



FLORIDA DEPARTMENT OF
EDUCATION
CAREER AND ADULT EDUCATION

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

Marion County Public Schools

December 8-9, 2025

Final Report

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Florida Department of Education
Division of Career and Adult Education
Marion County Public 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 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 Marion County Public Schools (MCPS) monitoring strategy was determined to be an onsite monitoring review (OSMR). Notification was sent to Dr. Danielle Brewer, Interim Superintendent, on August 8, 2025. The designated representative for the agency was. Ms. Kathy Otte, Director, Career and Technical Education, MCPS. The Division's representative conducting the OSMR was Program Specialist Chuck Davis of the QAC.

V. MARION COUNTY PUBLIC SCHOOLS

Finance

The provider was awarded the following grants for fiscal years (FY) 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	420-1913C-3CG01	\$ 570,509.00	\$ 26,651.78
Adult Education IELCE	420-1933B-3CE01	\$ 130,268.00	\$ 17,023.41
Perkins Secondary	420-1613B-3CS01	\$ 580,520.00	\$ 52,562.03
Perkins Postsecondary	420-1613B-3CP01	\$ 138,810.00	\$ 66,399.23

FY 2023-24

<u>Grants</u>	<u>Grant Number</u>	<u>Grant Amount</u>	<u>Unexpended</u>
Adult Education AGE	420-1914C-4CG01	\$ 609,539.00	\$ 25,306.64
Adult Education IELCE	420-1934B-4CE01	\$ 56,579 .00	\$ 766.70
Perkins Secondary	420-1614S-4CS01	\$ 608,058.00	\$ 52,523.45
Perkins Postsecondary	420-1614P-4CP01	\$ 135,321.00	\$ 6,775.89

FY 2024-25

<u>Grants</u>	<u>Grant Number</u>	<u>Grant Amount</u>	<u>Unexpended</u>
Adult Education - AGE	420-1915C-5CG01	\$ 1,310,598.00	\$ N/A
Adult Education - IELCE	420-1935B-5CE01	\$ 303,623.00	\$ N/A
Perkins Secondary	420-1615S-5CS01	\$ 857,621.00	\$ 55,614.16
Perkins Postsecondary	420-1615P-5CP01	\$ 136,797.00	\$ 10,100.03

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

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

VI. MONITORING ACTIVITIES

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

Onsite Visits

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

- Bellview High School
- Dunnellon High School (Photographic Evidence)
- Forest High School
- Lake Weir High School
- Lake Weir Middle School (Photographic Evidence)
- Marion Technical College (MTC)
- North Marion High School
- West Port High School
- Vanguard High School

Entrance and Exit Conferences

The entrance conference for MCPS was conducted on December 8, 2025. The exit conference was conducted on December 9, 2025. The participants are listed below:

Name	Title	Entrance Conference	Exit Conference
Kathy Otte	Coordinator, Career and Technical Education, MCPS	X	X
Gary Smallridge	Director, Marion Technical College, MCPS	X	
Fallon Driver	Program Specialist, Career and Technical Education, MCPS	X	X
Kim Martsolf	Assistant Principal, Marion Technical College, MCPS	X	
Stephenie Crowder	Director, Finance, MCPS	X	
Robin Summerville	Budget Specialist, MCPS	X	
Division Monitoring Team			
Chuck Davis	Program Specialist, QAC	X	X
Michael Swift	Program Specialist, QAC	X	X

Interviews

No interviews were required as part of the OSMR.

Records Review

The review team examined programmatic, financial, administrative, and student records. Section VII, Part F provides a complete list of reviewed materials. The team reviewed at least 50 student records and examined and discussed policies and procedures throughout 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.

