

# Program Review and Desk Monitoring Policy

Revision 9.27.11    Effective 9.27.11  
Revised 4.14        Effective 7.1.14  
Revised 8.8.16     Effective 9.7.16

## Introduction

State and federal funding of programs ensures that adult education programs provide educational opportunities meeting the needs of adult education learners. State statute provides for the general control and supervision of adult education programs (53A-15-401). Additionally, the federal Adult Education and Family Literacy Act (AEFLA) requires that recipients of funds be monitored and evaluated by the state as to the quality and improvement in adult education and literacy activities (AEFLA Sec. 223 (C)). The National Reporting System (NRS) was implemented in 2000, resulting in states reporting outcome data on all students participating in adult education programs to the Office of Career, Technical and Adult Education (OCTAE). Outcomes include education level gains, attainment of a secondary equivalency credential, transition to a post-secondary or training program, entering employment or retaining employment.

To ensure that states are assisting students in reaching their desired outcomes, states are required to annually negotiate target benchmarks that programs, in turn, must strive to attain. The rationale behind these requirements (State and AEFLA) is the belief that quality programs produce good outcomes, and that by focusing on these outcomes, programs will have effective instruction, professional development and reliable assessment resulting in strong student growth. As such, good data collection and reporting procedures must be in place.

## Purpose

It is the purpose of the USBE to provide technical assistance to support programs in reaching goals in accordance with both state and federal policy. With the advent of increased accountability requirements also comes the need for programs to demonstrate high, sustainable performance. On-site program reviews occur every three years at a minimum. Both desk monitoring and on-site program reviews ensure that all recipients of state and/or federal funds are providing educational opportunities that affect and increase student outcomes, thus, ensuring that agreed upon grant requirements are met.

Desk monitoring is an opportunity for state staff and program directors/coordinators to review and discuss program performance by using UTopia data, ensuring student progression and program compliance with adult education rules and policies. Desk monitoring utilizes quantitative data to compare program performance over time to state standards.

## Local Program Responsibilities

All programs are required to submit grant applications that specify realistic outcome target goals that are in harmony with the state's federally negotiated targets. As such, it is important that grant proposals include, in specific measurable terms, what the grantee's planned outcomes will be. Programs are expected to define strategies and activities that will ultimately assist them in providing stronger, focused programs that meet the needs of students.

All programs are required to enter student data into the state Management Information System (MIS) – known as UTopia – Utah Online Performance Information for Adult Education. Data entry must meet the standards and policies established in the Utah Adult Education Policy Manual and in the UTopia User Guide.

The USBE Adult Education Program Review Instrument (Appendix A) is the measurement tool that is used for all on-site program reviews. Program reviews are conducted with all programs at a minimum of every three years or as otherwise determined by the USBE. Reviews focus on:

- Administration - strategic planning specific to the advancement of adult education goals and objectives, daily operations, fiscal indicators and assessment of instructors.
- Curriculum and Instruction – quality of curriculum, quality of instruction, instructional materials, and professional development for teachers, instructors, staff and volunteers.
- Data Quality and Measurements - data collection and quality, educational gains and measurement.
- Stakeholders - student services, student retention and community partners.
- Facilities, Equipment, and Supplies

The USBE Adult Education Desk Monitoring process (Appendix B) is conducted monthly to discuss with the program director/coordinator data issues as observed in UTopia, ensuring that local programs maximize student outcomes by providing reasonable efforts in complying with the rules, policies and standards.

Three education measures are observed through the monthly desk monitoring process:

- Student Outcome Measures – the central element of effective programs includes pre and post-testing, education level gains, secondary diploma completion transitioning to post-secondary or training programs. Validating outcomes using follow-up surveys or data matching is essential for measurement.
- Data Process Measures – the collection of entering and ending data points of information (assessments) validating intensity and rigor of program outcomes.
- Program Process Measures – enrollment demographics, contact with a student – instruction and non-instruction contact time to produce outcomes; in addition to the procedures and services that affect student outcomes.

