

Dual Training Grant

2026 Reimbursement Workshop

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

OFFICE OF HIGHER EDUCATION

Welcome & Introductions

OFFICE OF HIGHER EDUCATION



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Welcome & Introductions

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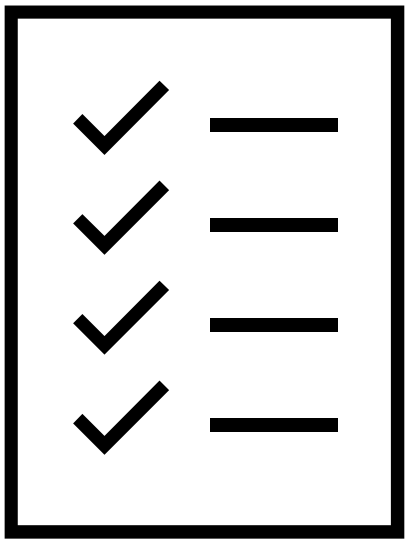


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*Child Care
*Transportation

Agenda

- **Double-Checks**
  - ✓ DTG Posted on Grantee's Website
  - ✓ Grant Contract Information
- **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 Dates, Workshops & Events**





Double-Checks

7.3 The Grantee must clearly post on the Grantee's website the names of, and contact information for, the Grantee's leadership and the employee or other person who directly manages and oversees this Grant Contract Agreement on behalf of the Grantee.

Must email Grace & Jacquelynn with the website link, so they can review.

https://www.healthpartners.com/institute/about/

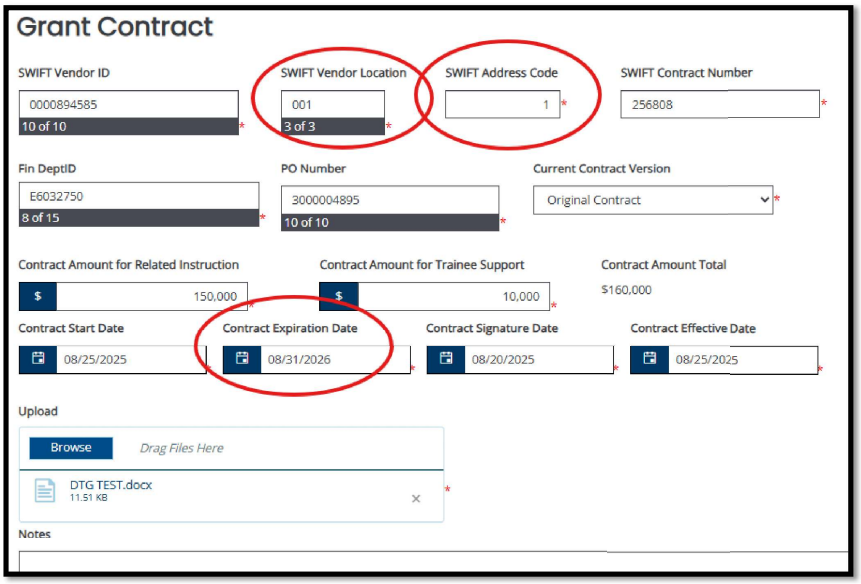
> HealthPartners Institute is a recipient of the Dual Training Grant through the Minnesota Office of Higher Education. Michelle Noltimier (Michelle.T.Noltimier@HealthPartners.com) is the primary contact for grant leadership, and InstituteFinance@HealthPartners.com is the primary contact for grant administration and management.

