquisition.

- MCSD offers secondary CTE programs on all high school campuses within their service area, in addition to multiple middle schools. Additionally, middle school programs are intended to align with CTE courses offered at each school’s feeder high school. AE programs such as ABE, GED® Preparation and ESOL are housed at multiple sites within their service region.
- In their most recent CLNA and according to recent labor market alignment, MCSD discovered the need for multiple new programs to develop. Those programs included:
 - Transportation Technology
 - Marketing, Management and Entrepreneurial Principals
- No programs were phased out or up for removal according to the CLNA.

- MCSD has a memorandum of understanding (MOU) with CareerSource Research Coast to provide workforce training, employment assistance and other services for those interested in workforce programs and/or literacy services. The two work closely to enhance alignment and market responsiveness of workforce, education and economic development systems through targeted integration to provide the local workforce with talented job candidates.
- MCSD has multiple articulation agreements in place that allow high school CTE students to dual enroll at postsecondary institutions while still in high school. This allows students to earn postsecondary credits and certifications in addition to their high school diploma. Agreements are currently in place with:
 - Indian River State College
 - Embry Riddle Aeronautical University
- In Partnership with BGCRC, eight students from each district high school are selected to participate in a College and Career Readiness Program. The BGCRC provides additional resources such as training and support, whereas the student participants are then empowered to plan, organize and run peer-oriented campaigns in support of postsecondary CTE success. Students selected for the program will then take this knowledge back to their school to promote and serve as advocates for postsecondary CTE education.
- MCSD offers students multiple opportunities to participate in additional learning activities outside of the traditional classroom environment. A sample of those opportunities include:
 - Culinary students routinely cook and prepare meals for school staff, participate in competitions and provide food services away from campus.
 - Students can participate in the Extended Day Work Based Program that allows them to work for their school while learning important job soft skills. Students can also participate in internships and on the job training away his/her school site.
 - Students participating in the Automobile Technology program work on instructor cars to gain additional hands-on, real world experience working on a multitude of different cars.
 - Career and Technical Student Organizations allow students to put their classroom skills to use in a variety of ways. Students participate in local, state and national competitions, and are encouraged to run for various leadership positions within each organization.
 - MCSD has a “Ride Along” articulation agreement with Martin County Fire Rescue, which allows students in the Emergency Medical Technician (EMT) program the opportunity to work alongside county EMTs and use their facilities for training and instructional purposes.
- In compliance with Section 504 of the Rehabilitation Act of 1973 no student who self-declares a disability is denied appropriate and reasonable accommodation as determined by the student’s needs.
- MCSD offers ample professional learning and training to AE and CTE administrators and staff. Instructors also participate in ongoing training provided by the Division, as well as annual professional learning through the district. Program-specific training and/or certifications are also completed as required.

D. TECHNOLOGY AND EQUIPMENT refers to a review of the technology and equipment used by students and instructors in the classroom; addresses access, availability, innovation, use and condition.

- All inventory criteria set forth by federal, state and local guidelines are included within the district’s fixed asset management system. The district Property Inventory Manual governs the acquisition, usage, safety/storage, inventory reconciliation and inventory disposal of all district equipment. In addition to these policies and procedures, MCSD has internal controls

and procedures to govern loss prevention, transfer of property and the disposition of capital equipment.

- Every program site has a designated administrator who serves as the custodian responsible for all equipment at his or her site. This individual works in conjunction with the district Director of Purchasing, who is responsible for all property and equipment district wide.
- A complete inventory of tangible property is conducted annually, with the results compiled by each site custodian, then submitted to the Director of Purchasing and subsequently approved by the School Board.
- Policies and procedures are in place for equipment that is either lost or believed to be stolen. Lost items must be reported immediately upon discovery, and if evidence shows that an item is believed to be stolen, the property custodian must request a formal police incident report. MCSD reported no instances of lost, damaged or stolen granted-funded capital assets over the past 36 months.
- Monitoring staff conducted inventory reviews at two MCSD campuses and all inventory was accounted for and in its correct location. QAC staff verified inventory at the federal \$5,000 threshold, as well as spot checked \$1,000 items for internal controls compliance. No issues were uncovered.

E. EQUAL ACCESS refers to compliance with federal non-discrimination laws' requirements relating to recruitment, enrollment, participation and completion of programs.

- MCSD included the necessary policies required by the General Education Provisions Act (GEPA) and other federal laws, which ensure equal access and participation in programs regardless of sex, race, national origin, color, disability or age.