Written 10.25.07 Effective 11.19.07  
Revision 1.24.08 Effective 3.17.08  
Revision 2.23.10 Effective 4.7.10  
Revision 9.30.10  
Revision 9.27.11 Effective 9.27.11  
Revised 4.14 Effective 7.1.14

# Utah State Board of Education Adult Education Program Review Instrument

## Information Summary

<b>Program Reviewed</b>	
<b>Date of Program Review</b>	
<b>Local Program Director</b>	
<b>Local Program Coordinator(s)</b>	
<b>Name of Monitor(s)</b>	
<b>Date of Last Review</b>	

# Program Review Instrument

## Introduction

### Purpose

Recipients of state and/or federal adult education funding are subject to compliance with the purpose and requirements of the grant. The purpose of a program review is to examine evidence of compliance and to determine areas for program improvement and/or technical assistance.

Each program will be evaluated on each component. The rubric provided will identify strengths and areas of improvement for each component.

### Evaluation Process

Each content area will be reviewed for evidence/documentation supporting successful learner outcomes. Each component will be reviewed for specifics supporting state rules, policies and procedures. The monitor(s) will subjectively decide whether the content area reviewed is **commendable, meets expectations, needs improvement** or requires **corrective action**. The monitor(s) will make notes pertaining to each reviewed item in the comment box.

All evidence/documentation required is listed under each component and compiled in Appendix A. The monitor(s) will check “yes” or “no” indicating whether appropriate evidence/documentation is provided. If there is no evidence of a process validating a component, the monitor(s) will check the “No” box next to the component. Programs are expected to provide a narrative explaining each component in the comment box.

It is important to note that there are variables that affect each of the content areas listed below and the monitor(s) reviewing the program may ask questions to satisfy the requirements of the content area.

Programs will receive a written summary of the review that may include an additional follow-up visit(s).

### The Utah State Board of Education

The Utah State Board of Education will provide programs technical assistance as needed. Each review will be evaluated by the state Alternative and Adult Education Services coordinator. The review visit will be used as a tool to provide direct and immediate assistance to programs as a result of their individual review and subsequent review report summary. The Utah State Board of Education will also evaluate the state’s overall needs and plan professional development accordingly.

For more information contact:

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Content area or category	Components
1. Administration	Daily Operations Strategic Planning Fiscal Indicators Assessment of Instructors
2. Curriculum and Instruction	Quality of Curriculum Quality of Instruction Instructional Materials Professional Development for Teachers, Instructors, Staff, and Volunteers
3. Data Quality and Measurements	Data Collection and Quality Educational Gains Measurements
4. Stakeholders	Student Services Student Retention Community Partners
5. Facilities, Equipment and, Supplies	

# 1. Administration

1.1 Daily Operations	C	ME	NI	CA	N/A
Qualitative Indicators:					
Program has and maintains written <u>policies</u> (daily operation policies) and program <u>standards</u> defining how state adult education rules and policies are implemented in the areas of:					
A. Assessment and SEOP development					
B. Attendance policy					
C. Curriculum selection and delivery of instruction					
D. Student services; including career development, referral to community resources, transition to post-secondary and training opportunities, counseling, and Integrated Education and Training (IET)					
E. Fiscal Management					
F. Data interpretation, target, intensity and duration					
G. Staff meeting policy including expectation of attendance					
H. Recruitment and hiring of quality/qualified staff					
I. Safety and security					
J. Maintaining and archiving student records					

1.2 Strategic Planning	C	ME	NI	CA	N/A
Qualitative Indicators:					
Daily operations align with the approved state and/or AEFLA plan(s) in the following areas:					
A. Intensity and duration					
B. Data review and interpretation					
C. Marketing outreach practices					
D. Budget					
E. Program targets					

Program Director Comments:
USBE Monitor Comments:
Evidence Required:

<ul style="list-style-type: none"> <li>The program’s policies and procedures manual</li> </ul>					
<ul style="list-style-type: none"> <li>A minimum of 2 staff meeting agendas</li> </ul>					
<ul style="list-style-type: none"> <li>Five to ten student files from 5 years prior to the program review</li> </ul>					
1.3 Fiscal Indicators	C	ME	NI	CA	N/A
Qualitative Indicators:					
A. Revenues and expenditures are appropriately recorded, identified by funding streams and tracked.					
B. Supporting documentation is maintained for revenue and expenditures identified on the business administrator’s budget ledger.					
C. Written requests for approval are made to the USBE if a budget line item changes by 10% or more from approved state/federal budget line items. (Section 7: Financial Accountability)					
D. Federal reimbursement requests are made quarterly. (Tab J and Tab V)					
E. Independent legal audits are conducted annually. (Tab L)					
F. State funds remaining at the end of the fiscal year are approved by USBE as a carryover, and a revised state budget incorporating the carryover funds is submitted defining use for adult education services. (Tab J)					
G. The director/coordinator and all other staff members’ time allocated to adult education matches AEFLA and state budgets approved and on file with the Utah State Board of Education.					

Program Director Comments:

USBE Monitor Comments:

Evidence Required:

- A ledger, as defined by monitor, showing one quarter of expenses and revenues with supporting documentation clearly matching the ledger, including staff FTEs and funding streams.

1.4 Assessment of Instructors	C	ME	NI	CA	N/A
Qualitative Indicators:					
A. Teachers are evaluated at a minimum of an annual basis.					
B. All credits are issued by a licensed teacher (with proof of current Utah teaching license).					
C. Instructors are appropriately qualified for the position. All non-licensed employees are under the direct supervision of a Utah-licensed educator. (Tab T)					
D. Instructors and volunteers are evaluated on an annual basis.					

Program Director Comments:	
USBE Monitor Comments:	
Evidence Required:	
<ul style="list-style-type: none"> <li>• A copy of teacher evaluation forms</li> </ul>	
<ul style="list-style-type: none"> <li>• List of teachers, instructors, staff and volunteers with their qualifications and date of last review</li> </ul>	
<ul style="list-style-type: none"> <li>• Copy of selected teacher's, instructor's, staff's and volunteer's last evaluation form</li> </ul>	

## 2. Curriculum and Instruction

2.1 Quality of Curriculum	C	ME	NI	CA	N/A
Qualitative Indicators:					
A. Differentiated curriculum exists for ABE, ESL, GED® and AHSC (as applicable).					
B. Curriculum is culturally sensitive and allows for accommodations for special needs.					
C. Curriculum content and materials align with OCTAE CCR standards and State K-12 Utah Core Standards.					
D. The curriculum incorporates lesson plans, variety in instructional strategies, and the use of state CCR, K-12 Utah Core Standards, or ESL standards.					
E. Credit courses and associated credit allotments are reviewed and approved by the local board of education.					

2.2 Quality of Instruction	C	ME	NI	CA	N/A
Qualitative Indicators:					
A. Instruction incorporates adult learning styles and is individualized to meet student needs.					
B. Program intensity and duration are adequate for students to achieve goals and level gains.					
C. Credit awarded for ABE courses is approved by the local school board (please provide justification for this practice in the comments below).					

Program Director Comments:
USB E Monitor Comments:
Evidence Required:
<ul style="list-style-type: none"> <li>• A minimum of 2 lesson plans for each area served (ABE, ESL, GED, AHSC)</li> </ul>
<ul style="list-style-type: none"> <li>• A sample of curriculum for each area served (ABE, ESL, GED, AHSC)</li> </ul>

<ul style="list-style-type: none"> <li>• A scheduled classroom observation with the USBE monitor</li> </ul>	
<ul style="list-style-type: none"> <li>• Documentation of local school board approval of credit-bearing ABE courses</li> </ul>	

2.3 Instructional Materials	C	ME	NI	CA	N/A
Qualitative Indicators:					
A. Instructional materials support state-approved standards and objectives.					
B. A variety of adequate instructional materials are available for all students in all courses.					
C. Instruction is enriched with appropriate instructional technology and related resources such as computers, software, iPads, Smart Boards, etc.					
D. The instructional materials are current and relevant and are on a replacement rotation schedule.					
E. Instructional materials include information that allows for students to become aware of a broad range of careers, continued education, and/or training opportunities.					