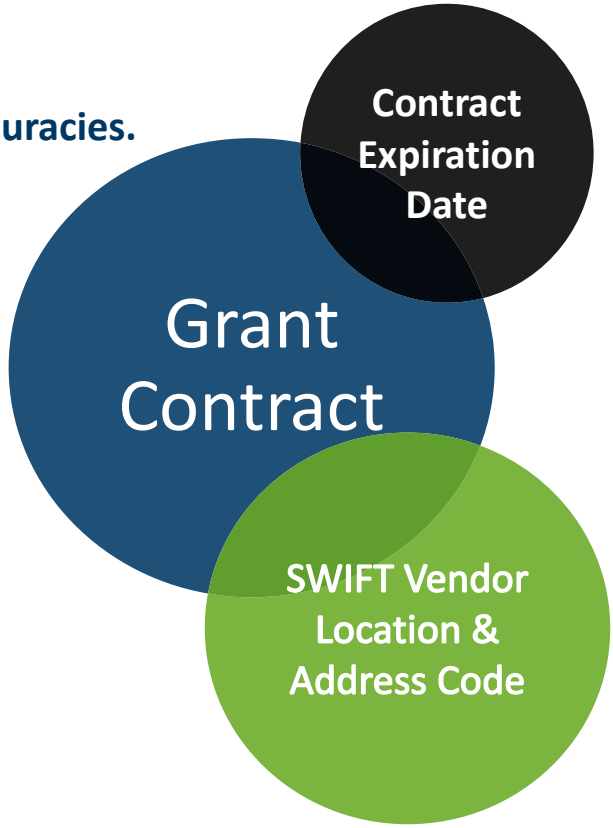
https://www.aagard.com/careers



Aagard is a recipient of the Dual Training Grant through Minnesota's Office of Higher Education. The grant contract is overseen by **Sharlo Meyer**, Director of Human Resources & Organizational Development, who can be reached at **snmeyer@aagard.com** or **320.763.6043**. The grant is administered by **Dave Lamb**, Training & Safety Administrator, and **Kaylee Svee**, Talent Acquisition & Marketing Specialist. Dave can be reached at **dalamb@aagard.com** or **320.763.6043**, and Kaylee can be reached at **kgsvee@aagard.com** or **320.763.6043**.

Verify the data inputted on the Grant Contract.
Notify the Office of Higher Education of any inaccuracies.





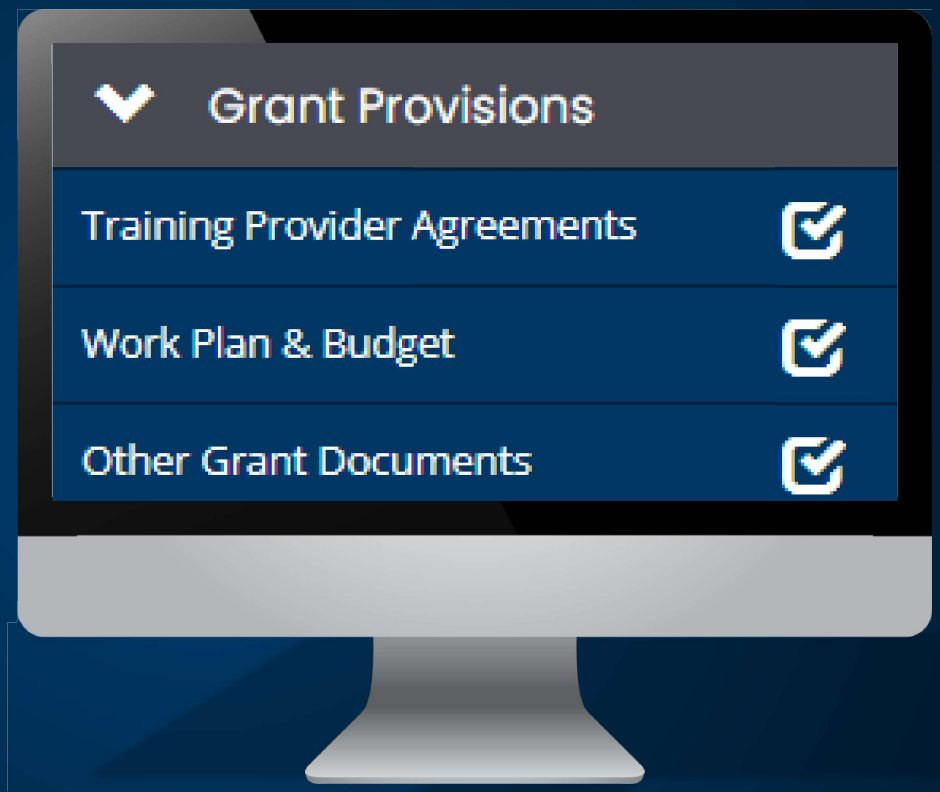


Prior to Initiating a Reimbursement Request

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.



Grant Provisions Checklists

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

WPB Checklist

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

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
- Courses at another college or university (Transfer Credit)

Trainee Support Expenditures

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.

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 and distribute the original gift card within the contract period. A dual trainee cannot purchase the card on their own behalf.

Trainee Support Expenditures

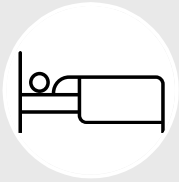
Statement of Acknowledgement



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.



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 **not** be supporting the related instruction costs … the Dual Training Grant **cannot** 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.

