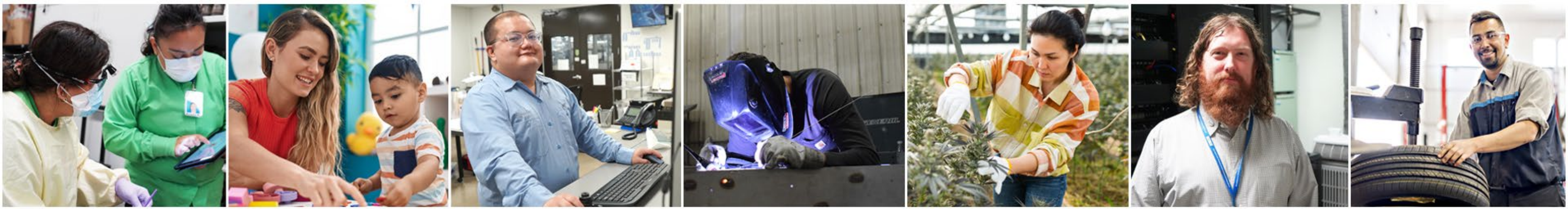

Dual Training Grant
2025 Reimbursement Workshop

Presented by: Jacquelynn Mol Sletten & Grace Ferdinandt
in collaboration with the Minnesota Dual-Training Pipeline Team

OFFICE OF
HIGHER EDUCATION

Welcome & Introductions

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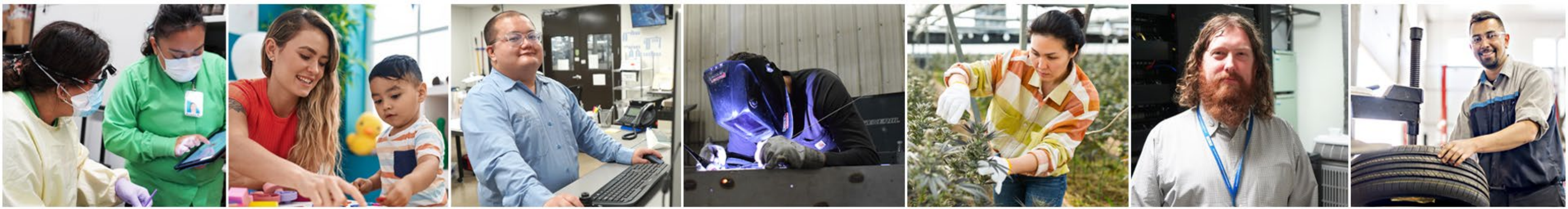
Agenda

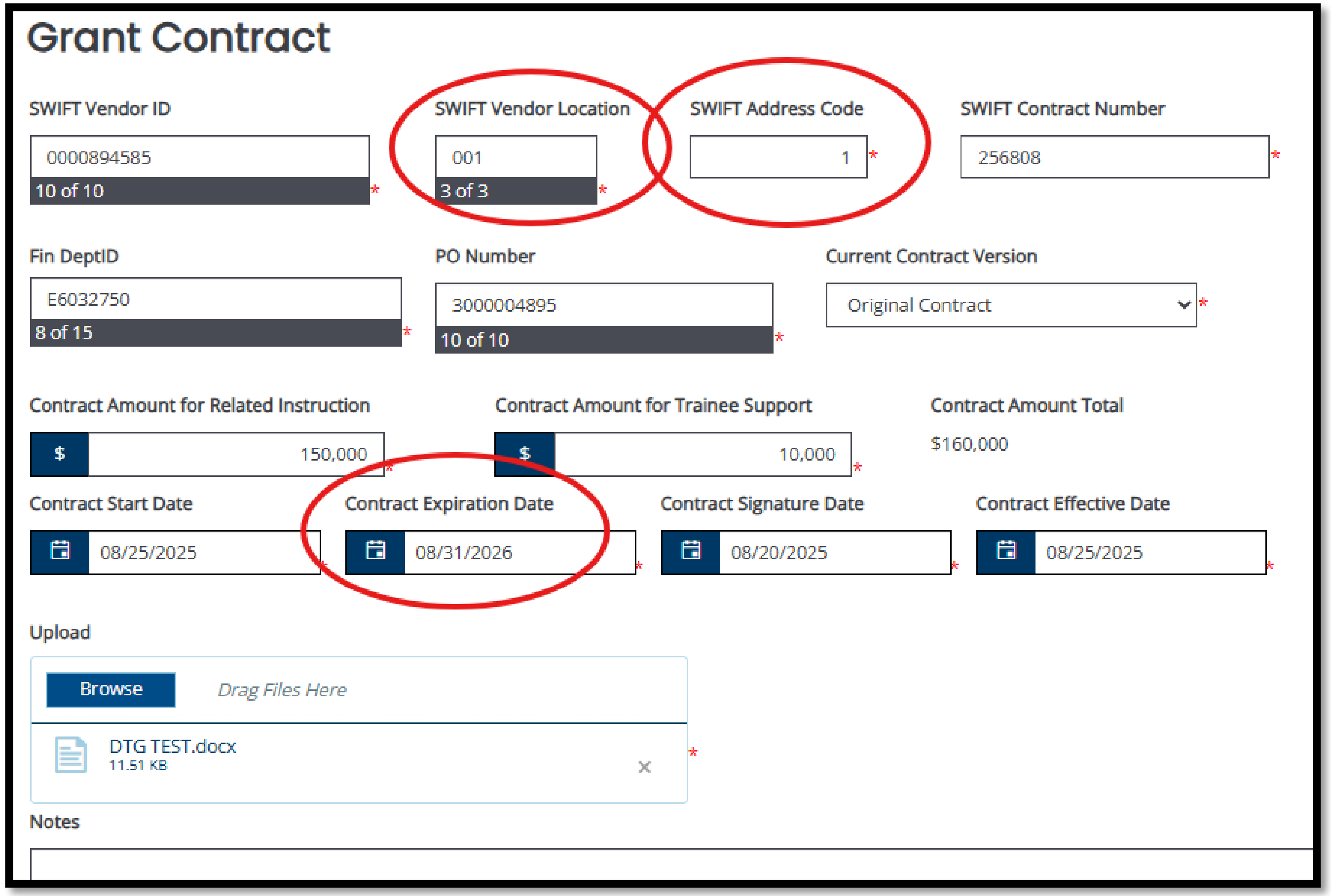
- Double-Checks
- Prior to Initiating a Reimbursement Request
  - ✓ Related Instruction Training Agreement(s)
  - ✓ Work Plan and Budget
  - ✓ Other Grant Documents
- Expenditures
  - ✓ Related Instruction Expenditures
  - ✓ Trainee Support Expenditures
  - ✓ Expenditures Overview
- Reimbursement Request
- Reimbursement Request Demonstration
- Financial Reconciliation
- Miscellaneous
- Upcoming Workshops & Events



Double-Checks

Verify the data inputted on the Grant Contract.

Notify the Office of Higher Education of any inaccuracies.