Program Director Comments:	
USBE Monitor Comments:	
Evidence Required:	
<ul style="list-style-type: none"> <li>• Sample of Instructional materials for each area served (ABE, AHSC, ESL, GED).</li> </ul>	



## 1. Data Quality and Measurements

3.1 Data Collection and Quality	C	ME	NI	CA	N/A
Qualitative Indicators:					
A. Data is collected in an accurate/timely manner					
B. Student files contain all documentation pertinent to the student's education. (Tab B)					
C. Student files are kept in a secure location					
D. SSNs are blacked out or destroyed on all documents					
E. Only current and active staff members have access to UTopia					
F. Attendance and contact hours (including non-instructional hours) are entered into UTopia in a timely manner (i.e. at a minimum of bi-weekly)					
G. Students are either enrolled in classes or separated with accurate separation reasons					
H. UTopia student data matches paper files					
I. Teacher credential information is entered into UTopia and up to date					
J. Program site and class information is entered into UTopia and up to date					
K. Staff is assigned responsibility to ensure accurate data collection and reporting					

Program Director Comments:

USBE Monitor Comments:

Evidence Required:
<ul style="list-style-type: none"> <li>Sample of student files</li> </ul>

3.2 Educational Gains Based on EFL	C	ME	NI	CA	N/A
Qualitative Indicators:					
A. Program places students according to their Entering Functioning Level (EFL)					
B. Program appropriately post-tests students after 50 hour of instruction for ABE/AHSC students, 60 hours for ESL instruction, or 40 hours if it is known that the student is leaving and not returning. (Tab A)					

3.3 Measurements	C	ME	NI	CA	N/A
Qualitative Indicators:					
A. Assessment includes standardized testing (Tab A)					
B. Administration of pre- and post-tests is accurate and follow test publishers' protocol					
C. Assessment tools (TABE, CASAS, BEST), including test booklets, test forms, calculators, and scratch paper are stored securely					
D. Tests and testing materials are kept secure during the proctoring of a test.					
E. Testing protocol is followed, including the following (Tab A):					
1. Persons proctoring any state approved standardized tests are certified and their name appears on the USBE "approved assessor" list. The answer sheet contains the signature of the person administering the test. The staff demographic screen in UTopia matches the USBE "approved assessor" list					
2. The Test of Adult Basic Education (TABE) Locator is administered before a pre-test is given. The TABE 9 & 10 Levels E, M, D, and A is used as the standardized assessment for ABE/AHSC students					
3. The Basic English Skills Test (BEST) and BEST Plus 2.0 is used as the standardized test for English Language Learners (ELL). The BEST Plus 2.0 (for speaking and listening) Appraisal is administered first. (Print-based version only)					
4. The Comprehensive Adult Student Assessment System (CASAS) is used as the standardized test for English Language Learners (ELL). The CASAS oral screening (six questions) is administered first. Form 27 is given to low literacy ESL students to determine their Entering Functioning Level (EFL)					
F. All testing protocols are maintained for five years from the time of generation (effective 7.1.14)					

Program Director Comments:	
USBE Monitor Comments:	
Evidence Required:	
<ul style="list-style-type: none"> <li>Sample of student files</li> </ul>	

## 4. Stakeholders

4.1 Student Services	C	ME	NI	CA	N/A
Qualitative Indicators:					
A. Student comments and input are collected and considered for program improvement.					
B. Local economic service area needs are assessed based on demographic data in partnership with DWS.					
C. Marketing and recruitment efforts/methods are evident.					
D. Program involves students in leadership activities.					
E. Students are provided access to student counseling and referrals are made to community services. Students are transitioned to post-secondary education or training and/or employment.					
F. Transition services are provided to students including: support agencies (DWS, Vocational Rehabilitation, others), applied technology colleges, community colleges, etc.					
G. The program provides college and career related activities					
H. Accommodations are made for learning differences and/or all disabilities. (Tab E)					
I. Program recognizes student achievements.					
J. All programs and services are open and accessible to student and staff without regard to race, color, national origin, sex, disabilities and age as evidenced by non-discrimination statements in all public information. Promotional materials, registration, and other publications provide continuous civil rights notifications and grievance procedures (listing contact position, phone number and address).					

