

Adult Career Pathways Quarterly Report Instructions

2/2025

Adult Career Pathways

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Employment and Training Coordinator: Lynn Dahn (she/her)

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Adult Career Pathways Grant Coordinators:

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Sarah Lee (she/her)	Darcy Hokkanen (she/her)

Ground Rules

- Please make sure your microphone is muted before we begin.
- Please feel free to drop questions in the chat
- If you have any questions that are specific to your program, please reach out to your Grant Coordinator to discuss.
- This training is recorded and will be posted on ACP's main webpage.

What we will cover

- Purpose of Quarterly Reports
- What documents are needed before starting a quarterly report.
- How to fill out the budget and measurable outcomes table on the quarterly report.
- Pulling reports in Workforce One for the measurable outcomes table.
- Filling out the narrative portion of the quarterly report.

Purpose of Submitting Quarterly Reports

- Required by the State of MN for all ACP grants; listed within every contract.
- Per State of Minnesota's Office of Grants Management [policy 08-09](#) "Grant payments **shall not be made on grants with past due progress reports** unless the state agency has given the grantee a written extension."
- We expect Grantees are aware of the proposed outcomes versus actual outcomes.
 - Is your organization on track with spending?
 - Is your organization on track with meeting measurable outcomes?
- Track actual expenses vs. proposed expenses according to Grantee's executed contract
- Track actual measurable outcomes vs. proposed measurable outcomes according to Grantee's executed contract
- Share with DEED any success stories
- Share with DEED any challenges

Documents Needed

- The Grantee contract
- The RPR/FSR of the ending quarter's month that will be completed .
 - For example, if you are filling out the quarter report of 7/1/24 – 9/30/24, you will need the RPR for September 2024.
- The quarterly report template for the program to be filled out.
- The instructions for *How to Pull Reports in Workforce One*.
 - Please see Adult Career Pathways' main webpage for the quarterly report template and the instructions on how to pull reports in Workforce One.

Quarterly Report Grant Information



SFY 24-25 Direct Appropriation Grant Quarterly Progress Report

Verify you are using the
appropriate Template

SFY 24-25 Direct Appropriation Grant

Organization Name:

Grant ID #:

Reporting Quarter End Date: [Click or tap to enter a date.](#)

- Insert the name of your organization
- Insert the Grant ID# according to contract number
- Quarter date is the last day of the quarter you're reporting.

Examples:

Quarterly Report 7/1/23 – 9/30/23 Due by 10/31/23

Quarterly Report 10/1/23 – 12/31/23 Due by 1/30/24

Quarterly Report 1/1/24 – 3/31/24 Due by 4/30/24

Quarterly Report 4/1/24 – 06/30/24 Due by 7/30/24

Quarterly Report 7/1/24 – 9/30/24 Due by 10/30/24

Quarterly Report 10/1/24 – 12/31/24 Due by 4/30/25

Quarterly Report 1/1/25 – 3/31/25 Due by 4/30/25

Final Grant Report for 4/1/25 – 6/30/25 Due by 7/30/25

Expenditures

- Your ACP Grant is a 2-year contract, be sure to refer to your executed contract for the start/end date of the contract.
- When completing the Expenditures table, be sure to refer to submitted RPRs for dates, quarter end dates, and amounts.