Grant Contract

SWIFT Vendor ID: 0000894585 (10 of 10) *

SWIFT Vendor Location: 001 (3 of 3) *

SWIFT Address Code: 1 *

SWIFT Contract Number: 256808 *

Fin DeptID: E6032750 (8 of 15) *

PO Number: 3000004895 (10 of 10) *

Current Contract Version: Original Contract *

Contract Amount for Related Instruction: $ 150,000 *

Contract Amount for Trainee Support: $ 10,000 *

Contract Amount Total: $160,000

Contract Start Date: 08/25/2025 *

Contract Expiration Date: 08/31/2026 *

Contract Signature Date: 08/20/2025 *

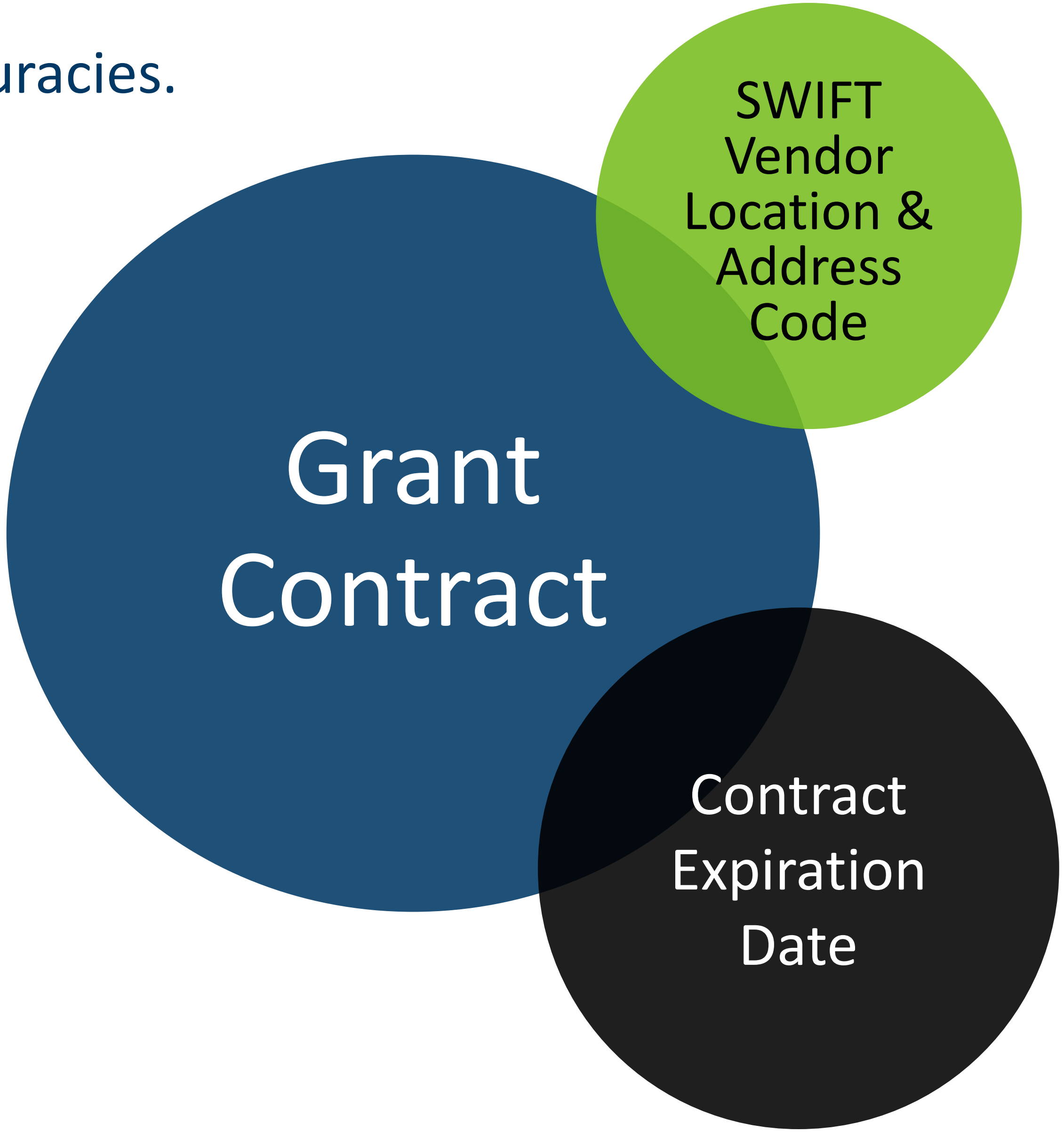
Contract Effective Date: 08/25/2025 *

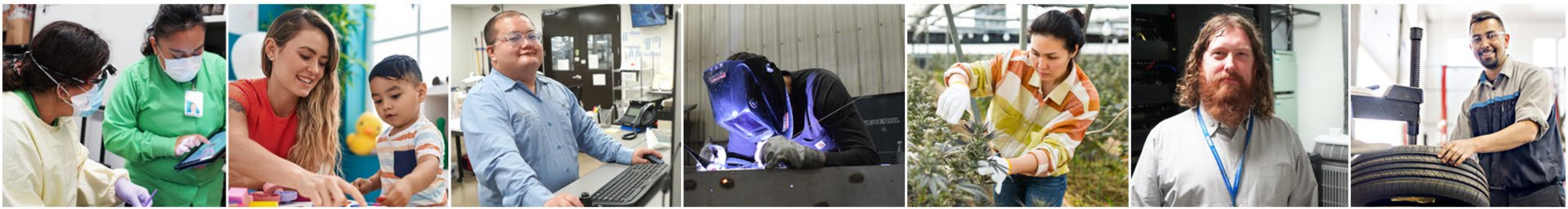
Upload

Browse *Drag Files Here*

DTG TEST.docx
11.51 KB *

Notes



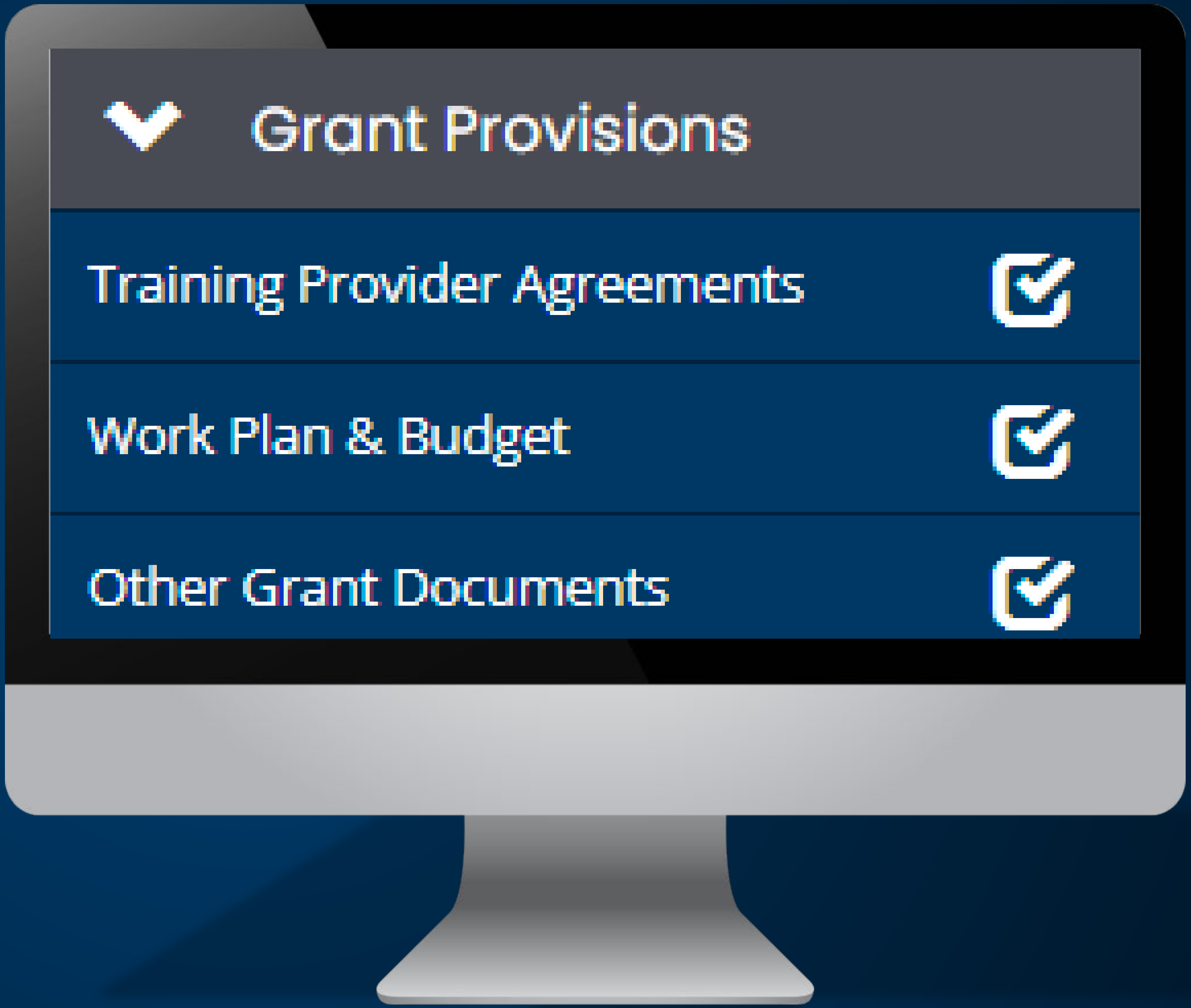


Prior to Initiating a Reimbursement Request

Prior to Initiating a Reimbursement Request

Grant provisions were due prior to executing a Dual Training Grant Contract.

Grant provisions ***MUST*** be complete prior to a dual trainee starting a course and/or on-the-job training.



Related Instruction Training Agreement(s)

Related Instruction Training Agreement submission is through the grants management system at https://gwi-ohe.intelligrants.com/.

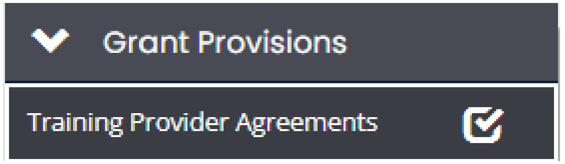
A grantee must submit a Related Instruction Training Agreement for each related instruction training provider, selected in the proposal, following award notification and prior to executing a grant contract with OHE. A grantee continuing instruction with a training provider, who participated in a previous DTG round, must also submit a new Related Instruction Training Agreement. Agreements are associated with individual grant contracts; therefore, do not carry-forward into future grant contracts.

The Related Instruction Training Agreement is not a legal contract between the applicant and related instruction training provider. The document is a means to affirm elements of planning for a dual-training program including, but not limited-to, program availability, student privacy policies, billing procedures, and DTG requirements. Grantees may pursue contracts with training providers but are not required to do so by the DTG.

Related Instruction Training Agreement(s)

Training Agreement Checklist

- ❑ A Training Agreement has been uploaded for each training provider in the portal
- ❑ Each Training Agreement has these sections complete:
  - ❑ Grantee Name/Info
  - ❑ Related Instruction Training Provider Name/Info
  - ❑ Minnesota Dual Training Pipeline Industry(s), Occupation(s), Degrees, Certificates, and/or Credentials
  - ❑ Acknowledgement of Dual Training Grant Partnership
    - ❑ Must acknowledge by checking each box