4.2 Student Retention	C	ME	NI	CA	N/A
Qualitative Indicators:					
A. Post-testing rates are at least 60% in each target area. At least 60% of post-tested students achieve a level gain.					
B. Each student has a SEOP that includes goals that are obtainable within the program year.					
C. 51% of all students have a documented social security number and a signed release waiver in UTopia. The signed release waiver is included in the student files.					

Program Director Comments:
USBE Monitor Comments:

Evidence Required:									
<ul style="list-style-type: none"> <li>• Sample of promotional materials, registrations, and other publications</li> </ul>									
<ul style="list-style-type: none"> <li>• UTopia data and reports</li> </ul>									
4.3 Community Partners					C	ME	NI	CA	N/A
Qualitative Indicators:									
A. Contracts, Memoranda of Understanding (MOU), or service agreements exist with partnering agencies.									
B. Program is represented at USBE required State/Regional Adult Education Director/Coordinator Meetings.									
C. Best practices are shared with other program directors/coordinators.									
D. Program director/coordinator attends local DWS regional/economic service area meetings at regular intervals. The service area committee consists of the following:									
1. The Department of Workforce Services									
2. The State Office of Rehabilitation									
3. Higher education									
4. The Utah College of Applied Technology									
5. Industry and employer representation									
6. Other appropriate agencies with the purpose of supporting the mission of adult education in Utah									

Program Director Comments:

USBE Monitor Comments:

Evidence Required:	
<ul style="list-style-type: none"> <li>• All contracts, MOUs, or service agreements with partnering agencies</li> </ul>	
<ul style="list-style-type: none"> <li>• List of current partners with contact information and services utilized for each partner</li> </ul>	

## 5. Facilities, Equipment, and Supplies

5.1 Facilities	C	ME	NI	CA	N/A
Qualitative Indicators:					
A. Program provides an appropriate adult learning environment with accessible, hazard-free facilities. (Tab E)					
B. Program facility is ADA accessible to all persons (including restrooms and classrooms).					
C. Storage space is functional and sufficient for instructional materials, supplies, and equipment.					
D. Classrooms and laboratories are safe, clean, properly maintained, and in good repair to provide an environment conducive to learning.					
E. Instructor workstations are adequate and appropriately equipped.					
F. Facilities are properly maintained to provide an environment conducive to learning.					

5.2 Equipment and Supplies	C	ME	NI	CA	N/A
Qualitative Indicators:					
A. Equipment provided is consistent with program objectives.					
B. Established procedures for the maintenance, repair, and replacement of equipment are followed.					
C. Supplies or an annual supply budget is provided to instructors.					
D. Program is adequately equipped and supplied to meet the needs of all students.					
E. An inventory of non-consumable items (teaching materials and equipment) is maintained and updated annually. Inventory includes fixed asset number (inventory control number), model number, date of purchase, funding source, serial number and purchase price. (Tab I)					

Program Director Comments:	
USBE Monitor Comments:	
Evidence Required:	
<ul style="list-style-type: none"> <li>An inventory of all non-consumable Adult Education instructional materials and equipment</li> </ul>	

## **Appendix A Evidence List**

Required evidence includes:

- The program's policies and procedures manual
- A minimum of 2 staff meeting agendas
- Five to ten student files from 5 years prior to the program review
- A ledger, as defined by monitor, showing one quarter of expenses and revenues with supporting documentation clearly matching the ledger, including staff FTEs and funding streams.
- A copy of teacher evaluation forms
- List of teachers, instructors, staff and volunteers with qualifications and date of last review
- A copy of selected teacher's, instructor's, staff's and volunteer's last evaluation form
- A minimum of 2 lesson plans for each area served (ABE, AHSC, ESL, GED)
- A sample of curriculum for each area served (ABE, AHSC, ESL, GED)
- A scheduled classroom observation with the USBE monitor
- Documentation of local school board approval of credit-bearing ABE courses.
- Sample of Instructional materials for each area served (ABE, AHSC, ESL, GED)
- NRS Training agenda and signed roll sheet for all staff members and/or certificate of completion of training from [nrsweb.org](http://nrsweb.org)
- List of Adult Learner Professional Development trainings attended by each instructor
- List of staff administering each standardized test and the date of the last test training attended for each staff member
- Sample of student files
- Sample of promotional materials, registrations, and other publications
- UTopia data and reports
- All contracts, MOUs, or service agreements with partnering agencies
- List of current partners with contact information and services utilized for each partner
- An inventory of all non-consumable Adult Education instructional materials and equipment

## **Appendix B**

### **List of UTopia Reports used**

- Program Retention Rate (Program Report)
- Target Level Gains and Post-testing Percentage Rate (Program Report)
- Performance and Completion (PAC) Report (Program Report)
- Current Staff Who Can Login (Staff report)
- Date of Attendance Last Taken (Staff report)
- Students Who Need Pre-Tests (Testing report)
- Student's Instructional Hours Since Last Test (Testing reports)
- Missing Student Information (Student Enrollment report)
- Unscheduled Students (Student Enrollment report)
- List of Currently Enrolled Students (Student Enrollment report)
- SSN and Release Waivers (Student Enrollment report)
- Teacher Evaluation: Student Growth (Staff report)

# **Desk Monitoring Policy**

## **USBE Adult Education Desk Monitoring Process**

Written 7.3.14 Effective 7.3.14

Revised 7.28.16 Effective 9.1.16

### **Appendix B:**

#### **Desk Monitoring Process**

Monthly, a USBE adult education specialist will schedule a desk monitoring appointment with each program director for the purpose of assisting overall program improvement and providing technical assistance. During each monitoring session, the specialist will: 1) review year-to-date outcomes using the desk monitoring tool; 2) discuss a monthly monitoring topic; 3) share statewide announcements and reminders about upcoming trainings; and 4) discuss program successes and challenges that may require additional technical assistance.

At the beginning of the fiscal/program year, the Desk Monitoring Tool will be made available, which will be used for providing and tracking monitoring points/outcomes during the program year. This document serves as a guide to aid you in completing the monitoring tools. UTopia reports are to be used in gathering data for each monitoring point.

#### **Prior to your scheduled monthly desk monitoring appointment:**

- a. Complete and save the desk monitoring tool to your desktop.
- b. Review the monthly monitoring topic and corresponding questions.
- c. E-mail the completed desk monitoring tool and question responses to your TA at a minimum of one day prior to the scheduled desk monitoring appointment.
- d. Be prepared to propose a date for your next desk monitoring appointment.

## **DESK MONITORING TOOL INSTRUCTIONS:**

1. **Date (Column A)** – Fill in the date that UTopia reports were run to generate the monitoring data. This should be done at least one day before the monitoring session.
  
2. **Number of Students Who Need a Pre-Test (Column B)** – Enter the number of students fitting this category using the “Students Who Need Pre-Tests” Report. To obtain the report, use the following parameters:
  - a. Select “entire program” for the current program year.
  - b. “Include students separated from program” – no.
  - c. “Include students previously in classes but not now” – yes.
  
3. **Number of Students Who Can Post-Test (Column C)** – Enter the number of students with 50+ instructional hours (note: 60+ hours for ELL students) using the “Students Instructional Hours Since Last Test” Report. To obtain the report, use the following parameters:
  - a. Select “entire program” for the current program year.
  - b. “Include students separated from program” – no.
  - c. “Include students previously in classes but not now” – yes.
  - d. Select 50 hours.
  - e. Select “ALL” for area of focus.
  - f. Sort the report by “Contact Hours.”
  