- The secondary, postsecondary and AE grants for MCPS are all co-managed by the directors of CTE and AE and Marion Technical College's (MTC) Vice-Principal, Kim Martsolf.
- MCPS has established policies and procedures required with all approval processes before any grant application is submitted to the Department.
- The AE and CTE directors work in conjunction with their financial office, superintendents, advisory committees and district finance staff. The needs of the programs are discussed within monthly and quarterly meetings. Reports are disseminated monthly that detail what percentage of grant money has been allocated and spent as well as what is left for the year. All needs for each grant are included in the applications, which are reviewed and finally approved by the financial office before being submitted to the department.
- Once the department approves the grant that is submitted, the secondary and postsecondary grants for the MCPS are tracked through Skyward® Management Information System (MIS). In addition, the AE grant for MTC is tracked through the FOCUS® (MIS). This allows the financial office and the CTE and AE directors to work together to track expenditures and ensure the grant is being spent on allowable, allocable and needed for each program assigned.
- The Comprehensive Local Needs Assessment (CLNA) is included within the MCPS grants, which requires consultation within the community and local business leaders. MCPS works directly with the Chamber of Economic Partnership (CEP) as well as stakeholders in the community. The stakeholders include business owners, teachers and various community leaders. The business owners are the chair and vice-chair of the advisory committees which allows the programs to be shaped and developed within the needs of the local businesses. Teachers are included on the advisory committee as support personnel to ensure the information makes it from the meetings to the classroom.
- MCPS offers multiple opportunities for district-wide training and professional learning. AE, CTE and MTC administrative staff participate in annual conferences within their program areas. Staff attend department-sponsored training events and webinars, including those hosted by the Florida Association for Career and Technical Education and the Workforce Educational District Data Advisory Council.
- MCPS has a teacher externships program, which pays teachers to work 32 hours within a local business at a set pay rate. This allows the teacher to be informed on all terminology and new equipment used in the field, and to be a master of the program they teach within the school district.

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 study also explores and discusses how programs use data to inform decision-making.

- Training is provided for staff for the National Reporting System requirements (AE only), data collection procedures, data entry and all other areas of the MIS. Administrative staff also

participate in Department training annually and upon initial hiring. Additionally, MTC has biweekly meetings with the creators of FOCUS®. This guarantees all training for personnel that work within the MIS is fully trained on all updates for the system in detail with the development team for the MIS.

- All of the data elements required of their local MIS were included in the MIS system and verified during the OSMR.
- Registration forms (digital) include the student "release of information" clauses required by the Family Educational Rights and Privacy Act (FERPA). The district and technical college submitted registration screenshots as evidence that shows the included statement.
- The district has internal controls that ensure each individual has access to a specific part of the MIS needed to complete tasks to prevent too many people from being able to view sensitive student data.
- Samples of AE and CTE student data were reviewed and verified for accuracy as part of the OSMR. MCPS and MTC provided all required student records that were requested. In addition, all student records were verified to be correctly entered.
- English speakers of other languages (ESOL) testing is entered by scan to TopsPro as pencil and paper tests are given. A report is then pulled from TopsPro by MTC personnel, which is uploaded into the student's folder in FOCUS® showing what score was attained.
 - Test of Adult Basic Education (TABE) testing is conducted electronically. Once the testing is completed, the data specialist manually enters the student's test score into the Skyward® system. The student data director then double-checks the entered data before submitting information to the department.

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

- CTE students have the opportunity to participate in multiple Career and Technical Student Organizations (CTSO), internships and other work-based learning.
- No reasonable services and accommodations are denied to those students who self-declared a disability. They refer to disabled students as exceptional and have a comprehensive policy and procedure to identify and cater to needs based on disability. Once the student self-identifies during registration, the school keeps forms on file from the students' professional caregiver stating the disability and required attention or accommodations.
- AE instructors are trained to incorporate CTE skills and related content into daily classroom instruction. This is evidenced by the Teacher externships programs, as well as the annual training required.
- MCPS has an enlisted, enrolled or employed (EEE) program. Once the student decides which program they are interested in pursuing during the eighth grade, a checklist and guidance counselor are assigned with quarterly checkups. The checklist is monitored for completion of the current year's objectives as well as what will be required to be completed in future years. This is pivotal to helping the student continue along the readiness path for their post-graduation career. Each checklist differs based on what is chosen by the student.
- The district has a memorandum of understanding (MOU) with CareerSource Citrus, Levy and Marion to provide career services and training for students.
- MCPS has a dual enrollment articulation agreement with MTC that breaks down requirements for students to participate. The Dual Enrollment Articulation Agreement was submitted as evidence for the college.
- TABE is used for student skill level assessment. All TABE test proctors are certified as required by the Department and the testing companies.

- ESOL is provided for students who are learning English for the workplace. All instructors administering tests for ESOL are certified as required by the Department and the testing companies.