  - ❑ Grantee Authorized Representative Signature/Date
  - ❑ Training Provider Authorized Representative Signature/Date



Training Agreement Feedback

If you or a training provider has feedback about the Training Agreement process, please email the Office of Higher Education (OHE). OHE has been collecting some feedback and exploring options to improve the process.

Work Plan and Budget

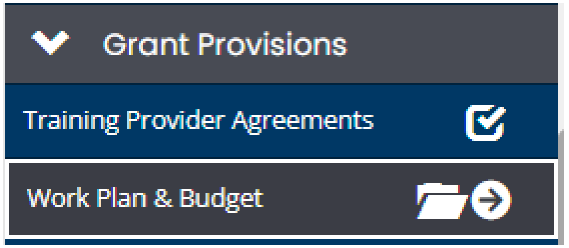
Work Plan and Budget submission is through the grants management system at https://gwi-ohe.intelligrants.com/.

A grantee must complete and submit a Work Plan and Budget document for each dual trainee following award notification and prior to executing a grant contract with OHE. The Work Plan and Budget includes detailed information about a dual trainee's related instruction, on-the-job training, and budget. Once the plan is approved, the grantee could make changes but must consult with OHE prior to making changes to the Work Plan and Budget.

Work Plan and Budget

WPB Checklist

- ❑ A Work Plan & Budget is complete for each trainee in the portal
  - ❑ Dual Trainee
  - ❑ Budget
  - ❑ Related Instruction Program
    - ❑ Related Instruction Program Period
  - ❑ On the Job Training Program



Other Grant Documents

Other Grant Documents submission is through the grants management system at https://gwi-ohe.intelligrants.com/.

Policies and Procedures: A grantee must submit a Policies and Procedures document detailing at minimum budget items among the categories of Related Instruction and Trainee Support. Dual trainees must be notified by the grantee about budget items within the Policies and Procedures prior to entering the dual-training program.

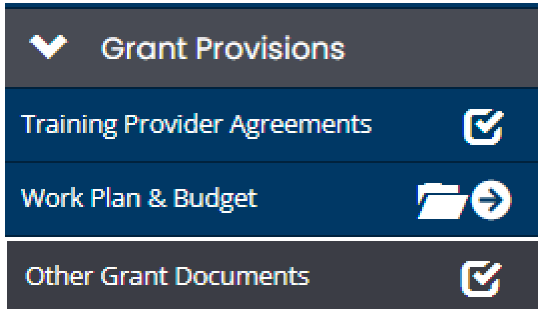
Dual Trainee Service Agreement: Dual Trainee Service Agreements are not required by OHE. Upon request, OHE may provide guidance on the use of service agreements but will not provide a standardized format for service agreements. Grantees may elect to implement Dual Trainee Service Agreements in conjunction with the DTG. If the terms of the service agreement are not met, a grantee cannot require a dual trainee to pay back any grant funds that were reimbursed through the DTG. If a grantee elects to utilize a service agreement, the grantee must submit a copy of the general agreement to OHE. The agreement copy is for record purposes only and submission of the agreement does not render the agreement legal, valid, or enforceable. OHE does not advise on legal obligations in relation to service agreements, so grantees are encouraged to consult with legal professionals. Grantees are encouraged to inform dual trainees of known legal implications and connect them with legal resources.

