MEMORANDUM

To: Executive Committee

From: Adrian Lopez, C.E.O.

Presented by   Jessica Villarreal, Director of Child Care

Date: **March 7, 2025**

Subject: **Child Care Quality Areas of Focus**

Summary: This is a briefing to the Child Care Committee on the Child Care Quality Areas of focus plans for FY 25, which will cover October 1, 2024 – September 30, 2025. Each FY boards are required to submit an annual plan to TWC describing how the board intends to expend the current fiscal year's CCQ funds. WSA allocates funding based on TWC guidelines and stakeholder feedback and discussions. WSA will continue to monitor and adjust as needed.

Analysis: Boards must designate all estimated expenditures using the following seven categories:

Federally Allowable uses for Child Care Quality Funds

1. **Training and Professional Development,** which includes costs associated with any training (not including infant- and toddler-specific training), professional development, and/or postsecondary education opportunities provided to childcare provider staff

- **CQF Activity: *Training and Professional Development,*** which includes any costs associated with activities that are specific to substitute pay/reimbursement to support childcare provider staff attending school or training during work hours

Note: Activities funded must be demonstrably responsive to childcare providers' specific needs as Validated by data collection and/or consultation with the local childcare committee or other representative childcare stakeholders.

2. **Texas Rising Star,** which includes any costs associated with Texas Rising Star recognition, maintenance, and mentor staff

- **CQF Activity: *Texas Rising Star,*** which includes any costs associated with activities specific

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to tiered monetary incentives for programs (Entry Level and certified programs) to purchase equipment, provide a wage or hiring bonus, or both.

- comprehensive curriculum support, which requires any curriculum purchased for a childcare provider to be accompanied by overarching training and support and be aligned with the local school district/charter if the provider is participating in a Prekindergarten partnership; and
- materials and supplies based on the provider's specific needs as validated by data collection and/or consultation with the local childcare committee or other representative childcare stakeholders (excluding playground equipment, shade structures, cameras or other security equipment, and smart boards).

3. **Infant and Toddler Activities**, which includes any costs associated with specifically addressing infant and toddler program establishment or expansion, infant- and toddler-specific professional development, early intervention partnerships, and infant and toddler materials
    - **CQF Activity: _Infant and Toddler Activities_,** which includes any costs associated with activities that are specific to: providing infant/toddler mental health consultations; and supply building (opening new classrooms to serve infants and toddlers by offering materials or a monetary stipend per slot).

4. **Health and Safety,** which includes any costs associated with assisting early learning programs in maintaining childcare licensing compliance or providing high-quality health and safety provisions that do not include activities specific to infants and toddlers.

5. **Evaluation,** which includes any costs associated with purchasing assessment tools that measure effective practices for child development, training staff to implement the tools, and/or conducting formal evaluation studies of quality efforts, which requires the submission of an evaluation report to TWC.

6. **National Accreditation Support,** which includes any costs associated with helping early learning programs obtain or maintain national accreditation (for example, fees and materials).
    - **CQF Activity: _National Accreditation_,** which includes any costs associated with activities specific to payment or reimbursement of initial application and renewal fees

7. **Other Allowable Activities,** which are limited to costs for the following:
    - Shared Services
    - Prekindergarten partnerships

- Childcare and early learning mental health supports (such as infant and early childhood mental health consultation or childcare staff wellness resources)

Note: Training activities that focus on mental health should be reported under "Training and Professional Development."

- Supply building activities, including:
- capacity expansion grants, stipends, or resources for existing providers to increase capacity (either total or for a target population, such as infants, children with disabilities, or children enrolled in the Child Care Services program); and
- wage support for childcare staff, such as recruitment and retention bonuses or wage supplements.

Note: Bonuses or stipends that are tied to new educational attainment must be reported under "Training and Professional Development."

- **CQF Activity: _Other Allowable Activities_**, which includes any costs associated with activities specific to:
- wage supplements or stipends for childcare workers; and
- supply building incentives or materials for new or current providers who offer nontraditional hour childcare or serve children in underserved areas (such as childcare deserts), and/or vulnerable populations, such as infants and toddlers, children with disabilities, and English-language learners.

Fiscal Impact:

Infant & Toddler (including professional development) $900,000	
Infant/Toddler Curriculum, Indoor & Outdoor and Furniture	Q2 & Q3
Infant/Toddler Specific Training	Q1
Professional Development $550,000	
Training for Children with Differing Abilities	Q2
Local and State Conferences	Q1
Teacher & Director Conference	Q3 & Q4
Curriculum Training and Other Training	Q1 & Q4
Texas Rising Star Quality Improvement (except PD) $3,835,979	
TRS Maintenance Incentive	Q2
Curriculum	Q2
TRS Personnel	Q1-Q4
Indoor and Outdoor Material	Q3 & Q4
TRS Conference Reimbursement	Q4

CLASS Training for Mentors	Q3
Supporting Health & Safety Standards $50,000	
First Aid/CPR Training Reimbursement	Q1
Evaluation & Assessment $70,000	
ASQ SE & ASQ 3	Q1
ECERS & ITERS	Q3
Supporting National Accreditation $19,145	
Accreditation Fees	Q1
Other Activities $3,000,000	
TRS Retention Bonus	Q1
CCS Wage Supplement	Q4
Newly Certified Wage Supplement	Q1

Recommendation: The analysis of the TRS Needs Assessment Survey will continue to provide insight and guidance on the plans for investments being made to support the Child Care Quality (CCQ) programs for FY25. WSA will monitor the plan and adjust should priorities change.

Next Steps:

- WSA will continue to meet and collaborate with ECE organizations & stakeholders to maintain awareness of the needs of the ECE community.
- Quality funding and initiatives will continue to be allocated according to TWC guidelines.
- WSA is sharing the proposed FY25 CCQ expenditure plan with the Early Care Committee meeting & with the board.

MEMORANDUM

To:	Executive Committee
From:	Adrian Lopez, CEO
Presented By:	Jessica Villarreal, Director of Child Care
Date:	March 7, 2025
Subject:	Texas Workforce Commission's Child Care Connection (TX3C) System

Summary: This is a briefing to provide an update on the new Child Care platform, Texas Child Care Connection (TX3C).

Analysis: The Texas Workforce Commission's new case management system for Child Care Services – the Texas Child Care Connection (TX3C), went live January 13, 2025. Initially Texas Workforce Commission planned to launch this platform October 1, 2023, however due to various issues that continued to arise, the launch was scheduled to launch and postponed, three additional times.

- July 1, 2024, was postponed until September 1, 2024
- September 1, 2024, was postponed until December 9, 2024.
- December 9, 2024, was postponed until January 13, 2025.

With the launch of the new system:

- Provider payments moved from a reimbursement model to an advance payment approach.
- A new statewide parent share of cost methodology
- Parent Share of Cost is paid on a weekly basis
- Parents can check in their children via a tablet at the provider location or on their smart phones
- One statewide online application for all parents
- Staff are participating in daily 2-hour post-deployment meetings for TX3C.

Challenges Include:

- Production environment is different from UAT (testing) environment
- Service Now tickets are slow to get answered
- Many items brought to TWC's attention prior to launch are still not addressed
- It was reported via the Child Care Network that other boards are experiencing many issues. Post-Deployment requirements are unclear

The new system is hindering productivity and impacting the efficiency of staff. These issues may subsequently affect Child Care staff in meeting performance due to the delays in processing key eligibility determinations. Specifically, the following eligibility-related deadlines are being affected:

- Meeting initial job search eligibility end date (EED)
- Meeting end of job search eligibility end date (EED)
- Intake 20-day eligibility requirements and
- Recertification eligibility end date (EED)

Fiscal Impact: N/A

Recommendation: N/A

Next Steps: To ensure a seamless transition to the new platform, Board and Contractor staff will continue participating in the training sessions and meetings provided. Board staff will maintain active oversight and facilitate communication between Contractors and TWC, addressing inquiries and providing ongoing support to mitigate any potential service disruptions or impact on daily operations.

