



FLORIDA DEPARTMENT OF
EDUCATION
CAREER AND ADULT EDUCATION

Quality Assurance and Compliance

**Onsite Monitoring Review
for
Pathways to Career Opportunities Grant**

The School District of Osceola County

September 8-10, 2025

Final Report

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Florida Department of Education
Division of Career and Adult Education

**The School District of Osceola County
Pathways to Career Opportunities Grant (PCOG)
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

Pursuant to Section 1008.32, Florida Statutes, Rule 6A-20.046, Florida Administrative Code, the PCOG Request for Proposal and the Uniform Grant Guidance, also referred to as 2 Code of Federal Regulations Part 200, the Department is responsible for monitoring programs run by a sub-grantee or provider of supported activities to ensure adherence to relevant federal and state regulations.

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: <http://fldoe.org/academics/career-adult-edu/compliance>.

IV. PROVIDER SELECTION

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 School District of Osceola County (SDOC) monitoring strategy was determined to be an onsite monitoring review (OSMR). Notification was sent to Dr. Mark Shanoff, Superintendent, on August 8, 2025. The designated representative for the agency was Mr. Timothy Burdette, Executive Director of Secondary and Postsecondary Education, SDOC.

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

V. THE SCHOOL DISTRICT OF OSCEOLA COUNTY

Finance

The provider was awarded the following grants for the fiscal years 2019-21 through 2023-24:

FY 2019-21

<u>Grants</u>	<u>Grant Number</u>	<u>Grant Amount</u>	<u>Unexpended</u>
Pathways to Career	490-90310-0D001	\$ 105,242.00	Terminated
Opportunities	490-90310-0D002	\$ 106,000.00	Terminated
	490-90310-0D003	\$ 196,000.00	\$ 4,796.82
	490-90310-0D006	\$ 164,691.00	Terminated

FY 2021-23

<u>Grants</u>	<u>Grant Number</u>	<u>Grant Amount</u>	<u>Unexpended</u>
Pathways to Career	490-90310-2D401	\$ 100,000.00	\$ 16,731.31
Opportunities			

FY 2022-23

<u>Grants</u>	<u>Grant Number</u>	<u>Grant Amount</u>	<u>Unexpended</u>
Pathways to Career	490-90310-3S501	\$ 288,319.00	\$ 23,453.48
Opportunities	490-90310-3S502	\$ 91,687.00	\$ 37,323.77

FY 2023-24

<u>Grants</u>	<u>Grant Number</u>	<u>Grant Amount</u>	<u>Unexpended</u>
Pathways to Career	490-90310-4S001	\$ 136,340.00	\$ 62,965.39
Opportunities	490-90310-4S002	\$ 257,670.00	\$ 43,369.91

Additional information about the provider may be found at the following web address:

<https://www.osceolaschools.net/>.

VI. MONITORING ACTIVITIES

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

Onsite Visits

An onsite inventory review took place at the following locations:

- Osceola Technical College (oTECH) – St. Cloud Campus
- oTECH – Kissimmee Campus

Entrance and Exit Conferences

The entrance conference for SDOC was conducted on September 9, 2025. The exit conference was conducted on September 10, 2025. The participants are listed below:

Name	Title	Entrance Conference	Exit Conference
Timothy Burdette	Executive Director, Secondary and Postsecondary Education, SDOC	X	X
Karen Combs	Director, oTECH, SDOC	X	X
Kathy Ruiz	Accountant, oTECH, SDOC	X	X

Robert Dombo	Principal, Adult Learning Center Osceola (ALCO), SDOC	X	X
Margarita Ortiz-Torres	CTE Grants Specialist, SDOC	X	X
Teresa O'Brien	Accountant, SDOC	X	X
Carol Tudor	Administrative Assistant, SDOC	X	X
Joe Trybus	Postsecondary CTE Coordinator, SDOC	X	X
Stephen Darago	CTE Coordinator, SDOC	X	X
Division Monitoring Team			
Michael Swift	Program Specialist, QAC	X	X
Dantavia Davis	Program Specialist, QAC	X	X

Interviews

No interviews were required as part of the OSMR.

Records Review

Program, financial, administrative and student enrollment records were reviewed. A complete list is provided in section VII, part E. 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.

- In addition to their PCOG grants being managed by SDOC administrators, each registered apprentice (RA) program enjoys the support of well-established advisory committees that provide additional resources and input on current and future industry trends.
- SDOC has a relationship with CareerSource Central Florida to provide additional resources such as employment services, labor market information and training opportunities.
- Prior to being awarded state PCOG funds, SDOC had experience managing grants from a wide variety of sources.
- PCOG deliverables were submitted to the Division on time, needing limited technical assistance. All deliverables were paid at or near full value.

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.