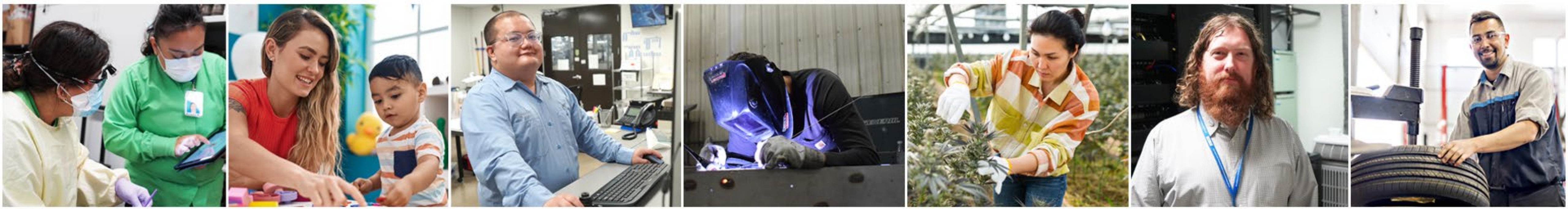
Program Ineligible for Financial Aid: If a related instruction program is ineligible for Federal Pell and/or Minnesota state grants, the grantee will provide OHE with documentation confirming the program is ineligible for financial aid.

Other Grant Documents

Other Grant Documents Checklist

- ❑ Policies and Procedures
- ❑ Dual Trainee Service Agreement
- ❑ Program Ineligible for Financial Aid





Expenditures

Dual Training Grant Expenditures

Grantees must review their current employee expenditure policies and determine how those policies will influence and/or interact with allowable expenditures through the DTG. Grantees must have written policies and procedures addressing DTG expenditures. Grantees are encouraged to research and inform dual trainees of additional financial and community services that may be available outside the DTG, so dual trainees have minimal out-of-pocket related instruction costs and have access to trainee support services.

Related Instruction Expenditures

The maximum grant request amount for Related Instruction expenditures is $150,000. A dual trainee may benefit from up to **$6,000** in Related Instruction expenditures.

Grantees who had annual gross revenue in the previous calendar year that exceeded $25,000,000 are required to contribute to at least 25% of Related Instruction expenditures. Therefore, a dual trainee may benefit from up to **$8,000** ($6,000 Grant + $2,000 Grantee) in Related Instruction Expenditures.

Important! The DTG will not pay a dual trainee directly for any Related Instruction expenditures. A grantee must directly pay for expenditures. Then, the grantee may request reimbursement from the DTG. A grantee cannot reimburse a dual trainee for tuition and fee expenditures and then request reimbursement from the grant. In some instances, a grantee may reimburse a dual trainee for exam fees (with industry governing organization), books, or material expenditures and then request reimbursement from the grant.

$6,000

- Grant Period Max

$24,000

- Grant Lifetime Max

Related Instruction Expenditures

Tuition

Fees

Books

Required and/or Recommended

Materials

Required and/or Recommended

Allowable grant expenditures for Related Instruction are limited to costs directly charged and/or required by related instruction training providers. Allowable grant expenditures categorized as fees extends to instances where an industry governing organization, other than the training provider, must administer examinations and award certificates or credentials. The training provider must ensure dual trainees are connected to governing organizations and follow through with exam procedures.

Related Instruction Expenditures

Unacceptable grant expenditures for Related Instruction include but are not limited to:

- Test-out fees
- Prior learning credit fees
- Federal or private educational loan fees
- Internship stipends
- Dual trainee wages
- Transportation
- Mileage
- Lodging
- Meals
- On-the-job training infrastructure
- Grantee administrative staff
- Grantee on-the-job training staff

Ineligible Expenditure

Courses at Another College or University

(Transfer Credit)

Trainee Support Expenditures

The maximum grant request amount for Trainee Support expenditures is up to 10% of the Related Instruction award amount (up to $15,000), **but a dual trainee is not subject to the percentage.**

Trainee Support expenditures are allocated to an individual dual trainee, **but a dual trainee is not subject to a maximum**. In addition, the allocated amount is **not** calculated into a dual trainee's lifetime DTG maximum.

Grantees are not required to contribute a percentage toward Trainee Support expenditures.

Important! The DTG will not pay a dual trainee directly for any Trainee Support expenditures. A grantee must either directly pay for the expenditures or reimburse a dual trainee for expenditures. Then, the grantee may request reimbursement from the DTG.

Transportation: Regarding Gas Gift Cards, the grantee must purchase the original gift card within the contract period. A dual trainee cannot purchase the card on their own behalf.

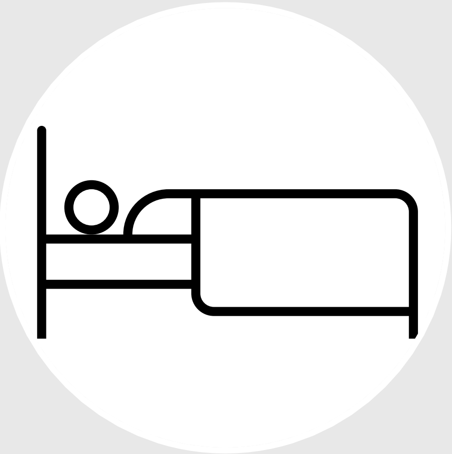
Trainee Support Expenditures

Transportation

Gas (only) card purchases.
Public transportation fees.
Occasional vehicle rental costs.
Occasional group busing costs.

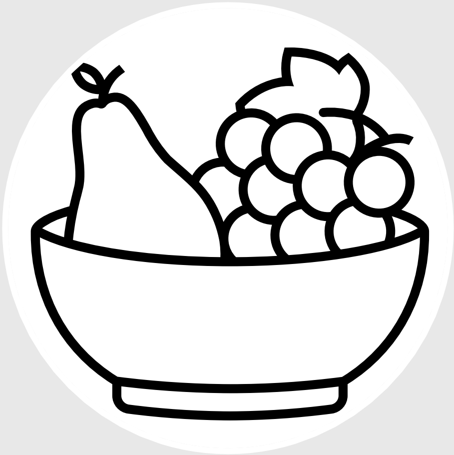
Mileage

To and/or from related instruction program.
Cannot exceed current Federal IRS mileage reimbursement rate on the most direct route.



Lodging

Temporary lodging while attending related instruction program.



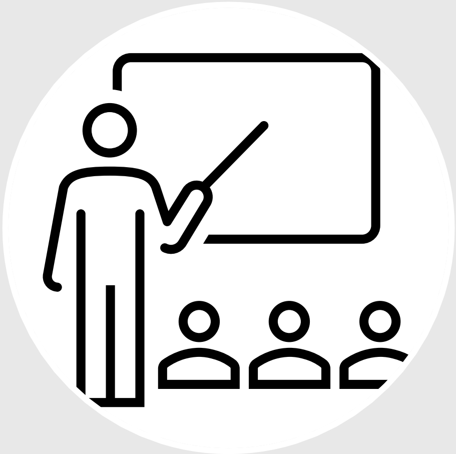
Meals

Meal costs of dual trainees while attending related instruction program.

Allowable grant expenditures for Trainee Support are limited to costs directly associated with dual trainees and their related instruction. Expenditures of transportation, mileage, lodging, and meals must occur within Minnesota or the surrounding states of Iowa, North Dakota, South Dakota, or Wisconsin.