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MEMORANDUM

To:	Executive Committee
From:	Adrian Lopez, CEO
Presented by:	Jessica Villarreal, Director of Child Care
Date:	March 7, 2025
Subject:	Co-ops for Childcare

Summary:
This memo provides an update on the progress of developing co-op opportunities in rural areas. Work in this area has begun, though it is currently in the initial stages as we focus on understanding the specific needs of our rural communities and providers.

To this end, the following actions have been taken:
- The Childcare team has initiated research into the structural components of successful co-op models.
- The Business Coach has been tasked with developing a survey schedule to assess the needs of rural childcare providers. This schedule is currently being developed and will be shared when available.
- We are reviewing informational articles and materials to learn from existing successful co-op models and identify potential resources and support avenues.
- We are engaged in discussions with our Alamo Quality Pathway partners to ensure alignment of efforts and explore potential collaboration opportunities.
- We are actively researching existing community initiatives, meetings, and relevant activities to identify potential partnership opportunities for Workforce staff and determine how we can effectively contribute to ongoing efforts.
- The tentative timeline is outlined below.

Phase 1 Exploratory	2-6 months
Idea Development & Initial Group Formation: Identifying the need for a co-op and gathering a core group of interested individuals	4- 8 weeks
Research & Study: Assessing the sustainability of the co-op by analyzing	8 – 24 weeks

market demand, competition, and potential financial performance **Develop a Business Plan**: Creating a detailed roadmap for the co-op, including its mission, goals, structure, operations, and financial projections	
Phase 2 Organizational Structure	**6-12 months**
Choose a Structure: Determining the appropriate legal framework for the co-op (e.g., consumer co-op, worker co-op, producer co-op) and registering it with the relevant authorities if needed.	4- 8 weeks
Develop Agreements: Creating documents that outline the co-op's rules, rights and responsibilities, and decision-making processes **Secure Funding:** Exploring funding options, such as member investments, loans, grants, or other.	8 - 24 weeks
Phase 3 Implementation & Launch	**12-18 months**
Set up Operations: Establishing the co-op's physical space, equipment, technology, and other necessary infrastructure	8 – 24 weeks
Marketing and Outreach: Promoting the co-op to potential members and customers.	ongoing

Total Estimated Time: 18 months:

Factors that can affect the timeline:
- Complexity of the co-op: A small, simple co-op will generally take less time to set up than a large, complex one.
- Staffing: staffing to support this request and any staff turnover.
- Availability of resources: Access to funding, expertise, and support can significantly impact the timeline.
- Level of member involvement: Active and engaged members may help to expedite the process.
- Legal and regulatory requirements: Navigating legal and regulatory hurdles may cause delays.

Alternatives: N/A
Fiscal Impact: N/A
Recommendation: N/A: This is an update only

Next Steps: This is an ongoing process, and we will continue to provide updates as our understanding of community needs deepens and our plans become more concrete.

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MEMORANDUM

To: Executive Committee

From: Adrian Lopez, CEO

Presented By: Jessica Villarreal, Director of Child Care

Date: March 7, 2025

Subject: Targeted Occupation - Early Child Care Workers

Summary: This memo serves to formally notify the Early Care and Education Committee of a request made by Committee Chair, Ms. Ana DeHoyos O'Connor, during the Executive Committee Meeting held on November 15, 2024.

Analysis: During a discussion concerning targeted occupations within the local plan, Chairwoman. O'Connor requested that Early Child Care workers be added as a targeted population. She cited a significant shortage of workers in this field and emphasized the critical need for support within this sector. Following the chairwoman's request, the Child Care department has been actively working to gather supporting data and build a compelling argument for the inclusion of Early Child Care workers as a targeted occupation.

This work has included:
- Collaboration with the Workforce Solutions Alamo (WSA) data team to analyze relevant workforce data.
- Outreach to other boards and organizations to gather information on best practices and successful strategies related to supporting Early Child Care workers

The goal of this research is to develop a full justification for prioritizing Early Child Care workers within the local plan.

Fiscal Impact: N/A
Recommendation: N/A

Next Steps: We will continue to keep the Early Care and Education Committee updated on our progress and will share additional information as it becomes available.
We also welcome any feedback or insights the committee may have on this important topic. Please do not hesitate to contact us with any questions or comments.

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MEMORANDUM

To:	Executive Committee
From:	Adrian Lopez, CEO
Presented By:	Kristen Rodriguez – Interim Director of Procurement and Contracts Management
Date:	March 7, 2025
Subject:	**Bandera Update**

Summary: On November 22, 2024, the Board of Directors of Workforce Solutions Alamo awarded a contract to Bandera County Committee on Aging, Inc., a Texas non-profit corporation d/b/a Silver Sage for the lease of a facility located at 803 Buck Creek, Bandera, TX. The estimated annual rent for the 480 square foot facility, including maintenance, taxes, and insurance (NNN), is $28,800. The contract allows for an annual rent escalation percentage not to exceed 5%. *This initiative aligns with Goal 2 of the Texas Talent and Economic Growth Strategic Plan, which focuses on Service Optimizers*.

Construction Updates:

- Construction is 100% complete
- Ongoing Task:
    - Furniture scheduled to be delivered January 29, 2025
    - IT is assessing the network
    - Signage is currently being procured, 4-6 weeks out
- Opening scheduled for February 2025.
- Grand Opening projected for mid-March 2025

Fiscal Impact: The estimated base rent is $2,400 monthly. The annual estimated rent amount is $28,800 for 480 SQFT, with an annual rent escalation not exceeding 5%. The anticipated initial term of the lease will be for 3 years with up to two (2) 3-year options to renew that will be specified in the agreement, not to exceed nine (9) years inclusive of all renewals.

Next Steps: Board staff will continue to coordinate internally and externally for opening.

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MEMORANDUM

To:	Executive Committee
From:	Adrian Lopez, CEO
Presented By:	Kristen Rodriguez, Interim Director of Procurement & Contracts
Date:	March 7, 2025
Subject:	O'Connor Update

Summary: On August 18, 2023, the Board of Directors of Workforce Solutions Alamo awarded a contract to R/E Business Center, LLC. for the lease of a facility located at 11711 IH 35N, San Antonio, Texas. The estimated annual rent for the 23,880 square foot facility, including maintenance, taxes, and insurance (NNN), is $740,280. The contract allows for an annual rent escalation percentage not to exceed 5% and a Tenant Improvement (TI) allowance not exceeding $1,910,400. This initiative aligns with Goal 2 of the Texas Talent and Economic Growth Strategic Plan, which focuses on Service Optimizers.

Contract Negotiations – due to landlord delays
- **New Commencement Date:** November 15, 2024
- Installation of new bathroom partitions and the replacement of toilets and urinals
- Window tinting to conceal exposed ductwork and wiring above the entrance

Construction Update:
- Construction is now 99% complete.
- Ongoing tasks include:
    - Installation of new bathroom partitions, scheduled to begin on January 17th and conclude by January 31st.
    - Fiber network installation, scheduled for completion by February 6, 2025
    - Final cleaning
- VRS/C2 staff are scheduled to move in on January 22, 2025.