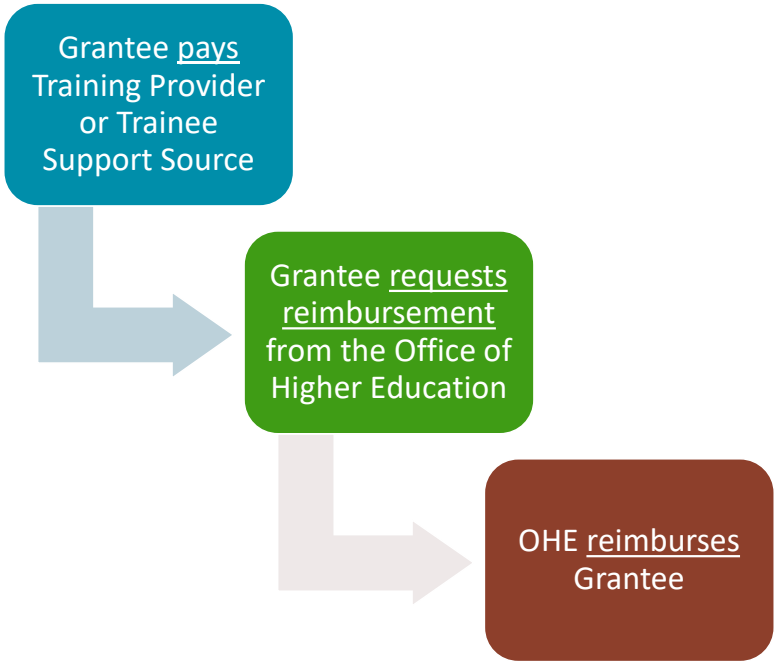
Expenditures Overview

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



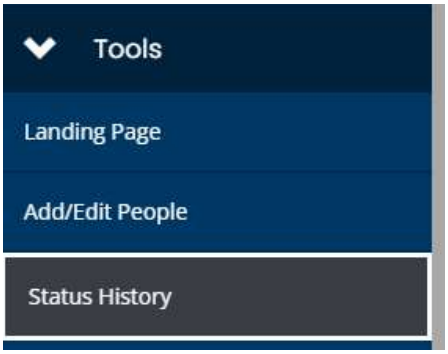
Reimbursement Request

Reimbursement Request



Reimbursement Request

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



Grantee's Responsibility

OHE'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

1. Must request reimbursement **no later than 45 days** after the end of a term or set of courses.
2. OHE Financial Services reviews and processes payments once per week.
3. 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.

Per State Policy on Grant Payments, reimbursement is the method for making grant payments. The Grantee's request for reimbursement must correspond to the approved grant budget. The State shall review each request for reimbursement against the approved grant budget, grant expenditures to-date and the latest grant progress report before approving payment. Grant payment shall not be made on grants with past due progress reports unless the State has given the Grantee a written extension.

The State will reimburse the Grantee only for eligible expenditures associated with the budget categories of: Related Instruction and Trainee Support. The State will not reimburse any grantee travel and subsistence expenses actually and necessarily incurred by the applicant as a result of applying for, being awarded a grant, or through the grant period.

The Grantee must submit reimbursement requests through the grants management system. The Grantee must submit reimbursement requests **no later than 45 days** after the end of a term. Reimbursement requests must include the following information and supporting documents:

Reimbursement Request

Training Cost **Match Requirement** for Large Employers: If annual gross revenue exceeded $25,000,000 in the previous calendar year (2025), 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
$2,000 Maximum grantee contribution
$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)
Spring Term: $4,800 (cost) – 1,062.50 (match) - $550.00 (trainee) = $3,187.50 (grant)
Total Year: $8,550 (cost) - **$2,000** (match) - $550 (trainee) = **$6,000** (grant)

Reimbursement Request

Documents to upload for Reimbursement Request

Related Instruction

- ❑ Detailed course schedule and bill for dual trainee (including book or material receipts)
- ❑ Invoice from training provider to grantee
- ❑ Proof of payment from grantee to training provider (preferably: copy of cashed check or bank statements)

❖ **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)
- ❑ Bank statement showing proof of payment
- ❑ Acknowledgement of receipt form signed by dual trainee and grantee

Important! The grantee must purchase and distribute 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.