Transportation: **NEW!** Statement of Acknowledgement

Trainee Support Expenditures



Tutoring Services

Dual trainees to receive tutoring services for related instruction program.

Translation, Interpreter, and/or Accessibility Services

Dual trainees to receive services for their related instruction program.

Trainee Support Expenditures

Trainee Support Expenditures must occur during the same term or period of Related Instruction Expenditures.

If a dual trainee is attending a term but the Dual Training Grant will <u>not</u> be supporting the related instruction costs … the Dual Training Grant <u>cannot</u> support the trainee support costs.

Program Period	Attending	DTG: Related Instruction	DTG: Trainee Support
Fall Term	Yes	Yes	Yes
Spring Term	Yes	Yes	Yes
Summer Term	Yes	**No**	**No**

Trainee Support Expenditures

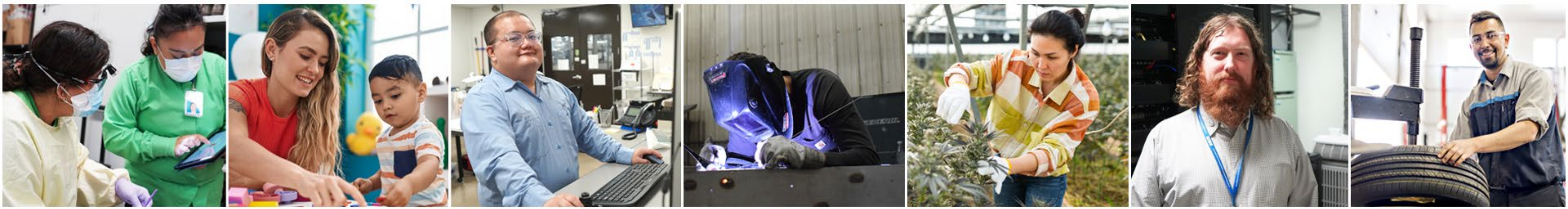
Unacceptable grant expenditures for Trainee Support include but are not limited to:

- Related instruction tuition, fees, books, or materials
- Airfare
- Housing (rent or mortgage)
- Utility bills
- Internet or phone services
- Dependent care costs
- Medical insurance
- Grantee-owned vehicle purchase, repairs or insurance
- Trainee-owned vehicle purchase, repairs or insurance
- Unspecified gift cards
- Career navigator services
- Grantee administrative staff
- Grantee on-the-job training staff

Trainee Support funds cannot be a supplement for when Related Instruction funds are insufficient.

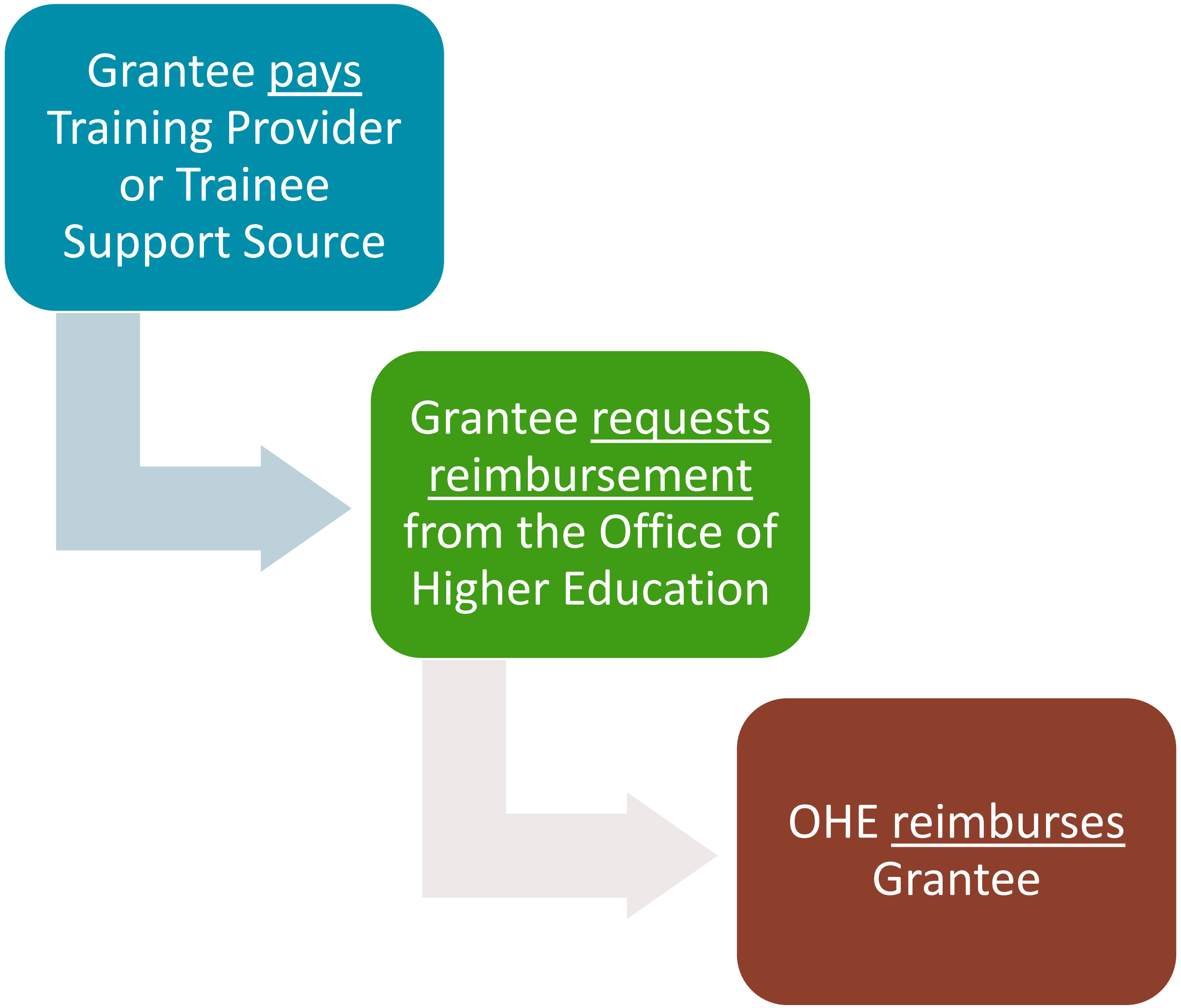
Expenditures Overview

Expenditure	Related Instruction	Trainee Support	Required Grantee Match	Calculated toward Dual Trainee Grant Period Maximum	Calculated toward Dual Trainee Lifetime Maximum
Tuition	Yes	No	Yes	Yes	Yes
Fees (Including Exams/Licensure)	Yes	No	Yes	Yes	Yes
Books	Yes	No	Yes	Yes	Yes
Materials	Yes	No	Yes	Yes	Yes
Transportation	No	Yes	No	No	No
Mileage	No	Yes	No	No	No
Lodging	No	Yes	No	No	No
Meals	No	Yes	No	No	No
Tutoring Services	No	Yes	No	No	No
Translation, Interpreter and/or Accessibility Services	No	Yes	No	No	No