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- A soft opening is projected for early February 2025
- Grand Opening is projected for November 2025

Fiscal Impact: The estimated base rent for the facility is $61,690 monthly. The annual estimated rent amount is $740,280 for 23,880 SQFT, with an annual rent escalation not exceeding 5%. It also includes a Tenant Improvement (TI) allowance not exceeding $1,910,400.

Next Steps: Board staff will continue to coordinate internally and externally grand opening.

MEMORANDUM

To:	Executive Committee
From:	Adrian Lopez, CEO
Presented By:	Kristen Rodriguez – Interim Director of Procurement and Contracts Management
Date:	March 7, 2025
Subject:	**Business Services Strategy and Industry Sector Partnership RFP**

Summary: Discussion: Workforce Solutions Alamo (WSA) – Board Staff is presenting the scope of work proposed for the upcoming Request for Proposal (RFP) to support the Workforce Solution Alamo (WSA) in meeting its strategic workforce development goals. The tasks outlined below will contribute directly to improving sector-based partnerships, optimizing the delivery of business services, and ensuring measurable impact in alignment with workforce engagement strategies. The objective is to enhance WSA's capacity to meet the evolving needs of employers, align with industry's best practices, and strengthen relationships with key partners.

Scope of Work:

1. **Support for WSA CEO Related to WSA Board Officer Goals**
   - **Work Plan Development**: The creation of a comprehensive work plan will support the strategic engagement of both WSA Board staff and contractors. This engagement will focus on developing partnerships that address workforce needs across multiple sectors, ensuring that stakeholders are aligned and mobilized for action.
   - **Industry Sector Strategies**: By reviewing and validating existing sector charters and strategies, we ensure that each partnership is aligned with the current business and workforce demands. This provides clarity and direction to the workforce's development efforts, ensuring that each sector's needs are being met in a meaningful and impactful way.

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- **Quarterly Reporting Templates**: The development of reporting templates will enable WSA to track progress against defined goals, providing transparency and accountability for each sector partnership. Regular reporting ensures that progress is monitored and enables the adjustment of strategies to stay aligned with workforce engagement goals.
- **Partnership Goal Alignment**: Defining clear and measurable goals for each partnership ensures that the initiatives are meaningful and impactful for employers. This fosters a results-oriented approach to workforce engagement, where outcomes are directly tied to business needs and talent development.
- **New Sector Partnership Development**: Developing new sector partnerships as needed will enable WSA to expand its reach and impact, engaging with sectors that require tailored workforce solutions and facilitating further alignment with industry-driven workforce engagement.

2. **Advising CEO and COO on Organizing Board and Career Center Contractor Business Services**
   - **Roles and Responsibilities Definition**: Clarifying roles and responsibilities within the WSA Board and Career Center contractors will promote efficiency and effective service delivery. Clear roles also ensure that each entity involved in workforce engagement understands their contribution to meeting employer needs.
   - **Best Practices Research:** Conducting research on talent sourcing and management best practices, particularly in partnership with local Chambers of Commerce, will enable WSA to adopt strategies that are proven to drive success in the private sector. This aligns with our goal of improving workforce engagement by leveraging insights from those with expertise in managing talent pipelines.
   - **Partnership Proposal Development:** Developing partnership proposals for collaboration with local Chambers of Commerce will provide an actionable plan to strengthen relationships with key regional stakeholders. This collaboration will support the workforce engagement strategy by aligning workforce development efforts with the needs of local employers and businesses

Supporting Texas Talent and Economic Growth – Goal 2, Service Optimizers.

These efforts will help ensure that WSA continues to play a leading role in meeting the workforce development challenges faced by local industries, while driving measurable and impactful outcomes for employers.

Next Steps: Once SOW is reviewed and approved procurement department will
1. Develop a Solicitation Timeline
2. Publish the RFP on Bonfire and ESBD
3. Conduct pre bid conference with interested vendors
4. Evaluation of proposal(s)
5. Bring recommendation to the Audit and Finance committee if need board approval
6. Award contract

MEMORANDUM

To:	Executive Committee
From:	Adrian Lopez, CEO
Presented By:	Kristen Rodriguez – Interim Director of Procurement and Contracts Management
Date:	March 7, 2025
Subject:	RFP's for Business Services

Summary: Discussion: Workforce Solutions Alamo (WSA) – Board Staff is presenting the scope of work proposed for the upcoming Request for Proposal (RFP) to support the Workforce Solution Alamo (WSA) in meeting its strategic workforce development goals. The tasks outlined below will contribute directly to improving sector-based partnerships, optimizing the delivery of business services, and ensuring measurable impact in alignment with workforce engagement strategies. The objective is to enhance WSA's capacity to meet the evolving needs of employers, align with industry's best practices, and strengthen relationships with key partners.

Scope of Work:

1. **Support for WSA CEO Related to WSA Board Officer Goals**
   o **Work Plan Development**: The creation of a comprehensive work plan will support the strategic engagement of both WSA Board staff and contractors. This engagement will focus on developing partnerships that address workforce needs across multiple sectors, ensuring that stakeholders are aligned and mobilized for action.
   o **Industry Sector Strategies**: By reviewing and validating existing sector charters and strategies, we ensure that each partnership is aligned with the current business and workforce demands. This provides clarity and direction to the workforce's development efforts, ensuring that each sector's needs are being met in a meaningful and impactful way.

- **Quarterly Reporting Templates**: The development of reporting templates will enable WSA to track progress against defined goals, providing transparency and accountability for each sector partnership. Regular reporting ensures that progress is monitored and enables the adjustment of strategies to stay aligned with workforce engagement goals.
- **Partnership Goal Alignment**: Defining clear and measurable goals for each partnership ensures that the initiatives are meaningful and impactful for employers. This fosters a results-oriented approach to workforce engagement, where outcomes are directly tied to business needs and talent development.
- **New Sector Partnership Development**: Developing new sector partnerships as needed will enable WSA to expand its reach and impact, engaging with sectors that require tailored workforce solutions and facilitating further alignment with industry-driven workforce engagement.

2. **Advising CEO and COO on Organizing Board and Career Center Contractor Business Services**
   - **Roles and Responsibilities Definition**: Clarifying roles and responsibilities within the WSA Board and Career Center contractors will promote efficiency and effective service delivery. Clear roles also ensure that each entity involved in workforce engagement understands their contribution to meeting employer needs.
   - **Best Practices Research:** Conducting research on talent sourcing and management best practices, particularly in partnership with local Chambers of Commerce, will enable WSA to adopt strategies that are proven to drive success in the private sector. This aligns with our goal of improving workforce engagement by leveraging insights from those with expertise in managing talent pipelines.
   - **Partnership Proposal Development:** Developing partnership proposals for collaboration with local Chambers of Commerce will provide an actionable plan to strengthen relationships with key regional stakeholders. This collaboration will support the workforce engagement strategy by aligning workforce development efforts with the needs of local employers and businesses

These efforts will help ensure that WSA continues to play a leading role in meeting the workforce development challenges faced by local industries, while driving measurable and impactful outcomes for employers.

