



FLORIDA DEPARTMENT OF
EDUCATION
CAREER AND ADULT EDUCATION

Quality Assurance and Compliance

**Onsite Monitoring Review
for
Perkins Career and Technical Education
and
Adult Education**

Bay District Schools

January 12-14, 2026

Final Report

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Florida Department of Education
Division of Career and Adult Education
Bay District Schools
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 section 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 Bay District Schools (BDS) monitoring strategy was determined to be an onsite monitoring review (OSMR). Notification was sent to Mark McQueen, BDS Superintendent, on December 9, 2025. Mr. Jonathan Moore, BDS Director of CTE, served as the designated contact for the OSMR.

The representative of the Division conducting the OSMR was program specialist, Ms. Dantavia Davis of the QAC section.

V. Bay District Schools

The provider was awarded the following grants for FY's 2022-23, 2023-24 and 2024-25

Finance

FY 2022-23

<u>Grants</u>	<u>Grant Number</u>	<u>Grant Amount</u>	<u>Unexpended</u>
Adult Education	030-1913C-3CG01	\$ 257,908.00	\$ 100,562.28
Perkins Secondary	030-1613B-3CS01	\$ 296,009.00	\$ 12,156.95
Perkins Postsecondary	030-1613B-3CP01	\$ 103,164.00	\$ 6,381.34

FY 2023-24

<u>Grants</u>	<u>Grant Number</u>	<u>Grant Amount</u>	<u>Unexpended</u>
Adult Education	030-1914C-4CG01	\$ 282,024.00	\$ 22,182.48
Perkins Secondary	030-1614S-4CS01	\$ 344,692.00	\$ 132,659.23
Perkins Postsecondary	030-1614P-4CP01	\$ 106,181.00	\$ 42,416.00

FY 2024-25

<u>Grants</u>	<u>Grant Number</u>	<u>Grant Amount</u>	<u>Unexpended</u>
Adult Education	030-1915C-5CG01	\$ 361,533.00	\$ *NA
Perkins Secondary	030-1615S-5CS01	\$ 373,289.00	\$ 69,321.85
Perkins Postsecondary	030-1615P-5CP01	\$ 112,649.00	\$ 41,095.02

*The 2024-25 Adult Education grant was extended to 06/30/2026.

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

<https://www.bay.k12.fl.us>.

VI. MONITORING ACTIVITIES

The monitoring activities included pre and post-visit 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:

- Bay County High School
- Rutherford High School
- Haney Technical College (HTC)
- Crawford Mosley High School

Entrance and Exit Telephone Conferences

An entrance conference for BDS was conducted on January 12, 2026. The exit conference was conducted on January 29, 2026. The participants are listed below:

Name	Title	Entrance Conference	Exit Conference
Jonathon Moore	Career Technical Education Supervisor, BDS	X	X
Kimberly Edwards	Director of Federal Programs, BDS		X
Alana Simmons	Director of Secondary Instruction, BDS		X
Jacqueline Webb	Director of Budget and Finance, BDS		X
Angela Reese	Director, HTC		X
Richard Tutunick	Dean, HTC		X
Michelle Simmons	Budget & Business Budget Analyst, BDS		X
Division Monitoring Team			
Dantavia Davis	Program Specialist, QAC	X	X
Michael Swift	Program Specialist, QAC	X	X
Chuck Davis	Program Specialist, QAC		X

Interviews

No interviews were required as part of the OSMR.