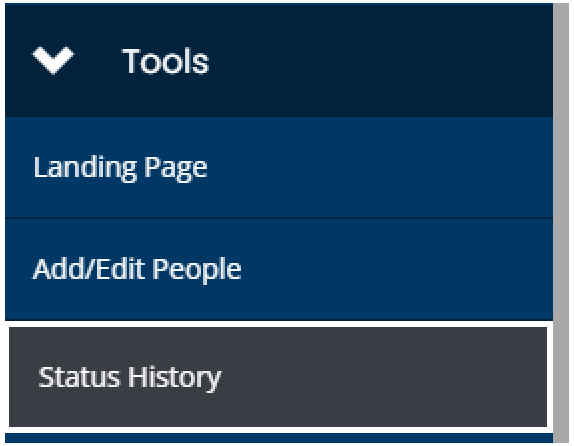
Reimbursement Request

Reimbursement Request



Reimbursement Request

Grantee will utilize the portal to initiate and complete reimbursement requests at https://gwi-ohe.intelligrants.com/



Grantee's Responsibility

Grantee: Reimbursement Status
Reimbursement in Process
Dual Training Information Data Entry
Submit Reimbursement
Modifications Required for Reimbursement

OHE: Reimbursement Status
Reimbursement in Review
Reimbursement Approved
Fiscal User 1 Review
Fiscal User 2 Review
Financial Review Complete
SWIFT Payment Submission
SWIFT Payment Process
SWIFT Payment Final

Reimbursement Request

Must request reimbursement **no later than 45 days** after the end of a term or set of courses.

4.2 ***Payment***

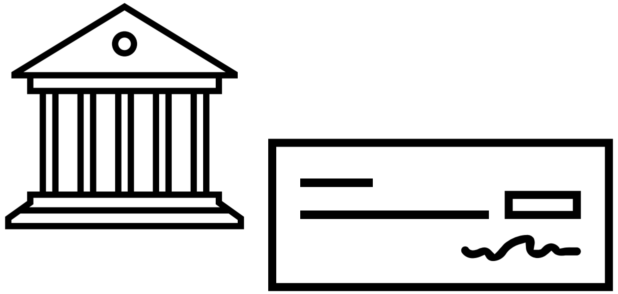
(a) ***Invoices***

The State will promptly pay the Grantee after the Grantee presents an itemized invoice for the services actually performed and the State's Authorized Representative accepts the invoiced services. Invoices must be submitted timely and according to the following schedule:

- The Grantee must submit an invoice no later than **45 days** after the end of a term or set of courses.

OHE Financial Services reviews and processes payments once per week.

OHE Grants & Workforce Initiatives will notify grantee of when the grantee can expect receipt of the payment. **Notify your Business Office** to anticipate the payment.



Reimbursement Request

Training Cost **Match Requirement** for Large Employers: If annual gross revenue exceeded $25,000,000 in the previous calendar year (2024), the grantee must pay for at least 25% of the training provider's charges for related instruction. Wages and/or in-kind contributions cannot be considered as part of the 25% contribution.

Related Instruction per Dual Trainee

$6,000 Maximum Dual Training Grant
<u>$2,000 Maximum grantee contribution</u>
$8,000 maximum total

Trainee Support per Dual Trainee

- No maximum for dual trainee
- No required grantee contribution
- Must remain within contract budget

Example

Fall Term: $3,750 (cost) - $937.50 (match) - $0.00 (trainee) = $2,812.50 (grant)
<u>Spring Term: $4,800 (cost) – 1,062.50 (match) - $550.00 (trainee) = $3,187.50 (grant)</u>
Total Year: $8,550 (cost) - **$2,000** (match) - $550 (trainee) = **$6,000** (grant)

Reimbursement Request

Documents to upload for Reimbursement Request

Related Instruction

- ❑ Dual trainee schedule (including trainee's name, course titles, course dates, and other course details
- ❑ Dual trainee itemized bill
- ❑ Invoice from the Training Provider
- ❑ Proof of payment to the Training Provider

❖ **Books or Materials (purchased outside of training provider)**

- ❑ Documentation from the Training Provider stating the requirement or recommendation
- ❑ Original purchase receipt
- ❑ Proof of payment by the Grantee or proof of reimbursement to the Dual Trainee

The Grantee must provide the State with supporting documentation, and the State may request additional documentation.

Reimbursement Request

Documents to upload for Reimbursement Request

Trainee Support

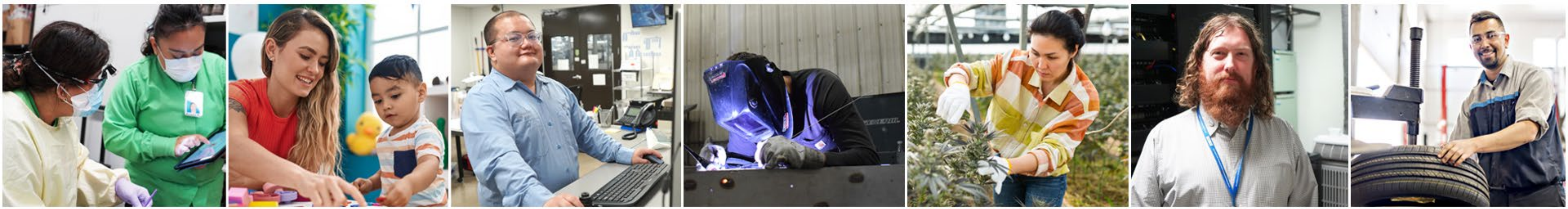
- ❑ Original receipt, record, or ledger
- ❑ Proof of payment from grantee to dual trainee or trainee support source

❖ **Transportation: Gas Gift Card**

- ❑ Original receipt (from gas station)
- ❑ Organization statement showing proof of payment
- ❑ Acknowledgement of receipt form signed by dual trainee and grantee

Important! The grantee must purchase the original gift card within the contract period. A dual trainee cannot purchase the card on their own behalf.