Next Steps: Once SOW is reviewed and approved procurement department will
1. Develop a Solicitation Timeline
2. Publish the RFP on Bonfire and ESBD
3. Conduct pre bid conference with interested vendors
4. Evaluation of proposal(s)
5. Bring recommendation to the Audit and Finance committee if need board approval
6. Award contract

MEMORANDUM

To:	Executive Committee
From:	Adrian Lopez, CEO
Presented By:	Rebecca Espino-Balencia, Director, Ready to Work
Date:	March 7, 2025
Subject:	**Business Services**

Summary: Business Services Solution Team Scorecard and Upcoming Events. This item provides an update on the progress of the Business Solutions Services to the Strategic Committee of the WSA Board of Directors. Data as of December 4, 2024. The Business Services Team has developed a comprehensive calendar for the year 2025. This calendar is designed to provide employers and job seekers with specific dates of availability, thereby establishing a structured rhythm for interactions and engagements. The Business Services Team is presently engaged in discussions regarding the overall impact of our initiatives and the strategies needed to enhance and leverage employer partnerships across the Alamo Region. We are committed to fostering these relationships to drive mutual growth and success.

Analysis: Program Scorecard: Includes the 6 sectors industries; Aerospace, Manufacturing, Healthcare, IT/Cybersecurity, Education and Construction & Trades. The definition for each data point is included in the figure below.

Component	Description
Enrolled in Training	Customers enrolled in Apprenticeships, OJT's, or ITA's
Completed Training	Customers who successfully completed a Training service
Enrolled in Work-Based Learning	Customers enrolled in Work Experience or Subsidized Employment
Completed Work-Based Learning	Customers who successfully completed Work-Based Learning Service
Placement	Customers who were placed in Employment

Fiscal Impact: Workforce Solutions Alamo has effectively utilized formula-funded program dollars to establish talent pipelines within the Alamo Region. By strategically leveraging data and adhering to local plans, we are committed to addressing the specific needs of our community and employers.

Recommendation: WSA will continue exploring data and outcomes to understand the intersections between program investments, including childcare, with eligible job seekers, training completers, and employment placements. The Business Solutions team will continue to strategically meet to discuss opportunities to enhance Training Provider engagement and outcomes that align with the Local Plan developed and create quality talent pipelines for Employer Partners within the Alamo Region. The Business Solutions team and Marketing Team have also identified telling our story and promoting possible outcomes as key. Story telling will be a continued focus as part of the 2025 strategy.

Next Steps: We will continue to examine performance score cards and understand the links between supply and demand.

MEMORANDUM

To: Executive Committee

From: Adrian Lopez, CEO

Presented by: Jessica Villarreal, Director of Child Care

Date: March 7, 2025

Subject: Business Services Update

Summary: Texas Rising Star Business Coach Updates. Our TRS Business Coach continues to provide vital support to Early Learning programs, focusing on resource connection, business model analysis, and addressing staffing shortages. This support extends to TRS mentors assisting centers navigating the certification process. Notably, this coaching has influenced several programs to remain in the CCS and TRS programs. The coach has also been actively working on expanding resources and support through partnerships and training.

Analysis: Fiscal Impact Snapshot: (Data Collected Week of Jan. 13-17)

Increased Revenue:

Rural County Area:

- Two centers in the Rural County Area demonstrated the potential for significant revenue increases through participation in a Food Program. Analysis suggests a potential monthly revenue boost of $8,240.00 for the combined centers.

- A third center requires one additional staff member to accommodate the current waitlist of five children. This expansion has the potential to generate an additional $18,000 in monthly revenue.

Bexar County Expansion:

- One center in Bexar County is actively expanding by adding a new classroom to accommodate 30 additional children. This expansion is projected to generate an additional $22,800 in monthly revenue, create two new jobs, and contribute to staff retention. Furthermore, the center is exploring the possibility of reinvesting profits to purchase land in a designated desert area, facilitating future expansion of services and potentially generating an additional $456,000 in annual revenue and creating approximately six new jobs.

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Cost Reduction Strategies:

- Another Bexar County Center is implementing cost-reduction strategies, including collaborative efforts with new church owners to negotiate reduced or eliminate rent. This proactive approach has the potential to continue generating over $800,000 in annual earnings and contribute to the center's long-term sustainability. Measurable Outcomes: In working with the 5 childcare centers.

- Total potential earnings and estimated annual growth $1,388,480.00.

Key Highlights:

- **Program Reach:** 121 Early Learning programs have partnered with the business coach (51 Rural, 70 Bexar).

- **Resource Dissemination:** Weekly business training updates and resources are distributed to an average of 575 childcare center directors.

- **Funding Exploration:** Contact initiated with the Lift Fund Representative for potential 2025 funding opportunities.

- **Staff Expansion:** Recruitment and interviews are underway for a second Business Coach.

- **Professional Development:** The Business Coach completed Civitas Business Financial Coach Certification training (currently working on assessment).

- **Key Partnerships and Initiatives:**
  - Facilitating a partnership between UTSA-SBDC and childcare centers for business planning, marketing, and expansion resources.
  - Attending interagency meetings in rural areas to gather and distribute resources.
  - Collaborating with COSA Economic Development center on Bexar County grant opportunities.
  - Collaborating with Workforce Solutions Career Center's Child Care Business Liaison for staff recruitment.
  - Developing procedures and protocols for a Childcare Directors Collaborative (Advisor and Advisee).
  - Setting SMART goals with childcare centers to prioritize needs like enrollment, marketing, and expansion, utilizing template below.

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SMART GOAL – Action Plan WORKSHEET

| Childcare Center Name: | | Director Name: | |

| Date Started: | | Date of Completion: | |

Topic:				
Specific:				
Measurable:				
Attainable/Action Steps:				
Checkpoints (Dates)				
Initial CCD / BC				
Relevant:				
Time Bound- Desired Result:				
Actual Result:				
Estimated Fiscal Impact: Increased Revenue: Profitability Job Creation/ Retention Other:				

Started Director Signature: _____   Business Coach Signature: _____

Completed Director Signature: _____   Business Coach Signature: _____

11/12/2024 PA Revised   FORM 4

Alternatives: N/A

Fiscal Impact: N/A

Recommendation: N/A: This is an update only

Next Steps: The Texas Rising Star Business Coach will maintain support of Early Learning Centers and further develop expertise in relevant resources to enhance the assistance provided to these centers.

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MEMORANDUM

To:	Executive Committee
From:	Adrian Lopez, CEO
Presented by:	Victoria Rodriguez, Director of Workforce Services
Date:	March 7, 2025
Subject:	**DOL Grant**

Summary:

Workforce Solutions Alamo (WSA) was recently awarded a $2,000,000 grant from the U.S. Department of Labor (DOL) for the San Antonio Infrastructure Academy. The five-year grant, awarded on October 1, 2024, is designed to address gaps in the construction industry by providing training, upskilling, and assessments to support the region's growing infrastructure and renewable energy projects.

Analysis:

The Infrastructure Academy aims to address critical workforce needs in construction and infrastructure by leveraging this DOL grant to enhance training and career pathways.

Key Components:

- **Performance Goals:**
    - WSA is contracted to serve 250 participants over five years.
    - Participants will receive targeted training, skill development, and assessments to prepare them for careers in construction and renewable energy sectors.
- **Program Objectives:**
    - Fill existing workforce gaps in the construction industry.
    - Support infrastructure expansion in the Alamo region.
    - Contribute to renewable energy initiatives by developing a skilled workforce.

Program Benefits:

- This grant provides WSA with additional resources to expand career pathways in construction.
- It directly supports the development of critical skills needed for infrastructure and renewable energy projects.

- Employers benefit from a pipeline of skilled workers, while participants gain access to high-wage, sustainable career opportunities.

Alternatives:

At this time, no alternative approaches are being considered, as this grant fully aligns with WSA's mission and regional workforce development goals.