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. OBSERVATIONS

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

- The HTC Director assumes administrative responsibility and instructional leadership under the supervision of the BDS Superintendent and in accordance with school board rules and regulations for the planning, management, operation and evaluation of the educational programs at HTC.
- BDS follows an established recruitment and retention plan because most instructors at HTC are granted district certification based on their occupational experience. BDS currently does not coordinate with institutions of higher education for traditional teacher preparation pathways, however they work closely with Gulf Coast State College (GCSC), which offers the Educator Preparation Institute program and partners with Florida State University–Panama City (FSUPC) to support the professional development of CTE instructors.
- The CTE Supervisor of BDS is responsible for ensuring that all proposed goals for CTE programs are successfully achieved by monitoring progress toward the established performance benchmarks each year.
- BDS uses Perkins funds to support, maintain and expand the following CTE programs, with programs of study provided for the Advanced Manufacturing, Construction and Culinary Career Pathways.
- BDS CTE courses are offered in grades 4-12. Students in grades 4-8 complete foundational technology courses to prepare for their high school career pathway of choice. Once students reach the ninth grade, they choose a career pathway and begin coursework within this pathway for the completion of their career sequence by graduation.
- The HTC Director assumes administrative responsibility and instructional leadership under the supervision of the BDS superintendent and in accordance with school board rules and regulations for the planning, management, operation and evaluation of the educational programs at HTC.
- HTC serves students in Bay, Gulf and Franklin Counties and is BDS's only provider of post-secondary CTE, AE and accredited General Educational Development (GED) instruction.
- The HTC administrative team interacts on a regular basis with business and industry partners to identify local training and workforce education needs that should inform the development of new programs and the enhancement of existing training offerings. This includes gathering input from advisory committees, reviewing labor-market demand data, consulting with employers regarding skills gaps and collaborating with community stakeholders to ensure programs remain aligned with current and emerging workforce requirements.
- HTC has workforce-sponsored programs that includes Practical Nursing, Welding, Heating, Ventilation and Air Conditioning and Computer Systems, as well as Aviation Maintenance and Electrician programs when appropriate and supported by demand.

B. DATA AND ASSESSMENT refer 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.

- BDS utilizes Focus School Software ® as its integrated Management Information System and student information system (SIS).
- The CTE department utilizes the services of two data clerks—one based at HTC and the other located within the CTE department at the BDS's main office. All CTE programs follow the same standards and policies required of all Florida schools, including adherence to state-mandated procedures for vetting instructional software and curriculum materials.
- The maintenance of official files and student records is the responsibility of the Student Services staff. All additions to a student's file, including transcripts and any changes to program or class schedules, are processed and documented by the Student Services Department for AE & CTE accountability.

- The BDS Data Specialist is responsible for keeping track of state reporting requirements by regularly viewing the Department's webinars and attending Workforce Education District Data Advisory Council meetings twice a year. The specialist is also responsible for the collection, entry and verification of student data to ensure accuracy and compliance with state and federal reporting standards.
- BDS provides an online application that prospective students complete. The data submitted through the application is automatically transferred into the Student Information System (SIS) for both AE & CTE students.
- Both AE & CTE programs use the BDS's Release of Information form. In accordance with the BDS's procedures for the release of certain records, all requests are forwarded to the District's Director of Communications for review and approval before any information is released.
- Students who enroll at HTC to work toward obtaining their GED are placed in the appropriate instructional program based on their assessment scores. Students who score at Levels one through four are placed in Adult Basic Education (ABE). Students who score at Levels five through six are placed in GED preparation. HTC administers the Comprehensive Adult Student Assessment Systems (CASAS) GOALS Reading assessment and the CASAS GOALS 2 Math assessment. Assessment scores are entered into the SIS and the student's English Language Proficiency Level is recorded accordingly.
- CASAS adheres to UTD principles in both item and test development, following the guiding principle of creating assessments that are accessible to the widest range of students within the target population. This approach is intended to ensure that all learners can meaningfully engage with the test content and that the results and subsequent interpretations are valid, reliable and equitable.

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

- BDS's CTE programs provide a wide range of work-based learning opportunities for students. The program advisory members are engaged and support students through their participation and collaboration within their respective organizations. Each program incorporates classroom-embedded work-based learning experiences that help students develop practical skills, apply academic and technical knowledge and prepare for success in the workforce.
- An AE instructor co-teaches alongside CTE instructors in classrooms, labs and the Success Academy, providing contextualized instruction and learning activities aligned with postsecondary AE and CTE curriculum frameworks.
- BDS offers postsecondary and secondary CTE programs on middle school and high school campuses throughout its service area, as well as through partnerships with nearby universities that include Embry Riddle Aeronautical University Worldwide and FSUPC. AE programs such as ABE, GED preparation and English for Speakers of Other Languages (ESOL) is provided at the HTC location.
- BDS's Unmanned Aircraft System Operations is offered at the secondary level, while Aviation Airframe Mechanics and Aviation Powerplant Mechanics are available as dual enrollment programs.
- BDS's CTE and ESOL programs offer three entry points per school year. Students in Adult General Education (AGE), GED Preparation and ESOL progress through their coursework at their own pace and exit once they have met their individual educational goals. Students

enrolled through Integrated Education and Training (IET) receive integrated, contextualized basic-skills instruction directly within the CTE classroom or lab. They continue to receive this support until they meet the required basic-skills level and earn the associated recognized industry certification.