4. **“Potential Performers” Through “GEDs” (Columns D-K)** – Use the current PAC Report for the data in these columns. To obtain the report, use the following parameters:
  - a. Select “entire program” for the current program year.
  - b. “Show details” – no.
  - c. Sort status: any.
  - d. Transfer numbers from the PAC Report to the Monitoring spreadsheet.

5. **“Rate of Credit Acquisition”** (Column L) – Use the current SOR Report for the data in this column.
  - a. Select “entire program” for the current program year.
  - b. Scroll to the end of the report and look at the “total” row.
  - c. Take the “total contact hours” and divide by “credits”.
  - d. Divide that number by four to obtain the average contact hours per .25 credit for the program.
  
6. **All EFL’s Program Target Percentages to Date (Rows 21 - 31)** – Use the “Target Level Gains and Post-Testing Percentage Rate” Report to obtain and report outcome percentages:
  - a. Select “entire program” for the current program year.
  - b. “Only include distance learning students” – no.
  - c. “Only include students referred by DWS” – no.
  - d. “Only include Hispanic students” – no
  - e. Use the percentages from Column E of current year to fill in the boxes for each EFL.
  - f. Replace the “date” with the current date.
  
7. **First Time only:**
  - a. Run a PAC for the previous school year and use the data to fill in the “Last Year’s Totals” row.
  - b. Use the “Target Level Gains and Post-Testing Percentage Rate” Report to obtain and report outcome percentages for the previous year in the “Last Year’s Totals” column.

## **MONTHLY MONITORING TOPIC & QUESTIONS:**

### Sept: Program Intensity and Duration

1. How do you and your staff support students in attending a minimum of 6 hours per week?
2. What supplemental opportunities for instruction are offered for students?
3. How does the program utilize distance learning?

### Oct: National Reporting Standards

1. Has the program conducted annual NRS training with all staff?
2. What is the program's process for collecting SSN and Release Waivers?

### Nov: Rigor of Curriculum

1. What percentage of post-tested students earned a level gain? How does year-to-date data compare to last year?
2. Does the program's curriculum align with Adult Education CCR Standards and K-12 Utah Core Standards? If not, what is being done to implement them?
3. For ELL programs, does the program's curriculum incorporate requirements for civics education and mathematics?

### Dec: Fiscal Management

1. Has the program submitted its first quarterly reimbursement for each grant that is funded through a reimbursement process?
2. Has the program conducted an annual property inventory as outlined in Tab I of the policy guide?
3. What processes are in place to keep track of expenditures/budgets?

### Jan: Partnerships

1. What community partnerships are established? How are each of these partners utilized?
2. How does your program plan to increase the number of community partnerships or improve the quality of existing partnerships over the next 6 months?

Feb: Retention

1. Review the “Target Level Gains and Post-Testing Percentage Rate” Report and the “Retention” Report. Where are you losing your students?
2. What barriers keep students from participating in adult education and what strategies are being used to overcome them?

Mar: CCR Standards & Transitions

1. Describe the career pathways and transition services offered to students.
2. How do you utilize partners to expand career pathways and transition services?
3. How does your curriculum prepare students for career pathways?

Apr: Preparing for next year

1. Reflect on the current year. What has worked well? What needs to be improved?
2. Are the program’s written policies up to date? Do they support the program’s long term goals?
3. Have you revised your state plan for next year? How can your TA support you in writing your grants?

May: End-of-Year Tasks

1. Have you reviewed the UTopia End-of-Year Checklist? Who will complete each of the tasks and by when?
2. Are all grant balances expended? What purchases still need to be made? What reimbursements need to be submitted?
3. Review the professional development calendar for next year. Which trainings are you planning on having staff participate in? Which trainings do you think will be most helpful? Are there additional topics of professional development that would benefit your staff?