F. RECORDS REVIEW refers to reviewing the records and documents that evidence compliance with federal and state rules and regulations. In addition, a sampling of financial and programmatic records is reviewed.

Documents reviewed are:

- Notification of social security number collection, usage and release
- Student authorization for access to educational records
- FERPA notification
- Testing policies and procedures manual
- Time and effort reports
- Student data
- AE student attendance records reflecting class drops
- Fiscal and operational policies and procedures
- Comprehensive Adult Student Assessment System proctor certifications
- Multiple MOUs
- Dual enrollment articulation agreement
- Advisory committee meeting records
- Travel records
- Procurement records
- GEPA statement
- CLNA documentation
- Professional learning samples

G. **FINANCIAL** refers to aspects of the federal fiscal requirements that providers must meet when expending federal funds, including financial management, procurement, inventory management and allowable costs.

- Skyward® is used as MCSD’s financial management system.
- MCSD has policies and procedures that provide uniform and systematic internal controls to promote efficient fiscal responsibility and accountability in the expenditure of federal funds. The following components of the procedures manual were reviewed as part of the monitoring process:
 - Budget Preparation
 - Cash Management
 - Cost Principals
 - Fiscal Planning
 - Internal Controls
 - Procurement
 - Travel
- MCSD does use grant-funded P-cards for expending grant funds. All purchases made with P-cards must receive prior approval and be used solely for the operation of a grant-funded program or when encumbering expenses necessary for tasks such as travel and conferences. When a P-card is used, it is the responsibility of the authorized card holder to submit proper documentation to the P-Card Reconciler within three days of the transaction’s post date. Sample P-card transactions and reconciliations were provided by MCSD.
- MCSD has specific guidelines to ensure that grant funds will be used to supplement programs and funding and not to supplant or replace existing program funding.
- All supplies, equipment and services charged to a grant-funded source shall be purchased using sound judgement and obtained at the lowest cost possible. All purchases must be in accordance with and as permitted by applicable federal and state laws, Department rules, MCSD policies and procedures which promote transparency and accountability in the expenditure of grant funds. MCSD provided Internal Control procedures that ensure cost-effective and ensure maximum value to the district.
- Except as authorized by law or rule, competitive solicitations shall be issued for the procurement of commodities and contractual services exceeding the amount of \$50,000. Procurements may not be divided to avoid this monetary threshold. Competitive solicitations include the following methods of procurement:
 - Invitation to Bid
 - Request for Proposal
 - Invitation to Negotiate
- The district finance and procurement office is responsible for any contractual agreements that use federal grant dollars. The exception is when a contract exceeds \$50,000, in which the School Board shall approve and execute the contract.
- QAC monitoring staff conducted a fiscal review of the providers’ approved grant budget narrative and final expenditure reports. Upon review, multiple errors were uncovered that led to a finding. See the “RESULTS” section for more detail.
- MCSD provided additional fiscal records such as:
 - Time and effort
 - Procurement
 - Travel
 - P-card transactions and reconciliations

All records were in accordance with applicable local, state and federal law.

H. COLLABORATION refers to the collaborative agreements, partnerships or memoranda of understanding (MOU) that are in place to benefit an agency's programs and students.

- MCSD has numerous collaborations, partnerships and MOUs throughout their service region. These partnerships aid in the expansion and implementation of the core objectives of MCSD. The list of partners includes, but is not limited to:
 - CareerSource Research Coast
 - Indian River State College
 - Martin County Fire and Rescue
 - Cleveland Clinic Martin Health
 - Keiser University
 - Chapman School of Seamanship
 - Embry Riddle Aeronautical University
 - Space Florida

VIII. RESULTS

MCSD was found to be out of compliance in the following area:

Finding Number	1
Area	Finance
Finding Summary	Upon review of the grant budget analysis, it was discovered that multiple object codes across multiple program years were used but were not pre-approved via the original budget narrative or amendment. Additionally, object codes were over-spent.
Finding Detail	Grant: 430-1614S-4CS01; 430-1613B-3CS01; and 430-1915R-5CR01
Citation	Violation of the Project Application and Amendment Procedures for Federal and State Programs (Green Book), Section B "Project Amendments. Along with <u>2 CFR 200.308, (b) (c)</u> , revisions of the budget & program plan and <u>2 CFR 200.407</u> , not seeking prior approval before expending funds.
Recommended/Anticipated Corrective Action	Coordinator of College and Career Readiness provided a memo of attestation stating that MCSD accepts the finding and what steps they are taking to ensure compliance in the future.
Anticipated completion date:	Complete
Name and Title responsible for CAP	Lana Barros, Coordinator, College and Career Readiness, MCSD

IX. SUMMARY

After completing the monitoring review and receiving any additional information requested, a preliminary report is sent to the provider for their review. The Division monitoring team lead may consider comments at their discretion. Once the final report is approved, it will be sent to the agency head and a copy will be sent to the provider's designated contact person. The final report will also be posted on the Department's website, which can be found at: <http://fldoe.org/academics/career-adult-edu/compliance>.