SECTION 1:									
VENDOR ID + REMIT TO LOCATION CODE (SWIFT): 0000000					GRANT NAME: SFY24-25 Direct Appropriation				
VENDOR NAME: ABC Organization					GRANT NUMBER: 1234567			SWIFT CONTRACT ID: 0	
REMIT TO ADDRESS: 123 Baker Lane St Paul, MN 57859					GRANT PERIOD FROM: 7/1/2024			GRANT PERIOD TO: 6/30/2025	
					REIMBURSEMENT PERIOD FROM: 7/1/2024			REIMBURSEMENT PERIOD TO: 7/31/2024	
FORM PREPARED BY: Ern					INVOICE NUMBER:		GRANT NUMBER:		FINAL:
SIGNATURE:			Phone #000-000-0000				1234567		YES [] NO []
EMAIL: ERN@abc.org					DEED PROGRAM CONTACT NAME/PHONE: ACP Coordinator			DEED PROGRAM CONTACT EMAIL: ACP Coordinator email	
SECTION 2: * DEED PROGRAM USE ONLY									
SWIFT PO ID	PO LINE	AMOUNT	FUND	FIN DEPT ID	APPROP ID	ACCOUNT	AGENCY COST	PROJECT ID	
0000000	1	\$ 47,500.00	00000	00000	00000	00000	00000	00000	
0000000	1	\$ 47,500.00	00000	00000	00000	00000	00000	00000	
TOTAL		\$ 95,000.00							
SECTION 3A: First Year Funding SFY24 (PO 0000)									
ACTIVITY ID	COST CATEGORY DESCRIPTION (PER APPROVED BUDGET)			A. APPROVED BUDGET	B. PREVIOUS REIMB. REQUEST	C. REIMB. REQUESTED THIS PERIOD	D. (B + C = D) TOTAL REIMB.	E. (A - D = E) AVAILABLE BALANCE	F. UNSPENT OBLIGATIONS
833	Administrative Costs			\$ 400.00	\$ -	\$ -	\$ -	\$ 400.00	\$ -
885	Direct Services			\$ 27,000.00	\$ -	\$ -	\$ -	\$ 27,000.00	\$ -
886	Direct Services-WR-GED-ABE			\$ 1,100.00	\$ -	\$ -	\$ -	\$ 1,100.00	\$ -
838	Direct Customer Training			\$ 16,000.00	\$ -	\$ -	\$ -	\$ 16,000.00	\$ -
828	Support Services			\$ 3,000.00	\$ -	\$ -	\$ -	\$ 3,000.00	\$ -
TOTAL = FIRST YEAR FUNDING				\$ 47,500.00	\$ -	\$ -	\$ -	\$ 28,500.00	\$ -

Section A. Outcomes Report

A. Outcomes Report

1. Expenditures

(See your Budget for “Planned” data. Obtain “Actual” data from your end-of-quarter FSR/RPR.)

You'll need access to your executed contract, specifically the Budget Table(s) to fill out this section & the Reimbursement Payment Requests (RPRs) that have been invoiced to DEED.

You may need to connect with your organization's fiscal staff member to complete this section as well.

Expenditures (continued)

Refer to your Budget table in your contract or RPR. You enter your total year planned budget in this column. Once inserted, this amount does not need to be changed.

Cost Category	Total Planned Budget Grant start thru June 30, 2025	Planned Grant start thru end of reporting quarter	Actual Grant start thru end of reporting quarter
Administration Costs	\$	\$	\$
Direct Services	\$	\$	\$
Direct Services – WR-GED-ABE	\$	\$	\$
Direct Customer Training	\$	\$	\$
Support Services	\$	\$	\$
Outreach	\$	\$	\$
TOTAL FUNDS:	\$	\$	\$

Again, looking at the Budget table in your contract, enter in the projected amounts that were planned through this quarter. Example: the column that shows the quarter ending on 9/30/2023, enter in those amounts.

Refer to the last RPR submitted for this quarter.

For example, if 9/30/2023 is the end of the quarter then you will need to have your September RPR handy and will copy the amounts that your organization spent through the end of the quarter.

“Total Planned Budget” Contract

SFY25 - Total DEED Funds					
Office Use Only	Cost Category	Quarter 5 Grant Start Date through 09/30/2024	Quarter 6 Grant Start Date through 12/31/2024	Quarter 7 Grant Start Date through 03/31/2025	Quarter 8 Grant Start Date through 06/30/2025
833	Administrative Costs ²	\$500.00	\$600.00	\$800.00	\$1,000.00
885	Direct Services	\$35,700.00	\$42,000.00	\$46,500.00	\$50,000.00
886	Direct Services-WR-GED-ABE	\$2,000.00	\$3,300.00	\$4,500.00	\$5,000.00
838	Direct Customer Training	\$18,000.00	\$23,000.00	\$25,000.00	\$30,600.00
828	Support Services	\$3,700.00	\$5,000.00	\$7,700.00	\$8,400.00
	Total:	\$59,900.00	\$73,900.00	\$84,500.00	\$95,000.00

Review your contract cost categories to make sure it aligns with the expenditure table of the quarterly report.

For the “Total Planned Budget” on the quarterly report, refer to the final quarter of the budget table in your contract

“Planned Budget” Contract

For the “planned” budget column of the quarterly report, refer to the end date of the current reporting quarter of your contract.