- Face-to-face instructional services are provided in the AGE/GED/ESOL programs 2.5 hours per day, four days per week. IET instructional services are offered weekly in face-to-face scheduled hourly sessions as well as Open Lab sessions to meet the needs of student schedules.
- There are timed SMART-technology activities to help students build speed and accuracy needed for TABE and GED tests. Students use online tools such as GED Ready, Khan Academy, Essential Ed and Rosetta Stone, along with in-person instruction. Those needing extra support receive targeted one-on-one tutoring and remediation.
- All middle school CTE programs in BDS are aligned with corresponding high school programs in the areas of Information Technology and Arts, A/V Technology and Communication. These secondary pathways are further connected to postsecondary opportunities through alignment with HTC, FSUPC and GCSC.
- The CTE programs are used to reinforce foundational academic skills and instructors use multiple strategies to incorporate reading, language arts and mathematics into each subject.
- BDS offers scholarships to graduating seniors who plan to attend a CTE program at HTC.
- BDS works in conjunction with the HTC career counselor, instructors and administration to expand and develop additional work-based learning opportunities for all students. These opportunities include ride-alongs, job shadowing and hands-on experience in the field at industry or business sites. Secondary students who are dual enrolled are permitted to participate in the same work-based learning activities with parent or guardian consent.
- BDS offers Career and Technical Student Organizations (CTSOs) that provide students with leadership training and opportunities to strengthen career-specific and technical skills aligned to their CTE programs. Examples of CTSOs available to students include Career Education Clubs of Florida, Distributive Education Clubs of America, Future Business Leaders of America, Family, Career and Community Leaders of America, Health Occupations Students of America and the Technology Student Association.

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.

- The BDS's principals at each location are responsible for all equipment and other tangible personal property assigned to or located within that facility. Inventory Management should include:
 - Establish and maintain accurate records of all items of tangible personal property in the school system.
 - Conduct a physical tangible personal property inventory at least once each year in the manner prescribed by law and report any shortages or discrepancies to the School Board.
 - Conduct an additional physical inventory in any school or school facility, immediately upon the change of a principal or other custodial agent and report any shortages or discrepancies to the School Board.
- All inventory of all property at each school or cost center with an acquisition cost of \$2,500 or more is maintained on file within this department.

- All assets (equipment or property) purchased through a District Purchase Order must be reported to the Property Records/Inventory Department.
- All assets purchased from internal accounts with a value of \$2,500 or more must be reported by the school or cost center using the Approval of Service/Materials Donated Internal Accounts form to comply with state guidelines and be tagged for inventory tracking.
- All property transferred between schools or cost centers must be documented and reported on an Inventory Adjustment Sheet.
- Monitoring staff conducted inventory reviews at four of BDS campuses and all inventory was accounted for and in its correct location. QAC staff verified inventory at the district's \$2500 threshold, as well as spot checked \$1,000 items for internal controls compliance. All items were verified and accounted for.

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

- BDS 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:

- Travel records
- Procurement records
- Comprehensive local needs assessment (CNLA) documentation
- Time and effort reports
- Student data
- Policies and procedures
- Notification of Social Security Number collection, usage and release
- Student authorization for access to educational records
- Advisory committee meeting records
- Study Program

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.

- The HTC Student and Financial Services Administrator reviews all internal funds, prepares monthly financial reports and provides required documentation and data for external audits and federal/state compliance audits for BDS.
- Focus is the districtwide system used by BDS for financial management.
- BDS has policies and procedures in place for accounting practices, budgeting and the reporting of financial data.
- Board employees authorized by the superintendent may use Purchasing Cards (PCard) only for school-related purposes in accordance with this policy and administrative guidelines to be

developed by the superintendent. PCards shall not be used to circumvent the general purchasing procedures required by Florida law and Board policy.