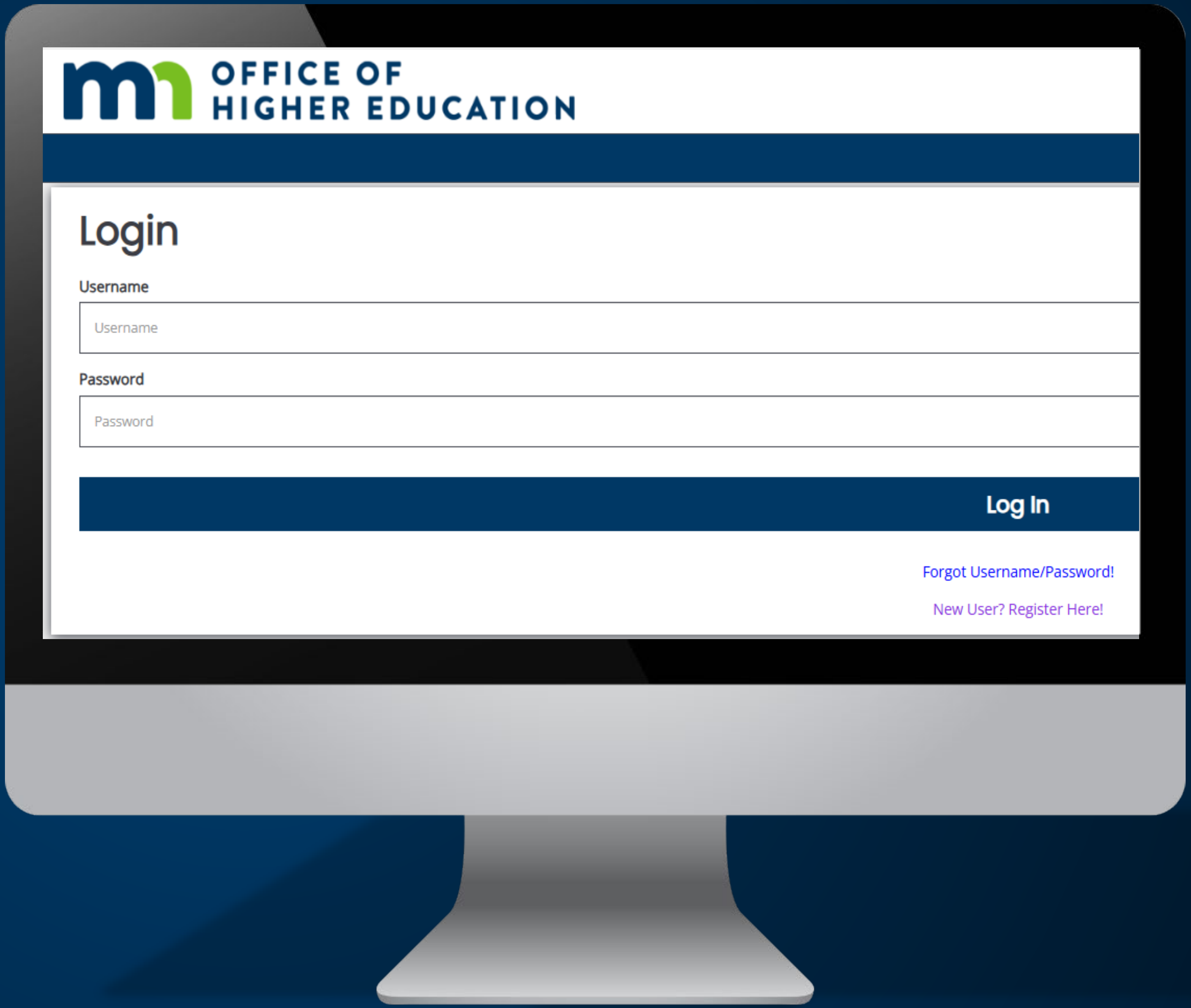
The Grantee must provide the State with supporting documentation, and the State may request additional documentation.



Reimbursement Request Demonstration

https://gwi-ohe.intelligrants.com/

All Reimbursement Requests are submitted and processed through the online grants management system



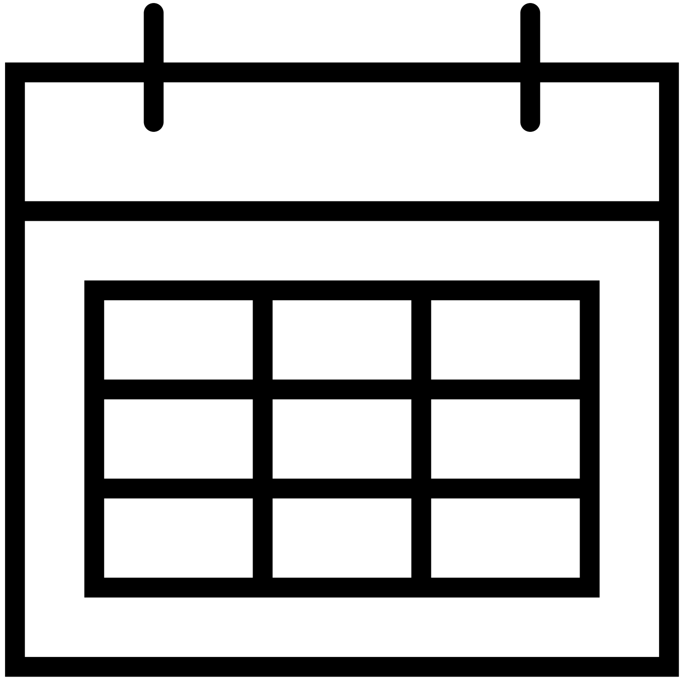
Reimbursement Request Demonstration

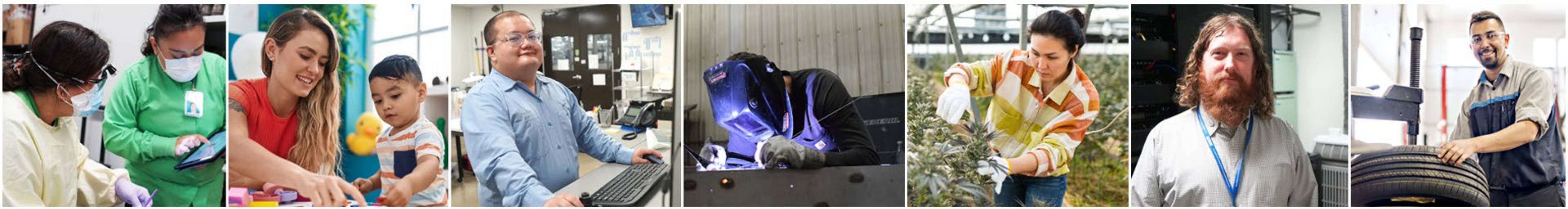
As of 9/25/2025 ...

Goal is to have 2025 DTG Reimbursement Request process **LIVE** by **October 13, 2025**.

When a grantee receives a check or electronic payment from the grant, the payment will be labeled with “DTG – 2025” and be from the Minnesota Office of Higher Education.

Grantees must notify their Business Offices to anticipate the payment.





Financial Reconciliation

Financial Reconciliation

What is financial reconciliation?

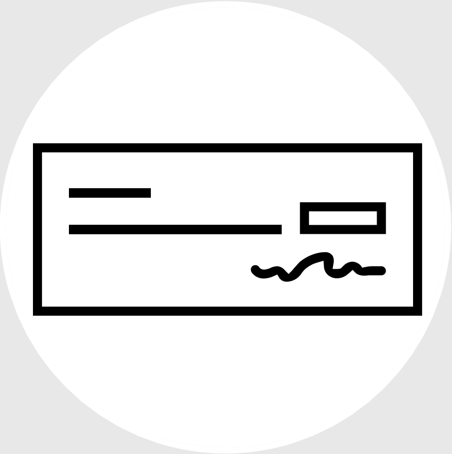
- Financial reconciliation is the process of reconciling a grantee's reimbursement request for a given period with supporting documentation for that request, such as purchase orders, receipts, payroll records, canceled checks, bank statements, general ledger records, etc.
- OHE must perform a financial reconciliation of at least one reimbursement request from each grantee during the grant period
- This is a requirement of the Minnesota Department of Administration via the Office of Grants Management as well as OHE's own Grants Policies and Procedures

Financial Reconciliation

What interaction will the Grantee have with OHE Audit?

- The OHE Audit Unit is part of OHE’s Legal and Compliance Division
- The Audit Unit is comprised of the audit manager and four auditors
- The Audit Unit communicates directly with the grantee via the contact information provided by OHE’s Grants and Workforce Initiatives Division (GWI)
- The Audit Unit recognizes that each grantee has its own financial recordkeeping system and will work with each grantee to obtain answers and documentation to complete the financial reconciliation process

Financial Reconciliation



Reimbursement request is in SWIFT Payment Final status

OHE Audit will review payment and supporting documents

OHE Audit will have initial conversation with grantee and determine additional documentation required for review.