- The Division's Office of Research and Evaluation requested that the monitoring staff confirm SDOC's PCOG enrollment numbers submitted to state data reporting systems. Enrollment data was requested for the following occupation(s):
 - Automotive Service
 - Carpenter
 - Certified Welder
 - Construction Laborer
 - Medical Assistant
 - Bus and Truck Deisel Mechanic

- Maintenance Repair Building
- SDOC provided enrollment data and supporting documentation as required by the Department. The PCOG team, in coordination with the Office of Research and Evaluation, reviewed and resolved discrepancies identified in the data. Members of the QAC team did not take additional action beyond documentation and confirmation during the monitoring review.
- All documentation was provided by SDOC as part of the monitoring review.

C. CURRICULUM AND INSTRUCTION refers to elements contributing to student learning and skill acquisition.

- SDOC’s PCOG funding went toward the expansion of its current RA programs and to begin new RA programs. A sample of occupations sponsored under PCOG include:
 - Carpentry
 - Building Maintenance
 - Bus/Diesel Maintenance
 - Medical Assisting
- SDOC provides its own related technical instruction (RTI), while the on-the-job training (OJT) component of the programs is provided by local sponsor employers. Employer partner responsibilities include:
 - Assisting with the development of the apprenticeship occupation,
 - Aiding in the recruitment of candidates,
 - Hiring and paying the wages of the apprentice,
 - Assigning a journey worker to serve as the qualified trainer for the apprentice,
 - Evaluating the apprentice on their on-the-job competencies, and
 - Providing feedback to the sponsor on training needs, talent retention methods and labor costs.
- The apprenticeship training approach is one that is competency-based, that requires the attainment of manual, mechanical or technical skills and knowledge, as specified by an occupation standard, and demonstrated by an appropriate written and hands-on proficiency measurement. All RTI includes established curriculum that is created and maintained by nationally recognized trade organizations and provided at multiple oTECH campuses or district sites, with some web-based learning offered.
- SDOC faculty members receive professional learning training so that every instructor providing RTI meets Department requirements for a CTE instructor. The instructor must be a subject matter expert who is recognized within the industry as having expertise in a specific occupation or hold the licensure or certification required in the given occupation.
- Program hours for students may vary by occupation, with at least a minimum of 2,000 hours being standard across all programs.
- SDOC employer sponsors are required to sign an apprenticeship sponsor agreement and a Standards of Apprenticeship document. These agreements dictate the educational aspects of the program, including OJT and RTI learning criteria. The employer sponsors also serve on committees that meet regularly with SDOC workforce training staff to continually update and refine their programs.

D. TECHNOLOGY AND EQUIPMENT refer 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 Record Manual governs the acquisition, usage, safety/storage, inventory reconciliation and inventory disposal of all district equipment. In addition to these policies and procedures, SDOC has internal controls

and procedures to govern loss prevention, transfer of property and the disposition of capital equipment. Property control records are housed within the TERMS Asset Management Database.

- 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 Property Records Technician (PRT), who is responsible for all property and equipment district wide. Additionally, the PRT coordinates inventory location, assignment and disposal of equipment. They are also responsible for insuring accurate accounting and ledger records for all inventory.
- SDOC utilizes a Property/Equipment Transfer/Location Change form whenever equipment and/or property is moved from its designated location. A Property Borrower Responsibility form is used anytime equipment leaves its designated site for use by a student or teacher. The form includes the individual's name, item requested and duration period for the item to be in their possession.
- A complete inventory of tangible property is conducted annually, with the results compiled by the PRT and submitted to the School Board for approval.
- Policies and procedures are in place for equipment that is either lost or believed to be stolen. Lost items must be reported in the Annual Inventory Report of Lost Property report, then the PRT will update their records in the inventory management system. If evidence shows that an item is believed to be stolen, the Property Custodian must request a formal police incident report. Once the investigation is concluded, the formal report is submitted to the PRT to update internal records reflecting the current disposition of the item. All lost and/or stolen property records are submitted to the Chief Business and Finance Officer for final approval by the School Board. SDOC reported no instances of lost, damaged or stolen granted-funded capital assets over the past 36 months.
- Monitoring staff conducted inventory reviews at two oTECH campuses and all inventory was accounted for and in its correct location. QAC staff verified inventory at the \$5,000 threshold, as well as spot checked \$1,000 items for internal controls compliance. No issues were uncovered.

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

Documents reviewed were:

- Policies and procedures for financial accounting
- Policies and procedures for capital asset management
- Apprenticeship employer agreement form
- Final Project Disbursement Report
- Grant Budget Analysis (GBA)
- Monthly transaction ledger
- PCOG performance outcome forms
- Purchase invoices
- Financial statements
- Apprenticeship and pre-apprentice activity reports
- Quarterly deliverables
- Sponsor letters of support

F. **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.

- TERMS Solutions is used as SDOC's financial management system.
- SDOC 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:
 - Purchasing guidelines and procedures
 - Sole source purchases
 - Budget implementation
 - Cash management
 - Contracts and bids
 - Purchasing cards (P-card)
 - Inventory management
 - Procurement
 - Conflict of interests
 - Ethics
 - Travel
- When applicable, 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. P-card purchases are limited to acquisitions of less than \$1,000.
- 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. Once appropriate documentation is received it is then entered into TERMS and charged to the appropriate district account. Sample P-card transactions and reconciliations were provided by SDOC.
- SDOC 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, SDOC policies and procedures which promote transparency and accountability in the expenditure of grant funds.
- The district Director of Procurement and procurement staff are responsible for any contractual agreements entered that uses grant dollars. These individuals also prepare and review all district bids, requests for proposals, professional service proposals and contract documents in accordance with school board policy, federal law and Florida Statute.
- QAC monitoring staff conducted a fiscal review of the providers' grant budget narrative and final expenditure reports. Upon review, all expenditures matched their approved budget narratives and amendments.