- BDS has fiscal policies and procedures that include:
 - Change fund policy
 - PCard policy
 - Budgeting
 - Documentation and Reporting
 - Cash Management
- QAC monitoring staff conducted a fiscal review of the providers' grant budget narrative and final expenditure reports.

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.

- A member of the HTC's administrative team serves on the local workforce development board and ensures that program information is disseminated on a regular basis. BDS currently collaborates with CareerSource Gulfcoast.
- HTC provides multiple career-guidance opportunities through its Student Services office. The school connects with local agencies, participates in job and career fairs, shares information through various media outlets and distributes program materials throughout the district. Students also have access to on-campus career counselors and workforce staff for ongoing support.
- BDS's supervisor of CTE programs is an active member of Alignment Bay County, the Bay County Economic Development Agency and the Bay County Chamber of Commerce. In addition, the CTE Supervisor participates in ongoing meetings with Florida State University–Panama City, Gulf Coast State College and local military partners. Through these collaborations and community partnerships, the CTE program gains valuable insight into local industry needs and workforce demand ensuring that programs remain aligned with regional employment trends and opportunities.

VIII. RESULTS

Based on the monitoring procedures performed, all documentation examined was found to be in compliance with applicable requirements.

IX. SUMMARY

Once the OSMR is completed, including receipt of additional requested information when applicable, a preliminary report is forwarded to the provider for review. Comments are accepted and will be considered at the discretion of the department monitoring team lead. Once the final report is approved, it will be forwarded to the agency head with a copy sent to the provider designated contact person. The final report will be posted on the department's website at the following address:

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

Finally, the division will issue a closure letter to the agency head and the designated contact person. This letter will confirm that all outstanding resolution items have been completed, if applicable, and that no further action is required. This letter will officially conclude your monitoring process.

On behalf of the department, the monitoring team expresses its gratitude to all participants in the onsite monitoring review for Bay District Schools. Special thanks go to Mr. Jonathon Moore for his involvement and leadership throughout this process.

APPENDIX A

Bay District Schools Risk Matrix

Risk Scores Matrix for Districts Receiving Career and Technical Education (CTE) Carl D. Perkins Grants					
Agency Name: Bay District Schools 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	X 10	30
	5-6	5			
	3-4	3			
	0-2	1			
Total Budget for all Perkins Grants Combined	Upper Quartile	7	5	X8	40
	Upper Middle	5			
	Lower Middle	3			
	Lower Quartile	1			
Number of Perkins Grants	4 or More	7	3	X 8	24
	3	5			
	2	3			
	1	1			
Change in Management Information Systems (MIS) from Previous Fiscal Year	Yes	7	0	X 6	0
	No	0			
Agency CTE Program Director Change from Previous Fiscal Year	Yes	7	7	X 6	42
	No	0			
Unexpended Funds from all Perkins Grants Combined	Upper Quartile	7	7	X 4	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	5	X 4	20
	Upper Middle	5			
	Lower Middle	3			
	Lower Quartile	1			
	0	0			
AGENCY RISK SCORE:					184

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

Bay District Schools
Adult Education
Risk Matrix

Risk Scores Matrix for Districts Receiving Adult Education (AE) Grants					
Agency Name: Bay District Schools					
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	X10	30
	5-6	5			
	3-4	3			
	0-2	1			
Total Budget for all Adult Education Grants Combined	Upper Quartile	7	5	X 8	40
	Upper Middle	5			
	Lower Middle	3			
	Lower Quartile	1			
Number of Adult Education Grants	4 or More	7	1	X 8	8
	3	5			
	2	3			
	1	1			
Change in Management Information Systems (MIS) from Previous Fiscal Year	Yes	7	0	X 6	0
	No	0			
Agency AE Program Director Change from Previous Fiscal Year	Yes	7	7	X 6	42
	No	0			
Unexpended Funds from all Adult Education Grants Combined	Upper Quartile	7	5	X 4	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	5	X 4	20
	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	X 6	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					166

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



Please address inquiries regarding this report to:

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