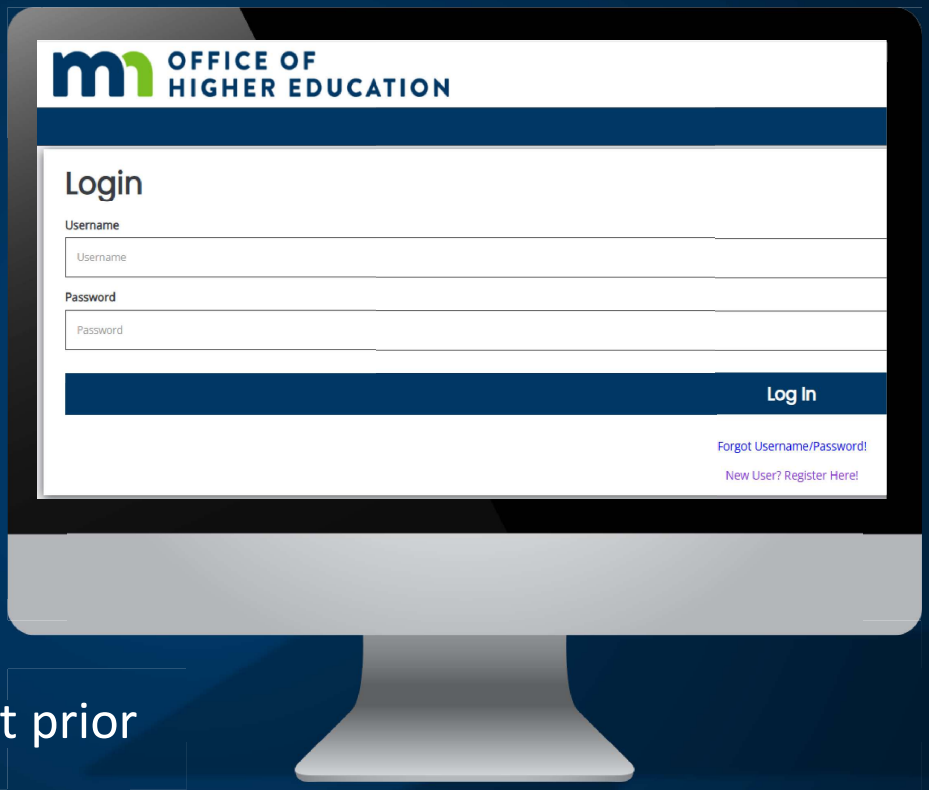
Reimbursement Request Demonstration

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

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

2026 Reimbursement Request Process will be available on October 1, 2026

DO NOT Initiate a reimbursement request prior October 1st

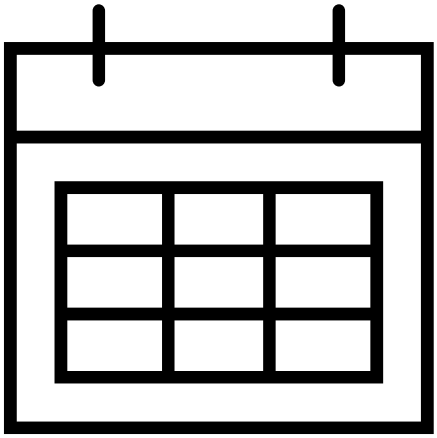


Reimbursement Request Demonstration

2026 Reimbursement Request Process will be available on October 1, 2026

When a grantee receives a check or electronic payment from the grant, the payment will be labeled with “DTG – 2026” 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.