SFY24 - Total DEED Funds					
Office Use Only	Cost Category	Quarter 1 Grant Start Date through 09/30/2023	Quarter 2 Grant Start Date through 12/31/2023	Quarter 3 Grant Start Date through 03/31/2024	Quarter 4 Grant Start Date through 06/30/2024
833	Administrative Costs ¹	\$200.00	\$250.00	\$320.00	\$400.00
885	Direct Services	\$12,000.00	\$15,000.00	\$22,000.00	\$27,000.00
886	Direct Services-WR-GED-ABE	\$330.00	\$550.00	\$700.00	\$1,100.00
838	Direct Customer Training	\$2,000.00	\$8,000.00	\$12,000.00	\$16,000.00
828	Support Services	\$800.00	\$1,500.00	\$2,700.00	\$3,000.00
	Total:	\$15,330.00	\$25,300.00	\$37,720.00	\$47,500.00

For example, if you are reporting for quarter 7/1/23 – 9/30/23 for your quarterly report, refer to end date of the reporting quarter within your contract. In this case, it would be quarter 1 (9/30/2023) within the budget table of your contract.

Actual Expenditures

RPR/FSR

For the “Actuals” column of the quarterly report, refer to the ending month’s RPR/FSR the current reporting quarter of your contract.

For example, if you are reporting for quarter 7/1/23 – 9/30/23 for your quarterly report, it would be the RPR/FSR for 9/1/2023 – 9/30/2023 as it is the ending month of the quarterly report.

SECTION 1:									
VENDOR ID + REMIT TO LOCATION CODE (SWIFT):				GRANT NAME:					
0000000				SFY24-25 Direct Appropriation					
VENDOR NAME:				GRANT NUMBER:			SWIFT CONTRACT ID		
ABC Organization				1234567			0		
REMIT TO ADDRESS:				GRANT PERIOD FROM:			GRANT PERIOD TO:		
123 Baker Lane				7/1/2024			6/30/2025		
St Paul, MN 57859				REIMBURSEMENT PERIOD FROM:			REIMBURSEMENT PERIOD TO:		
				9/1/2023			9/30/2023		
FORM PREPARED BY: Ern				INVOICE NUMBER:		GRANT NUMBER:		FINAL:	
SIGNATURE:		Phone #000-000-0000				1234567		YES [] NO []	
EMAIL:				DEED PROGRAM CONTACT NAME/PHONE:			DEED PROGRAM CONTACT EMAIL:		
ERN@abc.org				ACP Coordinator			ACP Coordinator email		
SECTION 2: * DEED PROGRAM USE ONLY									
SWIFT PO ID	PO LINE	AMOUNT	FUND	FIN DEPT ID	APPROP ID	ACCOUNT	AGENCY COST	PROJECT ID	
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0000000	1	\$ 47,500.00	00000	00000	00000	00000	00000	00000	
TOTAL		\$ 95,000.00							
SECTION 3A: First Year Funding SFY24 (PO 0000)									
ACTIVITY ID	COST CATEGORY DESCRIPTION (PER APPROVED BUDGET)			A. APPROVED BUDGET	B. PREVIOUS REIMB. REQUEST	C. REIMB. REQUESTED THIS PERIOD	D. (B + C = D) TOTAL REIMB.	E. (A - D = E) AVAILABLE BALANCE	F. UNSPENT OBLIGATIONS
833	Administrative Costs			\$ 400.00	\$ 200.00	\$ 23.50	\$ 223.50	\$ 176.50	\$ -
885	Direct Services			\$ 27,000.00	\$ 18,650.00	\$ 2,700.00	\$ 21,350.00	\$ 5,650.00	\$ -
886	Direct Services-WR-GED-ABE			\$ 1,100.00	\$ 500.00	\$ 120.00	\$ 620.00	\$ 480.00	\$ -
838	Direct Customer Training			\$ 16,000.00	\$ 12,000.00	\$ 3,000.00	\$ 15,000.00	\$ 1,000.00	\$ -
828	Support Services			\$ 3,000.00	\$ 1,700.00	\$ 650.00	\$ 2,350.00	\$ 650.00	\$ -
TOTAL = FIRST YEAR FUNDING				\$ 47,500.00	\$ 19,350.00	\$ 2,843.50	\$ 22,193.50	\$ 6,306.50	\$ -

Participant Outcomes

2. Participant Outcomes

See your Workplan for “Planned” data. Obtain “Actual” data from Workforce One [Reports](#).
Add/delete rows as needed to match your approved work plan.