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

- SDOC has numerous collaborations, partnerships and MOUs within the local community. They offer additional educational and job experiences to students within their service area. The list of partners includes, but is not limited to:
 - CareerSource Central Florida
 - Orlando Health
 - Teamsters Local 385

- TruMont
- Wharton Smith
- Energy Air
- Empire Electrical Contractors

VIII. RESULTS

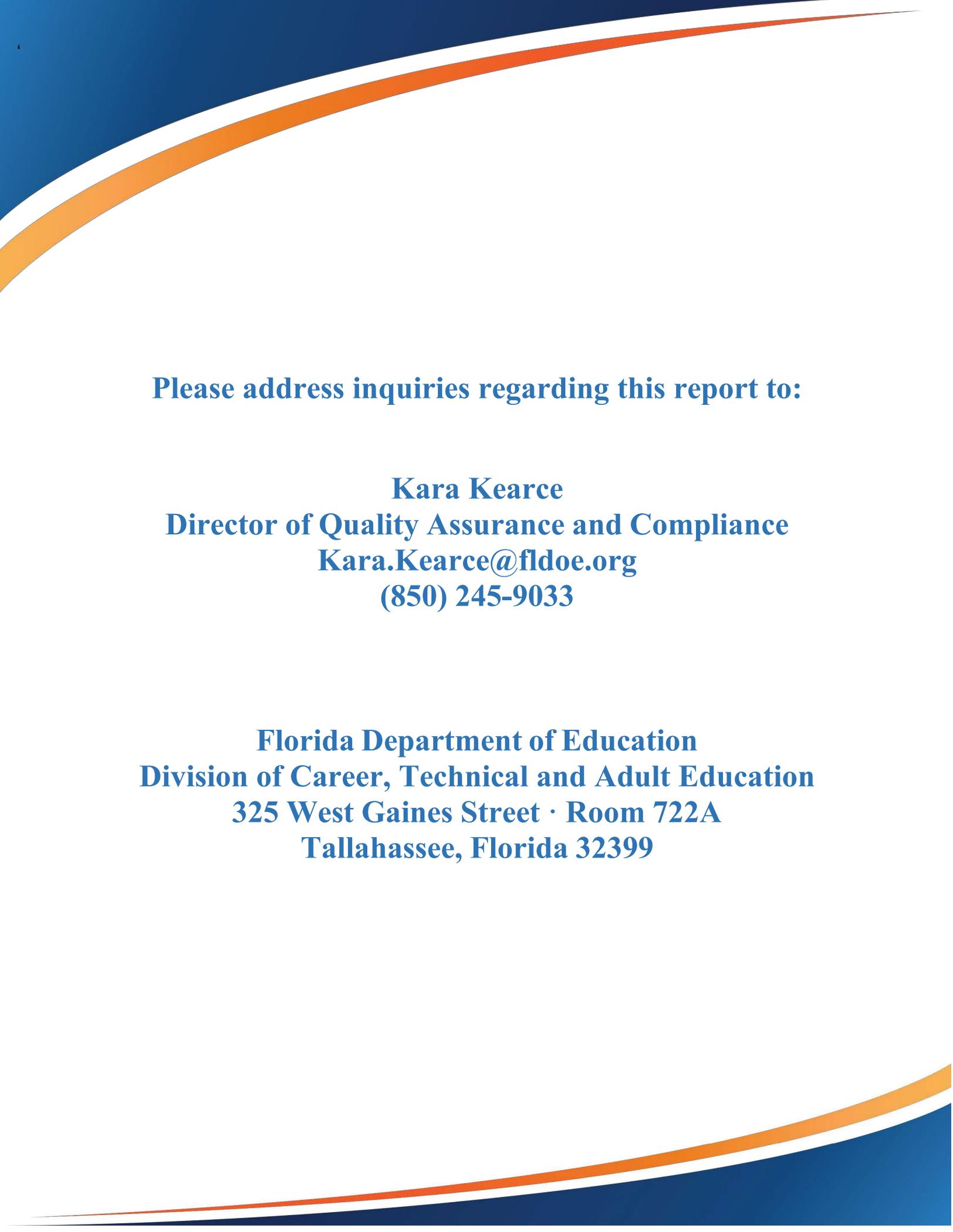
SDOC was not found to be out of compliance.

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 School District of Osceola County monitoring review, on behalf of the Division. A special thanks is offered to Mr. Timothy Burdette for his participation and leadership during this process.



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