FLORIDA DEPARTMENT OF EDUCATION
CAREER AND ADULT EDUCATION

Quality Assurance and Compliance

Virtual Desk Monitoring Review for Perkins Career and Technical Education

Lake Wales Charter

May 11- June 11, 2026

Final Report

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Florida Department of Education
Division of Career and Adult Education

Lake Wales Charter
Perkins Career and Technical 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.

Lake Wales Charter (LWC) monitoring strategy was determined to be a virtual desk monitoring review (VDMR). Notification was sent to Jamine Ansely, Senior Director, LWC, on November 25, 2025. Ms. Rebecca Thomas, Assistant Principal, served as the designated VDMR contact.

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

V. Lake Wales Charter

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

Finance

FY 2022-23

Grants	Grant Number	Grant Amount	Unexpended
Perkins Secondary	53D-1613B-3CS01	$ 74,066.00	$ 18,004.84

FY 2023-24

Grants	Grant Number	Grant Amount	Unexpended
Perkins Secondary	53D-1614S-4CS01	$ 75,066.00	$ 22,802.18

FY 2024-25

Grants	Grant Number	Grant Amount	Unexpended
Perkins Secondary	53D-1615S-5CS01	$ 77,923.00	$ 13,330.90

Additional information about the provider may be found at the following web address: hpps://www.lwcharterschools.com.

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

No onsite visits were necessary as part of the VDMR.

Entrance and Exit Telephone Conferences

An introductory pre-visit for LWC was conducted on April 20, 2026. The exit conference was conducted on June 11, 2026. The participants are listed below.

Name	Title	Entrance Conference	Exit Conference
Rebecca Thomas	Assistant Principal, LWC	X	X
Angela Heyward	Director of Federal Programs, LWC		X
Saran Anuj	Principal, LWC	X	X
Alricky Smith	Superintendent of Business and Finance, LWC	X	X
Division Monitoring Team			
Dantavia Davis	Program Specialist, QAC	X	X
Michael Swift	Program Specialist, QAC	X	

Interviews
No interviews were required as part of the VDMR.

Records Review
Program, financial, administrative and student records were reviewed. A complete list is provided in section VII, part F. A minimum of 25 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 LWC superintendent began piloting Highlander Pathways, a digital book that introduces students to a range of career options. The resource highlights careers across multiple industries and helps students explore paths aligned with their interests, strengths and future goals. It connects classroom learning to real-world applications and supports students in making informed decisions about their academic and career plans.
- The CTE Director utilizes resources from the Statewide Summit on Non-Traditional Student Success to improve enrollment while providing opportunities for incoming and prospective students to explore available programs.
- LWC offers various programs to CTE students that support them in meeting state reading and math requirements. Currently, students enrolled in Literacy Strategies courses have access to the Quindew and Membean foundational reading programs.
- LWC middle school programs are selected based on alignment with local workforce needs, student interests and facility capabilities. In the local area, Agricultural Studies is in demand, aligns with workforce needs, reflects student interest and connects to high school and postsecondary CTE programs.
- LWC middle grades CTE programs help students explore career pathways by aligning academic standards with CTE frameworks and industry certifications, integrating both academic and technical skills. Students participate in these experiences through middle school CTE courses offered as elective options, known as Keystones.

- LWC middle school students have begun using the Xello platform to develop four-year high school plans. The platform enables students to explore employability skills and various career pathways.

B. <u>CURRICULUM AND INSTRUCTION</u> refers to those elements that contribute to learning and skill acquisition.

- LWC CTE programs deliver instruction that integrates academic, technical and employability skills to ensure students are prepared for both postsecondary education and the workforce. This integration is supported through several strategic initiatives, including Integrated Curriculum Design, Project-Based Learning and collaboration between academic and CTE instructors.
- LWC CTE teachers integrate Benchmarks for Excellent Student Thinking, English Language Arts and Mathematics standards into their curriculum to support student learning.
- LWC CTE programs connect students with guest speakers through morning meetings, small groups and virtual Q&A sessions. Field trips and updated technology support career exploration and are available for special populations. Students also engage with employers at an annual Career Fair to learn about in-demand careers.
- Successful completion of the Emergency Medical Responder course provides students with 3 credit hours toward Polk State College's Emergency Medical Services Program. Students can also earn articulated credit by passing PSC exams in Medical Terminology and First Aid & Injuries.
- Students in the Early Childhood Academy earn at least 480 hours of practicum experience toward their industry certification.
- In the Culinary Arts Academy, students participate in Kilted Koffee where they gain experience in menu creation, safety and sanitation, nutrition and kitchen management.
- LWC Agriculture Academy's Veterinary Assisting Program offers work-based learning opportunities through partnerships with local veterinary offices and an on-site Doggie Daycare. Doggie Daycare operates one day per week for staff and their pets, allowing students to work toward completing 250 hours of practicum experience.
- The Nursing Assistant program provides courses aligned with academic standards and health science skills. It develops technical proficiency and includes competency-based learning that builds academic, problem-solving, employability and occupation-specific skills.
- The Digital Design program prepares students for careers in Information Technology and graphic design by building technical skills through hands-on learning in digital art, design and multimedia.