OHE Audit will send grantee a list of questions and requests. The grantee will be provided a deadline to respond.

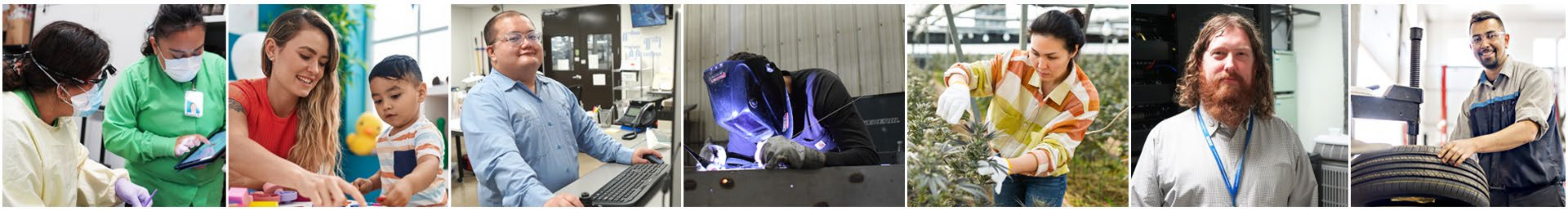
Financial Reconciliation

OHE Audit will review responses and documents.

OHE Audit will discuss the review with OHE Grants & Workforce

OHE Audit will issue a final Financial Reconciliation Report. A copy of the report will be emailed to the grantee.

Financial reconciliation could begin as early as November 2025.



Miscellaneous

Tax Benefits & Implications

Tax Benefits & Implications

Federal and state income tax filers may be eligible for tax credits, tax deductions, and exclusions from gross income if enrolled in a U.S. Department of Education eligible institution. OHE provides resources related to tax benefits online at https://www.ohe.state.mn.us/mPg.cfm?pageID=106. Grantees should give attention to IRS Publication 970 Tax Benefits for Education (https://www.irs.gov/publications/p970), Chapter 10 Employer-Provided Educational Assistance (https://www.irs.gov/pub/irs-pdf/p970.pdf). Chapter 10 addresses benefits over $5,250 and Working Condition Fringe Benefits, which may apply to DTG funds. OHE does not advise on tax benefits or obligations, so grantees are encouraged to consult with tax professionals. Grantees are encouraged to inform dual trainees of known tax implications and connect them with tax resources.

Progress Reports & Grant Monitoring

Progress Reports

Progress Report due **February 28, 2026**

Final Progress Report due **September 30, 2026**

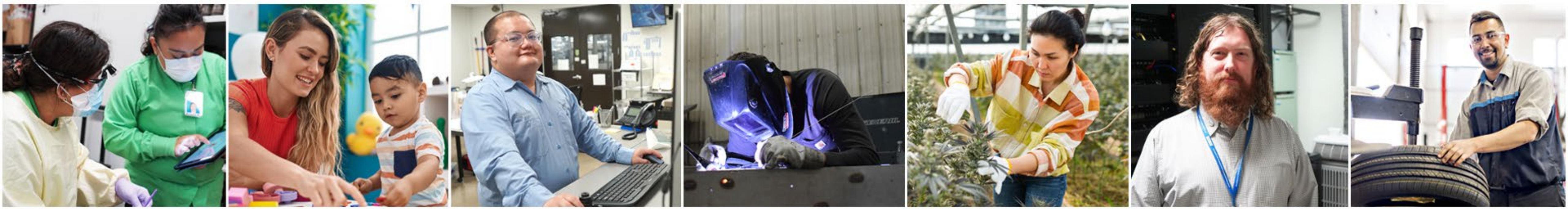
- DTG Administration
- DTG Progress
- DTG Challenges
- DTG Best Practices
- DTG Testimony
- DTG Additional Topics

Grant Monitoring

October 2025 through April 2026

Communication

Is the Grantee Authorized Representative receiving communication from the Minnesota Office of Higher Education?



Upcoming Workshops & Events

Upcoming Workshops: Dual Training Grant

Grantee Workshops

https://ohe.mn.gov/outreach-professional-resources/competitive-grants/dual-training-grant/dual-training-grant

- 2025 DTG Open Office Hours (virtual)
  - October 2, 2025 @ 9:00am
  - January 8, 2026 @ 9:00am
  - February 5, 2026 @ 9:00am
  - May 7, 2026 @ 9:00am
- 2025 DTG Reports & Next Term Prep Workshop
  - Thursday, December 11, 2025 from 1:00pm to 2:00pm

Upcoming Events: MN Dual-Training Pipeline

Workforce Community Conversations:

- Oct. 2, 2025, from 10 to 11:30 a.m. at the Rochester Area Chamber of Commerce, Rochester. View the event flyer for more details.
- Oct. 7, 2025, from 10:30 a.m. to noon at the Redwood Area Community Center, Redwood Falls. View the event flyer for more details.
- Oct. 8, 2025, from 10:30 a.m. to noon at Dakota County Technical College (Dakota Room), Rosemount. View the event flyer for more details.
- Oct. 15, 2025, from 10:30 a.m. to noon at Maple Grove Community Center, Maple Grove. View the event flyer for more details.

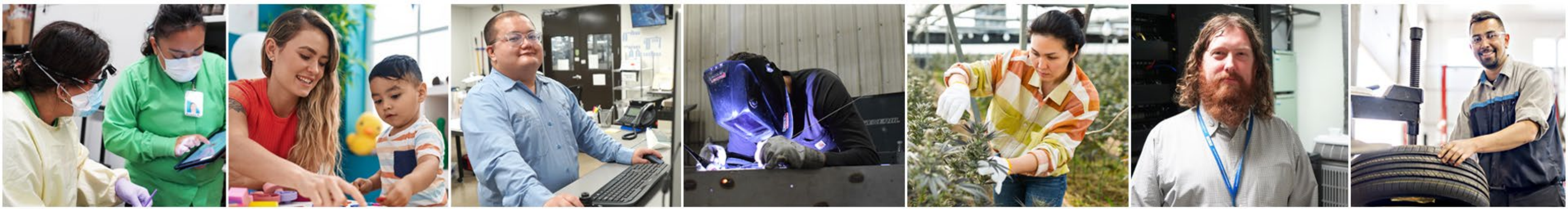
Upcoming Events: MN Dual-Training Pipeline

Industry Forums:

- Oct. 21, 2025, 9 to 10 a.m.: Child Care Industry Forum
- Oct. 21, 2025, 1 to 2 p.m.: Advanced Manufacturing Industry Forum
- Oct. 22, 2025, 9 to 10 a.m.: Transportation Industry Forum
- Oct. 22, 2025, 1 to 2 p.m.: Legal Cannabis Industry Forum
- Oct. 23, 2025, 9 to 10 a.m.: Health Care Services Industry Forum
- Oct. 28, 2025, 9 to 10 a.m.: Information Technology Industry Forum
- Oct. 28, 2025, 1 to 2 p.m.: Agriculture Industry Forum

Speaker Series:

Join the next Speaker Series event from 9 to 10 a.m. on Nov. 18, 2025, featuring Rachel Rouse of Emerge Coaching and her presentation "Diverse Minds, Unified Goals: A Journey into Neurodiversity at Work." Learn more and register.



Questions?

Thank you!