You’ll need access to your executed contract, specifically the Work Plan Table(s), to fill out this section and you will need to run a few reports in WF1 to fill in the Actual column.

Utilize our “[How to Pull Reports in Workforce One Instructions](#)” on the [Resources and Guides](#) tab of [ACP’s main webpage](#) to complete this section. If you need more assistance, training is available through WF1; see Staff Training under the Resources tab for “[WF1 Reports and Advanced Search Training](#)”.



RESOURCES AND GUIDES

Workforce One (WF1)

- [ACP EDS Document Types](#)
- [ACP Workforce One User Guide](#)
- [How to Pull Reports in Workforce One Instructions](#)
- [User Instructions on Getting or Changing Workforce One Access](#)
- [Workforce One Provider Information Website with Additional Information](#)

Participant Outcomes (continued)

Measurable Outcomes
Total Participant Enrollments
Fill in with your organization's specific outcomes (found in your Work Plan Table)
Fill in with your organization's specific outcomes (found in your Work Plan Table)
Fill in with your organization's specific outcomes (found in your Work Plan Table)
Fill in with your organization's specific outcomes (found in your Work Plan Table)
Exits to Employment
<ul style="list-style-type: none"> Exits to Employment related to training industry sector(s) Exits to Employment at or above \$16/hour
Participants Exited to Post-Secondary Program(s)
All Other Exits
Total Exits

ACP Staff tailor each Quarterly Report template according to the program. However, some programs have measurable outcomes that vary from Grantee to Grantee. This will require you to review your organization's contract workplan table to fill in the specific measurable outcomes.

Be sure to edit the outcomes so they match what your Work Plan table in your contract shows your organization is tracking.

Measurable Outcome
Total Participant Enrollments
Total Participants Enrolled in CNA Training
Total Participants Completing CNA training
Total Participants Earning a Certificate (BLS/CPR)
Total Participants Obtaining a Credential
Exits to Employment
<ul style="list-style-type: none"> Exits to Employment related to training industry sector(s) Exits to Employment at or above \$16/hour
Participants Exited to Post-Secondary Program(s) (if applicable)
All Other Exits
All Exit Total

Participant Outcomes (continued)

Refer to your Work Plan table in your contract. You enter your planned total number of participants for Program start date thru end of the contract for each outcome in this column. Once inserted, this number does not need to be changed.

Measurable Outcomes	Total Planned Outcomes Grant start date thru June 30, 2025	Planned Grant start thru end of reporting quarter	Actual Grant start thru end of reporting quarter
Total Participant Enrollments			
Fill in with your organization's specific outcomes (found in your Work Plan Table)			
Fill in with your organization's specific outcomes (found in your Work Plan Table)			
Fill in with your organization's specific outcomes (found in your Work Plan Table)			
Fill in with your organization's specific outcomes (found in your Work Plan Table)			
Exits to Employment			
• Exits to Employment related to training industry sector(s)			
• Exits to Employment at or above \$16/hour			
Participants Exited to Post-Secondary Program(s)			
All Other Exits			

You will need to [run a few reports in WF1](#), to capture the actual number of participants for each outcome.

For the outcomes that are not being tracked in WF1 (specifically outlined within your contract; e.g., outreach events, car loans acquired), you need to refer to your organization's tracking system to capture the amounts.

Again, looking at your Work Plan table, enter in the projected amounts that were planned through this quarter. Example: the column that shows the quarter ending on 9/30/2023, enter in those amounts.

Total Planned Outcomes Contract

Measurable Outcome (continued)	Quarter 5 Grant Start Date through 09/30/2024	Quarter 6 Grant Start Date through 12/31/2024	Quarter 7 Grant Start Date through 03/31/2025	Quarter 8 Grant Start Date through 06/30/2025
Total Participant Enrollments	17	20	23	25
Total Participants Enrolled in CNA Training	17	20	23	25
Total Participants Completing CNA training	14	17	23	25
Total Participants Earning a Certificate (BLS/CPR)	6	10	10	14
Total Participants Obtaining a Credential	14	15	17	20
Exits to Employment	13	13	17	20
• Exits to Employment related to training industry sector(s)	10	10	13	15
• Exits to Employment at or above \$16/hour	13	13	16	17
Participants Exited to Post-Secondary Program(s) (if applicable)	0	1	1	1
All Other Exits	3	3	4	4
All Exit Total	16	18	22	25

For the “Total Planned Outcomes” column of the quarterly report, refer to end ending quarter of your contract’s workplan. In this example, quarter 8 is the ending quarter of the contract.