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

- LWC students benefit from access to up-to-date technology, work-based learning opportunities and simulated work environments that enhance career readiness across academies, such as the Health Science Academy, where students utilize a STAT Simulator Manikin to support training in emergency medical skills.

- LWC programs incorporate relevant equipment, technology and materials to support student learning. Students in our CTE programs have access to industry-standard software used in their respective fields, such as:
  - Engineering students use computer-aided design (CAD) software, such as AutoCAD and SolidWorks
  - Graphic design students use the latest versions of Adobe Creative Suite to develop industry-relevant skills.
- LWC culinary arts students operate a school-based café, using professional kitchen equipment to prepare and serve meals to staff, including breakfast and lunch options.

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

- LWC 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.

E. **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 documentation
- Student data
- Policies and procedures
- Student authorization for access to educational records
- Advisory committee meeting records
- Study Program
- Conference agenda
- Records retention guidelines

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 Chief Financial Officer (CFO) serves as the organization's primary fiscal agent, responsible for implementing all financial policies and procedures. Working under the oversight of the Finance Committee, the CFO coordinates key financial activities, including the preparation and presentation of the annual budget, the management of endowment funds and investments and the approval of revenues and expenditures. All financial decisions are carried out in alignment with the Board-approved long-term plans.
- Skyward ® is the districtwide system used by LWC for financial management.
- LWC has policies and procedures in place for accounting practices, budgeting and the reporting of financial data.

- School leadership authorized by the principal may use Purchasing Cards (PCard) only for school-related purposes.
- The principal is responsible for managing personnel and the school's budget, with oversight from the Superintendent and the CFO.
- The School Finance and Payroll secretaries serve as the primary contact at each school location. They are tasked with serving as the gatekeepers of school funds.
- QAC monitoring staff conducted a fiscal review of the providers' grant budget narrative and final expenditure reports.

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

- Most of LWC CTE programs have Industry Advisory Councils made up of local businesses, industry leaders and postsecondary partners. Their input keeps programs aligned with industry standards, while activities such as guest speakers, industry tours and exposure to postsecondary pathways help students build networks and connect learning to real-world applications.
- LWC continues to partner with Polk State College, Warner University and Webber International University through virtual meetings, in-person collaboration and field trips that support student career exploration.
- LWC maintains a Polk County Articulation Agreement with Webber International University and Polk State College, providing students with pathways in engineering through Polk State College and culinary studies through Webber International University.
- LWC receives support from the following local agencies: Florida Best Farms, the Lake Wales Area Chamber of Commerce & Education and the Lake Wales Fire Department.

VIII. RESULTS

Based on the monitoring procedures performed, all documentation examined complied with applicable requirements.

IX. SUMMARY

Once the VDMR is complete, including receipt of additional requested information when applicable, the team forwards a preliminary report 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's designated contact person. The final report will be posted on the Department's website at 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 VDMR monitoring review for Lake Wales Charter. Special thanks go to Ms. Rebecca Thomas for her involvement and leadership throughout this process.

APPENDIX A
Lake Wales Charter
Risk Matrix

Risk Scores Matrix for Districts Receiving Career and Technical Education (CTE) Carl D. Perkins Grants

Agency Name: **Lake Wales Charter**
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	**5**	X 10	**50**
	5-6	5			
	3-4	3			
	0-2	1			
Total Budget for all Perkins Grants Combined	Upper Quartile	7	**1**	X 8	**8**
	Upper Middle	5			
	Lower Middle	3			
	Lower Quartile	1			
Number of Perkins 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 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	**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	**0**	X 4	**0**
	Upper Middle	5			
	Lower Middle	3			
	Lower Quartile	1			
	0	0			
				AGENCY RISK SCORE:	**128**

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

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