



FLORIDA DEPARTMENT OF  
**EDUCATION**  
CAREER AND ADULT EDUCATION

## **Quality Assurance and Compliance**

### **Virtual Desk Monitoring Review for Pathways to Career Opportunities Grant**

**MarineMax, Incorporated**

**May 19-23, 2025**

**Final Report**

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Florida Department of Education  
Division of Career and Adult Education

**MarineMax, Inc.**  
**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.

## **II. AUTHORITY**

Pursuant to Section 1008.32, Florida Statutes, Rule 6A-20.046, Florida Administrative Code, the Pathways to Career Opportunities Grant 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 is located 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 MarineMax, Inc. monitoring strategy was determined to be a virtual desk monitoring review (VDMR). Notification was sent to Mr. William Brett McGill, President & Chief Executive Officer (CEO), on December 12, 2024. The designated representatives for the agency were Mr. Chris Butts and Ms. Mirtha Collin. The Division's representative conducting the VDMR was Program Specialist Charles Davis of the QAC.

## V. MARINEMAX, INC.

### Finance

The provider was awarded the following grant for fiscal year 2023-2024:

#### **FY 2023-24**

<u>Grant</u>	<u>Grant Number</u>	<u>Grant Amount</u>	<u>Unexpended</u>
Pathways to Career Opportunities	85B-90310-4Q001	\$ 382,700.00	\$ 67,784.16

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

<https://www.marinemax.com/>

## 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

- MarineMax

### Entrance and Exit Conferences

An introductory Teams meeting with Mr. Chris Butts and Ms. Mirtha Collin took place on April 30, 2025. An exit conference was held on May 8, 2025.

<b>Name</b>	<b>Title</b>	<b>Entrance Conference</b>	<b>Exit Conference</b>
Chris Butts	Instructor/Training Manager, MarineMax, Inc	X	X
Mirtha Collin	Director, Learning & Development, MarineMax, Inc	X	X
<b>Division Monitoring Team</b>			
Michael Swift	Program Specialist, QAC	X	X
Chuck Davis	Program Specialist, QAC	X	X
Dantavia Davis	Program Specialist, QAC	X	X

### Narrative

Headquartered in Clearwater, Florida, MarineMax offers two comprehensive programs to help develop future marine technicians and advance their knowledge and abilities to the next level. One program is designed for those with no experience in the industry, while the other caters to those encompassing a broader understanding and have worked in the field prior. Additionally, the Marine Service Technician Apprenticeship Program is recognized by the U.S. Department of Veterans Affairs.

## VII. OBSERVATION

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

- MarineMax launched an individual apprentice program in their flagship Clearwater store in 2016. Each year, in conjunction with the Marine Mechanics Institute, they employ 10-15

apprentices that work with them and then graduate from the program. This investment in their future has provided opportunities for existing MarineMax team members who wish to upskill into new roles, as well as opportunities for those new to the marine industry to enter the field and gain hands-on experience while earning their technical degree.

- Marine Service Technician Apprentice Program is a time-based three-year program. The program consists of 6,000 mentor-supervised and directed contact hours delivered over three years and 445 hours of related technical instruction. On-the-job skill attainment must be demonstrated by apprentices and targets are outlined on a quarterly basis in the MarineMax learning management system.
- Mentors are provided with an evaluation rubric for each on-the-job competency and apprentice performance is tracked for each competency in the MarineMax learning management system. New skills/tasks are introduced in the first two quarters of the first year, and the tasks are repeated in subsequent quarters. In later program years, apprentices are evaluated on the same tasks, but asked to demonstrate a higher level of independence in completing each task.

**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.

- The PCOG team requested that the monitoring staff confirm MarineMax's PCOG enrollment numbers submitted to the PCOG office. Enrollment data was requested for the following occupations:
  - Marine Services Technician
- MarineMax provided sufficient enrollment data and documentation as required by the Division.
- All documentation was provided by MarineMax as part of the monitoring review.

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

- No curriculum and instruction were observed during the monitoring review.

**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 with the value of \$1,000 or more met the criteria set forth by federal, state and local guidelines and is included within their fixed asset system.
- An onsite review of equipment with the value of \$5,000 and above was conducted on May 8, 2025.

**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:

- Procedures for finance and procurement
- Policies and procedures for property management

- Inventory records
- Procurement records
- Standards of Apprenticeship manual
- Employee/employer apprenticeship contract
- Instructional and on-the job training manual

**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.

- The Finance Director ensures the efficient management of PCOG grant funds. The following components of their financial policies and procedures manual were reviewed:
  - Budget Implementation
  - Cash Management
  - Methods of Accounting
  - Fiscal Internal Controls
  - Records and Reporting
  - Inventory Management
  - Procurement
  - Conflict of Interests
- Monitoring staff conducted a grant budget analysis of MarineMax's grant. All object codes and dollar amounts pre-approved on their grant award were adhered to.

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

- MarineMax has numerous collaborations and MOUs within the local community. They often offer additional educational and job experiences to students. The list of partners includes, but is not limited to, the following:
  - Career Source Pinellas County

## **VIII. RESULTS**

MarineMax 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, at: <https://www.fldoe.org/academics/career-adult-edu/>.

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.

On behalf of the Division, the monitoring team would like to extend their appreciation to all participants in the MarineMax, Inc VDMR. A special thanks is offered to Mr. Chris Butts and Ms. Mirtha Collin for their participation and leadership during this process.



**Please address inquiries regarding this report to:**

**Kara Kearce**  
**Director of Quality Assurance and Compliance**  
**[Kara.Kearce@fldoe.org](mailto:Kara.Kearce@fldoe.org)**  
**(850) 245-9033**

**Florida Department of Education**  
**Division of Career, Technical and Adult Education**  
**325 West Gaines Street · Room 722A**  
**Tallahassee, Florida 32399**