Once all outstanding corrective action plan items have been completed (when applicable), the Division will issue a closure letter to the agency head and designated contact person. This letter will signify the end of the monitoring process and that no further action is required.

The monitoring team would like to extend their appreciation to all participants in the Martin County School District monitoring review, on behalf of the Division. A special thanks is offered to Ms. Lana Barros and Ms. Melissa Eversdyke for their participation and leadership during this process.

APPENDIX A

Martin County School District
Career and Technical Education
Risk Matrix

Risk Scores Matrix for Districts Receiving Career and Technical Education (CTE) Carl D. Perkins Grants					
Agency Name: Martin County School District					
Program Type: CTE					
Monitoring Year: 2025-2026					
Metric	Scaling	Point Value	Points Assigned	Weight	Total Metric Points
Number of Years Since Last Monitored	7 or More Years	7	3	<u>X 10</u>	30
	5-6	5			
	3-4	3			
	0-2	1			
Total Budget for all Perkins Grants Combined	Upper Quartile	7	5	<u>X8</u>	40
	Upper Middle	5			
	Lower Middle	3			
	Lower Quartile	1			
Number of Perkins Grants	4 or More	7	5	<u>X 8</u>	40
	3	5			
	2	3			
	1	1			
Change in Management Information Systems (MIS) from Previous Fiscal Year	Yes	7	0	<u>X 6</u>	0
	No	0			
Agency CTE Program Director Change from Previous Fiscal Year	Yes	7	0	<u>X 6</u>	0
	No	0			
Unexpended Funds from all Perkins Grants Combined	Upper Quartile	7	7	<u>X 4</u>	28
	Upper Middle	5			
	Lower Middle	3			
	Lower Quartile	1			
	0	0			
Number of Findings from the Office of the Auditor General	Upper Quartile	7	3	<u>X 4</u>	12
	Upper Middle	5			
	Lower Middle	3			
	Lower Quartile	1			
	0	0			
AGENCY RISK SCORE:					150

Data sources used for calculations: Prior to July 1, 2024

Martin County School District
Adult Education
Risk Matrix

Risk Scores Matrix for Districts Receiving Adult Education (AE) Grants					
Agency Name: Martin County School District					
Program Type: AE					
Monitoring Year: 2025-2026					
Metric	Scaling	Point Value	Points Assigned	Weight	Total Metric Points
Number of Years Since Last Monitored	7 or More Years	7	3	<u>X10</u>	30
	5-6	5			
	3-4	3			
	0-2	1			
Total Budget for all Adult Education Grants Combined	Upper Quartile	7	3	<u>X 8</u>	24
	Upper Middle	5			
	Lower Middle	3			
	Lower Quartile	1			
Number of Adult Education Grants	4 or More	7	1	<u>X 8</u>	8
	3	5			
	2	3			
	1	1			
Change in Management Information Systems (MIS) from Previous Fiscal Year	Yes	7	0	<u>X 6</u>	0
	No	0			
Agency AE Program Director Change from Previous Fiscal Year	Yes	7	0	<u>X 6</u>	0
	No	0			
Unexpended Funds from all Adult Education Grants Combined	Upper Quartile	7	5	<u>X 4</u>	20
	Upper Middle	5			
	Lower Middle	3			
	Lower Quartile	1			
	0	0			
Number of Findings from the Office of the Auditor General	Upper Quartile	7	3	<u>X 4</u>	12
	Upper Middle	5			
	Lower Middle	3			
	Lower Quartile	1			
	0	0			
Adult Education Program Improvement Plan (AEPiP)	Target Not Met on 3 of 3 Indicators	5	1	<u>X 6</u>	6
	Target Not Met on 2 of 3 Indicators	3			
	Target Not Met on 1 of 3 Indicators	1			
	All targets met	0			
Agency Risk Score					100

Data sources used for calculations: Prior to July 1, 2024



Please address inquiries regarding this report to:

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