Planned Outcomes

For the “Planned Outcomes” column of the quarterly report, refer to ending quarter of the current quarterly report that you are reporting for. For example, if you are reporting for quarter 7/1/23 – 9/30/23 for your quarterly report, you would use quarter 1 (9/30/2023) outcomes in your contract when filling out the “planned” outcomes column of the quarterly report.

Measurable Outcome	Quarter 1 Grant Start Date through 09/30/2023	Quarter 2 Grant Start Date through 12/31/2023	Quarter 3 Grant Start Date through 03/31/2024	Quarter 4 Grant Start Date through 06/30/2024
Total Participant Enrollments	2	8	12	14
Total Participants Enrolled in CNA Training	2	8	12	14
Total Participants Completing CNA training	0	2	8	12
Total Participants Earning a Certificate (BLS/CPR)	0	0	4	6
Total Participants Obtaining a Credential	0	2	8	12
Exits to Employment	0	2	6	9
• Exits to Employment related to training industry sector(s)	0	1	5	5
• Exits to Employment at or above \$16/hour	0	2	5	9
Participants Exited to Post-Secondary Program(s) (if applicable)	0	0	0	0
All Other Exits	0	0	0	3
All Exit Total	0	2	5	12

Actual Participant Outcomes

For the “Actual” participant outcomes of the quarterly report outcomes, you would need to utilize Workforce One to pull reports of the actual data.

Refer to the [Resources and Guides](#) tab of [ACP’s main webpage](#) to access the “How to Pull Reports in Workforce One Instructions” document.

As a reminder, for the outcomes that are not being tracked in WF1 (specifically outlined within your contract; e.g., outreach events, car loans acquired, etc.), you need to refer to your organization’s tracking system to capture the amounts.

Calculating Participant Outcomes

3. If Expenditures and/or Participant Outcomes are not meeting (plus or minus 15%) planned outcomes, please explain.

Divide the number of outcomes met (Actual) by the number of outcomes (Planned) to achieve by the quarter end.

Example:

45 divided by 50 equals 0.90

Multiple 0.90 by 100 equals 90%

Measurable Outcomes	Total Planned Outcomes Grant start date thru June 30, 2025	Planned Grant start thru end of reporting quarter	Actual Grant start thru end of reporting quarter
Total Participant Enrollments	100	50	45

If expenditures or participant outcomes are not meeting planned outcomes and are under 85% explain the challenges faced. Or if the planned outcomes are over 85% explain the successes achieved.

Section B. Narrative

B. Narrative Report

1. Describe the major activities during this reporting period.

2. What were your successes for this reporting period? Share 1-3 anecdotes, stories, or other narratives.

3. a. What were some challenges you faced this reporting period, if any?

- b. What strategies did you develop to address these challenges, if applicable?

4. a. What are some updates/changes implemented since your most recent monitoring visit? *(N/A if monitoring visit has not occurred)*

- b. Are you working on any Areas of Concern or Corrective Action Items addressed during the visit? If so, please describe.

The Narrative section is for your organization to answer questions based on the quarter you are reporting.

Section B. Narrative (continued)

5. Subrecipients receiving over \$50,000 must be monitored by your organization. All subrecipient monitoring and contract documents must be made available to DEED upon request.

b. Does your organization utilize Subrecipients? If so, complete the table below

☐

Name of Subrecipient	Amount of Grant	Monitored Date
<input type="checkbox"/>	\$ <input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	\$ <input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	\$ <input type="checkbox"/>	<input type="checkbox"/>

If your organization utilizes subgrantees, be sure to complete this section. Monitoring of subrecipients over \$50,000 must occur once during the grant period and annually for subgrants over \$250,000.

OPTIONAL

6. a. Describe new partnerships developed during this reporting period, if any.

☐

b. What is working well?

☐

c. What needs improvement?


☐

7. What technical assistance/resources would be most helpful to you and your continued success?

☐


Please complete this section! ACP Coordinators will follow up with organizations who request technical support.

Signatures


Enter Your Name


Enter Your Title

Signature


Date

Who is completing this quarterly report? Don't forget the signature!

*Quarterly reports are due the 30th of the month following the end of the quarter.
April 30, July 30, October 30, and January 30*

A gentle reminder of quarterly report due dates throughout the year

Thank you!

Office of Adult Career Pathways