Fiscal Impact:

The $2,000,000 grant increases WSA's budget and allows for significant investment in workforce development over the five-year period.

Projected ROI:

- The program will train and place participants into 34 high-demand careers in construction with an average wage ranging from $34,000-$117,000 a year, significantly enhancing economic outcomes for individuals and the region.

Recommendation:

This project includes a one-year planning period from October 2024 to July 2025. During this time, WSA will work closely with the DOL to develop a comprehensive employer and participant engagement plan. This planning phase will ensure the program's success by aligning grant objectives with employer needs and regional workforce demands.

The Board will receive regular updates from WSA on program progress, challenges, and outcomes.

Next Steps:

1. **Planning Phase (October 2024 - June 2025):**
   a. Collaborate with DOL for technical guidance to develop a detailed implementation plan.
   b. Conduct a needs assessment to identify skills gaps in construction and renewable energy.
   c. Establish partnerships with local employers, training providers, and community organizations.
2. **Employer Engagement:**
   a. Garner interest and commitment from regional employers to participate in the program.
   b. Align employer requirements with training programs to ensure participants are job-ready.
3. **Resource Alignment:**
   a. Review and integrate WSA's current resources and services to meet the grant's performance goals.
   b. Identify additional resources or support systems needed to ensure program success.
4. **Marketing and Outreach:**
   a. Launch a campaign to recruit program participants, focusing on underserved and underrepresented populations.
   b. Highlight the benefits of the program, including high wages and career stability, to attract interest.
5. **Regular Updates:**
   a. Provide quarterly updates to WSA committees and the Board of Directors on progress, key milestones, and any necessary adjustments.

This grant represents a significant opportunity for WSA to address workforce challenges in construction and renewable energy while driving economic growth in the Alamo region.

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MEMORANDUM

To: Executive Committee

From: Adrian Lopez, CEO

Presented by: Victoria Rodriguez, Director of Workforce Services

Date: March 7, 2025

Subject: **TX FAME**

Summary: Workforce Solutions Alamo (WSA) now serves as the TX FAME Hub organization, integrating the FAME into its current programs and services. Currently the Youth Service Delivery Model forms the foundation for this innovative integration of services as TX FAME aligns with the pillars of engagement, exploration, and experience. TX FAME provides a pathway for youth to enter manufacturing careers at an accelerated pace. The collaboration between TX FAME and WSA leverages WSA's existing resources and services to create a symbiotic relationship that enhances client success. The primary goal of the youth service delivery model is to offer accessible career opportunities for youth by utilizing a network of partners and resources.

Analysis: TX FAME is focused on developing a skilled manufacturing labor pipeline to address the increasing demand for talent in the sector. Recruitment efforts are employer-driven, ensuring the selection of candidates with the desired qualities and skills. Employers collaborate with each other and local school districts to establish a talent pipeline, with training provided through local community colleges. Upon completion of their training, FAME participants earn an Associate's Degree in Applied Science and Advanced Manufacturing Technology, along with two years of work experience. The shared goals of TX FAME and WSA have resulted in a groundbreaking partnership. After evaluating its resources, WSA has identified TX FAME as a primary focus of its youth service delivery model. The model will be used to recruit and guide participants through five key stages:

- **Exposure:** Introducing and promoting career awareness in manufacturing. Activities such as factory tours, career fairs, and interactive workshops aim to spark youth interest and dispel misconceptions about the manufacturing industry.
- **Engagement:** Facilitating employer engagement with students through mentorship programs, guest lectures, and career exploration events. These opportunities help students gain insights into the industry and build valuable networks.
- **Exploration:** Providing career exploration opportunities through hands-on projects and simulation activities. These experiences help students identify their interests and guide them toward suitable career paths.

- **Experience:** Assisting youth with internships, apprenticeships, and applied learning opportunities. By working directly with employers, students gain practical experience and develop essential workforce skills, ensuring a smooth transition from education to employment.
- **Empowerment:** Helping youth realize their potential in advanced manufacturing pathways. This stage focuses on equipping students with the skills and confidence needed to succeed in the industry. The TX FAME program also reduces financial barriers, often enabling students to graduate debt-free.

Alternatives: Other youth career pathways and workforce programs may be evaluated for integration into WSA's service delivery model, though TX FAME's proven success in developing skilled manufacturing talent positions it as a key focus.

Fiscal Impact: The partnership will require an allocation of resources to support recruitment, training, and program administration. However, the long-term benefits of a skilled workforce and reduced unemployment rates outweigh initial costs.

Recommendation: Endorse the integration of TX FAME into WSA's Youth Service Delivery Model as a critical strategy for addressing the need for skilled manufacturing labor and supporting youth career development.

Next Steps:

1. Finalize the implementation plan for incorporating TX FAME into WSA's service delivery model.
2. Develop a timeline and milestones for recruitment and program rollout.
3. Establish communication channels between employers, school districts, and community colleges.
4. Train WSA staff on the TX FAME model and youth engagement strategies.
5. Launch a promotional campaign to raise awareness of the program among youth and stakeholders.

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MEMORANDUM

To:	Executive Committee
From:	Adrian Lopez, CEO
Presented by:	Victoria Rodriguez, Director of Workforce Services
Date:	March 7, 2025
Subject:	**Mobile Unit Schedule**

Summary: Starting in February, Workforce Solutions Alamo (WSA) will deploy the Workforce One Mobile Unit to serve our 13-county area. This initiative will recognize the 55 employers who participated in the 2024 Summer Earn and Learn (SEAL) program while also supporting Career Centers and engaging with local communities. Additionally, the mobile unit will participate in key community events to provide employment resources, career exploration, and workforce development services.

Analysis:
The mobile unit will travel across the region to recognize SEAL employers and retrieve their commitment to participate in 2025. Below is the scheduled itinerary:
- **February 3rd** – Guadalupe County
- **February 5th** – Karnes and Wilson Counties
- **February 6th** – Atascosa County
- **February 10th** – Frio and Medina Counties
- **February 12th** – Bexar County (Datapoint Career Center)
- **February 13th** – Bexar County (East Houston Career Center)
- **February 17th** – Bexar County (South Flores Career Center)
- **February 19th** – Bexar County (Port SA Career Center)
- **February 26th** – Bexar County (San Antonio Food Bank Satellite Office)
- **February 27th** – Kerr and Bandera Counties
- **February 28th** – Kendall County
- **March 3rd** – Comal County

The Workforce One Mobile Unit is also scheduled for the following community events:
- **February 18th:** West Avenue Compassion – Employment consultation and assistance.
- **February 20th:** TX FAME Open House – Workforce development and employer engagement.
- **February 27th:** Harlandale ISD – Career Exploration event for students.
- **March 1st:** 5th Annual Trades Discovery Day- San Antonio youth and community invited to explore the trades industry.

- **April 2nd:** Joint Base San Antonio (JBSA) Direct Hire Event – On-site hiring opportunities for military personnel and families.

Key Objectives:
- **Recognize Employers:** Celebrate the contributions of the 55 SEAL program employers who supported summer work-based learning experiences.
- **Expand Outreach:** Use the Workforce One Mobile Unit to bring services directly to underserved areas across the 13-county region.
- **Support Career Centers:** Provide additional resources and engagement opportunities at local WSA Career Centers.
- **Engage Communities:** Partner with local organizations and schools to promote career readiness, training opportunities, and workforce development.