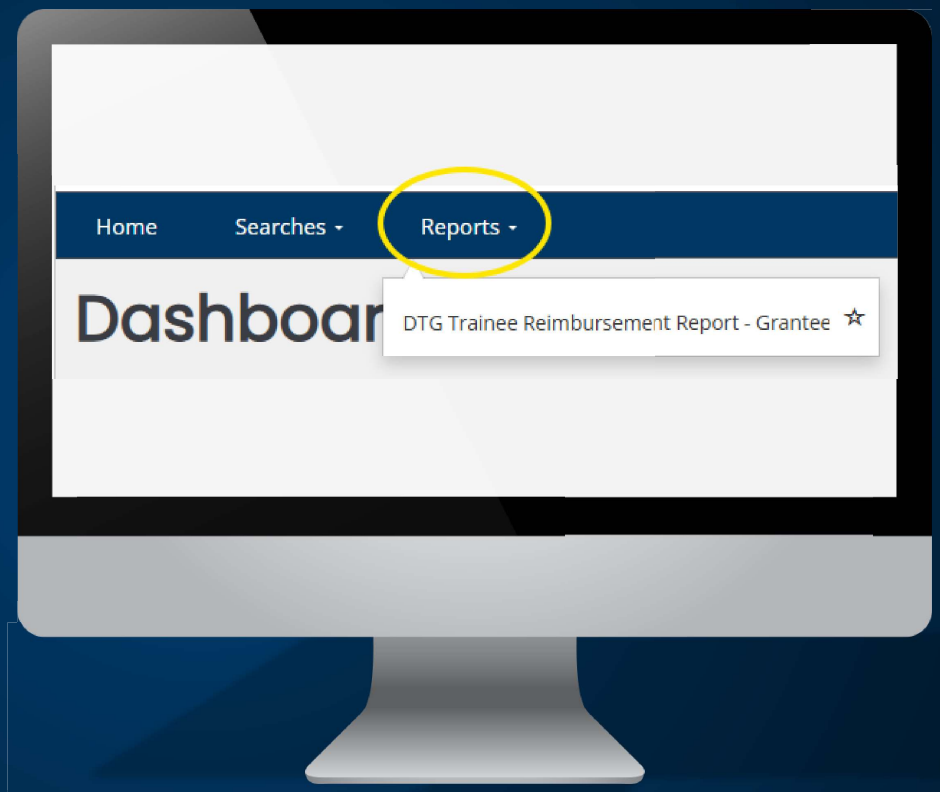
Miscellaneous

Dual Training Grant Reimbursement

NEW!

DTG Trainee Reimbursement Report - Grantee

Pull data from 2024, 2025, and 2026 DTG



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 and Grant Monitoring

Progress Reports

Progress Report due **February 26, 2027**
Final Progress Report due **September 30, 2027**

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

Grant Monitoring

October 2026 through April 2027

Communication

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



Upcoming Dates, Workshops & Events

Upcoming Dates: Dual Training Grant

Important Dates

- November 15, 2026: Start **Fall Term** Reimbursement
- January 29, 2027: **Fall Term** Reimbursement Request ***Due***
- February 26, 2027: Progress Report ***Due***
- March 15, 2026: Start **Spring Term** Reimbursement
- June 30, 2027: **Spring Term** Reimbursement Request ***Due***
- July 15, 2027: Start **Summer Term** Reimbursement
- August 31, 2027: Contract Expires
- September 30, 2027: **Summer Term** Reimbursement Request ***Due***
- September 30, 2027: Final Report and Work Plan & Budgets ***Due***
- October/November: Grant Period Evaluations & Closeout

Upcoming Workshops: Dual Training Grant

Workshops

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

December 3, 2026 (10 – 11am): **2026** DTG Reports & Next Term Prep Workshop

January 25, 2027 (1 – 3pm): **2027** DTG Request for Proposal Workshop

January 26, 2027 (9 – 10am): **2027** DTG Request for Proposal *Refresh* Workshop

May 3, 2027 (10 – Noon): **2027** DTG Mandatory Grantee Orientation

June 24, 2027 (10 – 11am): **2026** DTG Final Report & Closeout Workshop

Upcoming Events: MN Dual-Training Pipeline

Workforce Community Conversations:

- Sept. 22, 2026, from 8:30 to 10 a.m. at the Woodbury Area Chamber of Commerce. View the event flyer for more details. RSVP encouraged here.
- Sept. 23, 2026, from 8 to 9:30 a.m. at the Stearns County Public Works highway building, Waite Park. View the event flyer for more details. RSVP encouraged here.
- Sept. 24, 2026, from 3 to 4:30 p.m. at the Willmar Lakes Area Chamber of Commerce. View the event flyer for more details. RSVP encouraged here.
- Sept. 29, 2026, from 3:30 to 5 p.m. at the Blooming Prairie City Center Meeting Room. View the event flyer for more details. RSVP encouraged here.
- Oct. 1, 2026, from 8:30 to 10 a.m. at Anoka Technical College — Room 251. View the event flyer for more details. RSVP encouraged here.
- Oct. 6, 2026, from 8 a.m. to 9:30 a.m. at the Saint Louis County Public Works – Lake Vermillion Room. View the event flyer for more details. RSVP encouraged here.

Upcoming Events: MN Dual-Training Pipeline

Industry Forums:

- Nov. 12, 2026, from 9 to 10 a.m.: Child Care Fall Industry Forum
- Nov. 12, 2026, from 1 to 2 p.m.: Advanced Manufacturing Fall Industry Forum
- Nov. 17, 2026, from 9 to 10 a.m.: Health Care Services Fall Industry Forum
- Nov. 17, 2026, from 1 to 2 p.m.: Transportation Fall Industry Forum
- Nov. 18, 2026, from 9 to 10 a.m.: Information Technology Fall Industry Forum
- Nov. 18, 2026, from 1 to 2 p.m.: Agriculture Fall Industry Forum
- Nov. 19, 2026, from 9 to 10 a.m.: Legal Cannabis Fall Industry Forum



Thank You!

Please reach out to Grace & Jacquelynn with any reimbursement request questions.