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 Education Department General Administrative Regulations and the Uniform Grant Guidance are included within the inventory management system. The inventory management system was verified during the OSMR.
- Photographic evidence of inventory was reviewed as part of the OSMR process for two schools.
- The district has a technology plan that includes policies on new equipment requests, equipment safety/storage and disposal of old inventory.
- There have been no reports of stolen or lost equipment over the previous three fiscal years.
- Monitoring staff conducted inventory reviews at nine MCPS campuses and all inventory was accounted for and in its correct location. QAC staff verified inventory at the MCPS's \$1,000 threshold. 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.

- MCPS 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 was reviewed.

Documents reviewed were:

- 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 & CTE)
- AE student attendance records reflecting class drops
- Fiscal and operational policies and procedures
- Multiple MOUs
- Dual enrollment articulation agreement
- Integrated Education and Training Program of Study
- Advisory committee meeting records
- Travel records
- Procurement records
- GEPA statement
- OAE Manual
- CLNA documentation

- Professional learning calendar

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.

- MCPS has multiple financial policies and procedures to follow that ensure the efficient management of secondary, postsecondary and AE grant funds. The grants are filtered through multiple levels of leadership. The process begins at the requestor level and flows in the following direction. Once a request for the purchase of an item is made and inputted into the MIS, the request is directed to the director of CTE or AE for approval. Once approved, the finance office looks over the validation request as well as if the money is available for the purchase within its designated object code. If money is available and the school is approved for the purchase, the Chief Financial Officer is the final destination for approval.
- MTC uses the Skyward® MIS, while MCPS uses the FOCUS® data system to track all expenditures driven through budgets. Spreadsheets are utilized to track the progression of spending under each category to ensure spending is on track for end-of-year finalization on final expenditure reports (399/499s) to be submitted to the Department.
- Program directors, finance officers and the administrative staff for MTC and MCPS meet monthly to review expenditure reports and to determine a grant's current financial standing. The report is broken down to the object code and school for each grant. The school has utilized spending efficiently through the use of this process
- A grant budget analysis was conducted for MCPS for all grants from 2022-2025. The original grants and final expenditure reports matched. No discrepancies were noted.
- MCPS provided additional fiscal records such as:
 - Time and effort
 - Procurement
 - Travel
 - P-card transactions
 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.

- MCPS has multiple collaborations for articulation and MOUs within the local community. They often offer additional educational and job experiences to students within the district. The current partners are:
 - MOU: CareerSource Citrus, Levy, Marion
 - Articulation: Marion Technical College (MTC)

VIII. RESULTS

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

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 Marion County Public Schools monitoring review, on behalf of the Division. A special thanks is offered to Ms. Kathy Otte for her participation and leadership during this process.

APPENDIX A

Marion County Public Schools
 Career and Technical Education
 Risk Matrix

Risk Scores Matrix for Districts Receiving Career and Technical Education (CTE) Carl D. Perkins Grants					
Agency Name: Marion County Public 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	<u>X 10</u>	30
	5-6	5			
	3-4	3			
	0-2	1			
Total Budget for all Perkins Grants Combined	Upper Quartile	7	7	<u>X8</u>	56
	Upper Middle	5			
	Lower Middle	3			
	Lower Quartile	1			
Number of Perkins Grants	4 or More	7	3	<u>X 8</u>	24
	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	7	<u>X 6</u>	42
	No	0			
Unexpended Funds from all Perkins 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	5	<u>X 4</u>	20
	Upper Middle	5			
	Lower Middle	3			
	Lower Quartile	1			
	0	0			
AGENCY RISK SCORE:					192

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

Marion County Public Schools
Adult Education
Risk Matrix

Risk Scores Matrix for Districts Receiving Adult Education (AE) Grants

Agency Name: **Marion County Public 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	<u>X10</u>	30
	5-6	5			
	3-4	3			
	0-2	1			
Total Budget for all Adult Education Grants Combined	Upper Quartile	7	5	<u>X 8</u>	40
	Upper Middle	5			
	Lower Middle	3			
	Lower Quartile	1			
Number of Adult Education Grants	4 or More	7	3	<u>X 8</u>	24
	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	7	<u>X 6</u>	42
	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	5	<u>X 4</u>	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	<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					182

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



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