This outreach effort will:
- Strengthen relationships with SEAL employers and recognize their impact on workforce development.
- Increase accessibility to employment services for rural and underserved populations.
- Foster partnerships with community organizations, schools, and employers to promote workforce readiness.
- Create opportunities for direct engagement with job seekers, students, and community members.

Alternatives: No alternatives at this time.

Fiscal Impact: There is not a fiscal impact.

Recommendation: WSA staff recommendation is to follow the proposed mobile unit schedule to enhance partnerships and collaborations with employers in future projects.

Next Steps:
1. **Communication:**
   - Notify SEAL employers about recognition efforts and coordinate presentations or events during site visits.
   - Promote the mobile unit schedule through social media, newsletters, and local community channels.
2. **Coordination:**
   - Finalize logistics for the mobile unit's deployment, including staffing and resources for each stop.
   - Confirm arrangements with community partners for reserved events and ensure alignment with event goals.
3. **Monitoring and Feedback:**
   - Track participation and engagement at each stop to evaluate the impact of mobile unit visits.
   - Gather feedback from employers, job seekers, and community organizations to inform future outreach efforts.

The Workforce One Mobile Unit initiative demonstrates WSA's commitment to increasing accessibility to services and celebrating partnerships that advance workforce development throughout our region.

MEMORANDUM

To:	Executive Committee
From:	Adrian Lopez, CEO
Presented by:	Victoria Rodriguez, Director of Workforce Services
Date:	March 7, 2025
Subject:	**Update on Day Laborer Site Locations**

Summary: In October, Committee Chair Eric Copper raised questions about the extent of services provided to individuals engaged in the day labor trade and what Workforce Solutions Alamo (WSA) could do to better serve this population. Many day laborers face significant barriers, such as a lack of citizenship status, identification, or work authorization, making it difficult to access employment services. This memo provides an analysis of current policies, available resources, and potential strategies to address the unique needs of this community.

Analysis: WSA's one-stop centers and mobile units offer a variety of services to universal customers, including those in the day laborer population.

Current Service Model:

- **Universal Access:**
    - o Individuals can access technology, create WorkInTexas.com profiles, or attend job readiness workshops without enrolling in formal programs.
    - o Demographic and needs-based questions are asked during check-in but are optional to answer.
- **Eligibility-Based Programs:**
    - o **WIOA:** Requires work authorization and selective service verification to qualify for employment and training services.
    - o **TANF/SNAP E&T:** Eligibility is verified through the Health and Human Services Commission (HHSC).

Barriers Faced by Day Laborers:

- **Tracking Challenges:** Many in this population are transient and lack consistent contact information.
- **Limited Access:** Day laborers often lack reliable access to technology, transportation, or trusted sources of information.
- **Legal and Documentation Barriers:** Undocumented individuals face restrictions in accessing certain programs and services.

Proposed Solutions:

To better serve the day laborer population, WSA could leverage its mobile unit to deliver services in partnership with trusted community agencies that already serve this demographic.

Benefits of This Approach:

1. **Trusted Partnerships:** Partnering with community organizations can help bridge trust gaps with day laborers.
2. **Accessibility:** Mobile units can bring services to locations where day laborers gather, eliminating transportation barriers.
3. **Information and Awareness:** On-site support can address misconceptions and inform individuals about services they may be eligible to access.
4. **Technology Access:** Mobile units can provide access to the internet and other tools to create job profiles and apply for work opportunities.

This approach ensures that all customers, regardless of eligibility for specific programs, can utilize universal services and gain awareness of pathways to employment.

Alternatives: There are no alternative approaches being considered at this time, as the proposed solution aligns with WSA's mission and capacity.

Fiscal Impact: No immediate fiscal impact is expected, as the proposal utilizes existing resources, such as the WSA mobile unit and partnerships with local organizations.

Recommendation: WSA staff recommend collaborating with local partners to deliver eligible services to the day laborer population through the mobile unit. This approach will maximize outreach, reduce barriers, and provide direct access to employment resources and information.

Next Steps:
1. **Partner Collaboration:**
   a. Identify and coordinate with community agencies that have established relationships with the day laborer population. For example, NXT Level, school districts, shelters, etc.
   b. Develop a joint plan to provide services at key locations where day laborers congregate.
2. **Service Planning:**
   a. Schedule days for mobile unit deployment in collaboration with partners.
   b. Prepare resources, such as informational brochures, job readiness materials, and technology access for on-site use.
3. **Community Outreach:**
   a. Promote mobile unit events through partner networks and local communication channels.
   b. Provide multilingual support to address language barriers and improve engagement.
4. **Data Tracking and Feedback:**
   a. Track the number of individuals served, services provided, and outcomes achieved.
   b. Collect feedback from day laborers and partners to improve future outreach efforts.

By implementing this plan, WSA will be able to address critical barriers faced by the day laborer population while promoting inclusivity and access to employment services.

MEMORANDUM

To:	Executive Committee
From:	Adrian Lopez, CEO
Presented By:	Victoria Rodriguez, Director of Workforce Services
Date:	March 7, 2025
Subject:	**Capstone Project**

Summary: Over a year ago, Workforce Solutions Alamo (WSA) was approached by Jessica Vachon, a student from UT Health San Antonio pursuing an Occupational Therapy degree, seeking a Capstone Project site. After extensive communication and planning, WSA and Jessica formalized a Capstone Project agreement to develop an asset map for the Student HireAbility Navigator role. This memo provides an overview of the project, key objectives, the action plan, and recommendations for successful implementation.

Analysis: The Capstone Project spans 14 weeks, during which Jessica Vachon will shadow the Student HireAbility Navigator to gather insights and create an organized asset map for the 13-county region. This map will serve as a comprehensive resource, identifying services and support available for individuals with disabilities.

Jessica will also conduct interviews with employers, schools, childcare providers, and community-based organizations to collect data and better understand the existing network of resources. This initiative is designed to leave a lasting impact, offering a valuable tool for WSA, its clients, and its partners to utilize in the future.

Project Benefits:

- A comprehensive, user-friendly asset map for the 13-county region.
- Enhanced understanding of available disability resources for workforce development.
- Strengthened relationships with employers, schools, and community organizations.

Project Objectives:

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1. **Timely Completion:** Ensure the project is completed on schedule with clear deliverables.
2. **Data Quality:** Maintain high standards of data accuracy, relevance, and consistency.
3. **Team Collaboration:** Foster an effective and supportive working relationship between Jessica, the Student HireAbility Navigator, and other stakeholders.
4. **Risk Mitigation:** Identify and manage any potential challenges that may impact project success.

Action Plan:

1. **Regular Meetings:**
   a. **Weekly Check-ins:** Hold one-on-one meetings with Jessica to monitor progress and address questions.
   b. **Bi-weekly Team Meetings:** Facilitate group discussions to share updates, resolve challenges, and align objectives.
2. **Task Assignments and Deadlines:**
   a. Set clear expectations for each phase of the project, including task assignments and timelines.
   b. Regularly review progress to ensure the project stays on track.
3. **Quality Assurance:**
   a. Implement a data validation process to ensure collected information is accurate and complete.
   b. Conduct peer reviews and provide constructive feedback to improve the quality of the deliverables.
4. **Training and Support:**
   a. Provide Jessica with training on data collection, analysis, and reporting tools.
   b. Offer ongoing support and supervision to address any challenges she encounters.
5. **Risk Management:**
   a. **Risk Assessment:** Identify potential risks, such as delays, data inconsistencies, or resource constraints.
   b. **Mitigation Strategies:** Develop solutions to minimize or prevent the impact of identified risks.

Phase	Supervisor Activity
Project Initiation	Review project plan, assign tasks, and schedule meetings.

Data Collection	Guide data collection methods and monitor progress.
Data Analysis	Ensure quality by reviewing techniques and outcomes.
Report Writing	Provide feedback on drafts and ensure clarity of content.
Final Presentation	Review and refine the final report and presentation.
Project Closure	Conduct a post-project evaluation and document lessons.

Alternatives: Currently, there are no alternatives, as this project leverages local talent to achieve goals in a cost-effective manner.

Fiscal Impact: By collaborating with a local student, WSA is offsetting monetary costs associated with short-term projects. This partnership maximizes resources while achieving project goals.

Recommendation: It is recommended that Jessica Vachon present her findings to the appropriate committee at the conclusion of her Capstone Project. Her presentation will provide insights into the asset map and its practical applications for WSA and its partners.

Next Steps:
1. Coordinate closely with Jessica to ensure steady progress on the project.
2. Provide regular supervision and feedback throughout each phase.
3. Prepare for a final presentation to the committee upon project completion.
4. This partnership underscores WSA's commitment to innovative workforce solutions while fostering collaboration with local academic institutions.

MEMORANDUM

To:	Executive Committee
From:	Adrian Lopez, CEO
Presented By:	Victoria Rodriguez, Director of Workforce Services
Date:	March 7, 2025
Subject:	Update on JET Grants

Summary: The Jobs and Education for Texans (JET) Program provides grants to purchase and install equipment for career and technical education (CTE) courses that lead to a license, certificate, or post-secondary degree in high-demand occupations. Educational institutions can apply for JET funding through a competitive grant process.

Eligible applicants include:

- Public junior, state, or technical colleges
- Texas Independent School Districts (ISDs) in partnership with a public junior, state, or technical college
- Open-enrollment charter schools in partnership with a public junior, state, or technical college
- Windham School District

WSA supports schools applying for JET grants by providing the Preapproved Standard Occupation Classification (SOC) List, which identifies in-demand occupations across the Alamo region. As local workforce and labor market experts, WSA assists applicants in selecting appropriate SOCs, proposing workforce-relevant credentials, and strengthening program narratives with data insights.

Analysis:

On December 4, 2024, Governor Greg Abbott announced 60 career training grants totaling over $15 million to Texas higher education institutions and ISDs to prepare students for high-demand, well-paying jobs.

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The Alamo region received four JET grants for FY24, totaling $1,181,619:

- Alamo Colleges District-San Antonio College – $332,507 to train 250 students as software developers and software quality assurance analysts
- Boerne ISD – $319,709 to train 200 students as registered nurses
- Dilley ISD – $179,403 to train 76 students as welders
- Harmony Schools South Texas – $350,000 to train 100 students as licensed practical and vocational nurses
- These investments are projected to generate a total economic impact of $23,159,748 in the region.

2025 JET Grant Application

For FY2025, the JET program has allocated approximately $15 million in grant funding. Applications opened on December 2, 2024, and closed on January 29, 2025.

WSA received requests for assistance and intent-to-apply notices from three regional schools:

- San Antonio ISD – Automotive Service Technicians and Mechanics
- San Antonio College – Computer and Information Systems Managers
- Pearsall ISD – Welding

Alternatives: N/A

Fiscal Impact: Total Alamo Region awarded amount: $1,181,619 and total economic impact is $23,159,748.

Recommendation: To continue WSA staff efforts on informing potential applicants of funding opportunities to maximize regional outcomes and partnerships.

Next Steps: WSA will continue supporting schools applying for JET grants by providing workforce data, verifying in-demand occupations, and helping applicants propose valuable credentials that align with regional labor market needs. This ongoing effort ensures that educational institutions secure the resources needed to train students for high-demand careers and strengthen the Alamo region's workforce.

MEMORANDUM

To:	Executive Committee
From:	Adrian Lopez, CEO
Presented By:	Victoria Rodriguez, Director of Workforce Services
Date:	March 7, 2025
Subject:	Update on CTE

Summary: Perkins V is a federal mandate requiring states receiving federal Career and Technical Education (CTE) funds to align programs of study with high-wage, in-demand, and high-skill occupations. The Division of College, Career, and Military Preparation collaborates with workforce leaders, secondary and higher education institutions to develop and update CTE programs of study. These programs integrate coherent course sequences, industry-based certifications, and work-based learning opportunities to prepare students for high-demand careers in Texas.

The refreshed programs of study were implemented beginning with the 2024-2025 school year.

Analysis: The Regional Programs of Study include:

- Agriculture, Food, and Natural Resources
- Architecture and Construction
- Arts, Audio Visual Technology, and Communications
- Business, Marketing, and Finance
- Education and Training
- Energy
- Health Science
- Hospitality and Tourism
- Human Services
- Information Technology
- Law and Public Service
- Manufacturing
- Engineering

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- Transportation, Distribution, and Logistics

In 2021, the Texas Education Agency (TEA) CTE team developed an interactive platform to map programs of study across Texas. The 2021 release was based on self-reported 2019-2020 data, with an additional 2020-2021 concentrators and completers dataset now available on TEA's CTE website.

Currently, there has been no further statewide update, but WSA is proactively developing a Program of Study Mapping for all 53 school districts in the Alamo region to ensure alignment with regional workforce needs.

Alternatives: N/A

Fiscal Impact: N/A

Recommendation: WSA will map the current CTE programs across the region to identify gaps and address the needs of local school districts. Additionally, this mapping will help forecast future workforce skills, providing employers with valuable insights to align talent development with industry demands.

Next Steps: Consistent with the Carl D. Perkins Career and Technical Education Act of 2006, WSA will continue to fully support the academic and career and technical skills of secondary education students and postsecondary education students who elect to enroll in career and technical education programs.

MEMORANDUM

To:	Executive Committee
From:	Adrian Lopez, Chief Executive Officer
Presented by:	Dr. Ricardo Ramirez, Director of Quality Assurance
Date:	March 7, 2025
Subject:	**TWC Trade Adjustment Assistance (TAA) Monitoring Update**

SUMMARY: Quality Assurance briefing on TWC monitoring of the TAA grant. The item does not require Board action.

BACKGROUND: Federal guidelines require states (TWC) to perform quarterly monitoring reviews of the TAA grant (separate and aside from the annual monitoring). To that purpose, TWC monitored TAA for Quarters 1-2 of 2024. TWC initiated the review on 6/18/2024 and issued a final summary report on 11/25/24.

OUTCOMES: TWC reported a 94.6% accuracy rate (exceeding the expected 90%), with two areas recommended for continuous quality improvement.
- *Re-employment Plan (REP) / Individual Employment Plan (IEP):*
  - Documenting REP/IEP amendments and recording the information in the WIT WFCMS case management system.
  - Documenting breaks in the REP/IEP.
- *Benchmarks & Monthly Contact:*
  - Documenting 30-day contacts in the WIT WFCMS.
  - Documenting academic standing and training completion schedule benchmarks in the REP/IEP.

ACTIONS: As of July 2022, key components of the TAA have been suspended due to the expiration of certain statutory authorizations (e.g., new petitions are not being accepted). Because of this, participant numbers across the state have been decreasing. For example, WSA currently serves less than 10 active customers.

In communication with TWC and to ensure the monitoring activity does not cost more than the items monitored, QA has "risked out" the grant (QA will not be testing the grant this year).

STAFF RECOMMENDATIONS:
- QA has reviewed the highlighted items with all parties, and follow-up actions are in place.
- Because QA 'risked out' TAA, WSA will rely on our contractor partner to continue their internal monitoring of the grant, continuous improvement efforts for the two highlighted items, and submitting quarterly reports to WSA.

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FINANCIAL IMPACT: The monitoring did not result in disallowed or questionable costs.

STRATEGIC OBJECTIVE: To help ensure that local employment and training activities, including one-stop delivery systems and workforce development services, appropriately use, manage, and invest funds as required and in ways that maximize performance outcomes (WIOA Sec. 107(d)(8); WIOA Sec. 134(2)(B)(iv); WIOA Sec. 183; WIOA Sec. 185(c)(3); WIOA Sec. 121(3); WIOA Sec. 129(b)(1)(e); TWC's Board Oversight Capacity evaluation, Texas Labor Code §302.048, TWC Rule §Title 40, Part 20, Chapter 802, Integrity of the Texas Workforce System, particularly §802.61; WD 29-15, Chg. 1; TWC Agency-Board Agreements and Grant Contracts).

ATTACHMENTS:
None. Comments: QA did not include a copy of the report because TWC issued the outcome information in a written email with copies of their testing instruments.

MEMORANDUM

To:	Executive Committee
From:	Adrian Lopez, Chief Executive Officer
Presented by:	Dr. Ricardo Ramirez, Director of Quality Assurance
Date:	March 7, 2025
Subject:	**Business Partner Agreement – Data-Sharing**

SUMMARY: Briefing regarding WSA's *Partner Business Agreement – Data-Sharing* partnership with the City of San Antonio for the ReadyToWork (RtW) contract. At the CEO's and the Board of Directors' discretion, this item provides the option to vote and approve:

- *WSA's Release of Information and Partner Business Agreement (PBA) Procedures* (attached),
- WSA's and the City's *PBA* (attached).

PURPOSE: To establish partnerships, convene local workforce development stakeholders, and serve as primary agent by brokering and leveraging expertise and resources to expand the workforce development system and offer comprehensive services to customers, specifically by implementing data-sharing agreements with key partners.

BACKGROUND: WSA convenes, brokers, and leverages system stakeholders by identifying non-federal expertise and resources to leverage support for workforce development activities (WIOA Sec. 107(d)(3)). By doing so, the Board's strategies help "create and manage more intentional partnerships to facilitate talent solutions, pursue shared goals in support of a healthy and robust workforce, and leverage joint resources" (TWC's Statewide Action Plan, Goal 3, Partnership Managers).

To that purpose, WSA may enter into agreements to pay or share the cost of educating, training, or placing individuals participating in programs, including the provision of supportive services (WIOA Sec. 194(3)(A)). The RtW contract is an excellent example of these efforts. These types of engagements, partnerships, and contracts depend on outcomes, for which WSA is excellently positioned with access to participant information, such as employment and wage information.

Partner Business Agreement (PBA) with the City of San Antonio (RtW)
WSA developed a PBA that meets state-required guidelines for sharing participant information, which is currently under review by the City, specifically for the ReadyToWork contract and its partners.

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Key elements of the PBA include:

- WSA will train and provide technical assistance to three City users with 'view' access to TWC's WFCMS (WIT) system.
- WSA will provide access at our location using the agency's equipment, which meets all necessary networking and infrastructure security requirements.
- RtW partners will ask participants to sign a new Consent to Release Information form (which will authorize WSA to share their information).
- The Consent form includes WSA, the City's RtW Workforce department, and the option to select additional partners.
- The information includes participant wages and employment, with wages structured as a cumulative quarterly sum (and lags behind approximately six months).
- The data include historical information (from six months before the authorization) to three years (after the authorization).
- The process includes a TWC "*P-48, Systems Access Report for Other Agencies and Community Partners,*" which WSA will retain and make available at TWC's request.
- The PBA incorporates all the security requirements specified by TWC's Information Security Standards (IRIS) and other guidelines.
- By requiring registration in WIT, the system links RtW participants with the Board's (and TWC's) labor exchange and American Job Center services.

NEXT STEPS
Once WSA and the City agree on the language of the PBA, WSA will finalize the details, which involves multiple departments: Programs/Operations oversees the engagement, MIS sets up the data and information, IT ensures the system meets security requirements, Fiscal and Procurement validate the leveraging of resources, and QA helps will continue providing technical assistance as well as help maintain internal controls to minimize risk.

STAFF RECOMMENDATIONS:
The Partner Business Agreement supports WSA's efforts to leverage resources and expertise to expand the customer base and provide comprehensive services through data-sharing.

- Staff recommend the Board's support in implementing WSA's *Release of Information and Partner Business Agreement (PBA) Procedures.*
- Staff recommend the Board's support towards leveraging local area resources and expertise with the *Partner Business Agreement* for the City of San Antonio for the RtW contract.

FINANCIAL IMPACT: None.

STRATEGIC OBJECTIVE: Expand WSA's position and customer base by leveraging local resources and knowledge through strategic partnerships while supporting these efforts with Partner Business Agreements. This agreement is likely the first of its kind for the Alamo Board.

ATTACHMENTS:
- Release of Information and Partner Business Agreement Procedures
- WSA-City of San Antonio Partner Business Agreement (PBA) – in draft form.

Partner Business Agreement

COSA-2025-01

between

Workforce Solutions Alamo (WSA)

and

City of San Antonio (COSA)
Workforce Development Office (ReadyToWork)

February 2025

Partner Business Agreement (PBA)

COSA-2025-01
For
Workforce Solutions Alamo and City of San Antonio

This Partner Business Agreement (PBA) is entered into by and between Alamo Workforce Development, Inc. d/b/a Workforce Solutions Alamo (WSA), a non-profit corporation, and the **City of San Antonio, Workforce Development Office (WDO)** ("Partner"), hereto referred as "Partners."

I.   Purpose of PBA
The Partnership supports WSA's mandate to convene, broker, and leverage local workforce development system stakeholders to assist in the development of the local plan and in identifying non-Federal expertise and resources to leverage support for workforce development activities and expand the regional customer base (WIOA Sec. 107(d)(3)).

To that purpose, this PBA promotes the Ready to Work (RtW) contract ("Contract") between the Partners and establishes the requirements for providing access to specific data or information, including personally identifiable information (PII). This PBA serves to support the success and continuation of the contract.

II. PBA Criteria

In support of TWC's Statewide Action Plan (Goal 3), this PBA conforms to the following data-sharing criteria as follows:

a) **Leverages Joint Resources:**
   1. A consortium (which consisted of WSA and additional local community-based partners) entered a contract with the City of San Antonio to provide job training and employment services.
   2. The contract is a hybrid combining cost reimbursement (Direct Client Services) and Fee for Service (Admin/Operations). Over three years, the initial contract added approximately $62,163,075 to WSA, including roughly $59,290,162 as pass-through to our community partners and a cumulative total not to exceed $102,390,463.
   3. The funding derives from the City's local public 1/8th cent sales and use tax for four years collected under a voter-approved initiative.
   4. The Contract was executed on 05/13/2022 with an expiration date of 05/31/2025, including three one-year renewal options.

b) **Pursues Shared Goals:**
   5. The Contract's performance measures include industry-recognized training completions (upskilling and credentials), employment (job gain/placement), and earnings/wages (starting at $15.00 per hour).
   6. These objectives directly promote WSA's and the Texas Workforce Commission's (TWC) strategic and performance accountability goals.

c) **Facilitates Talent Solutions:**
   7. The contract serves residents of Bexar County who meet low-income eligibility requirements.
   8. The Contract prioritizes serving individuals with barriers to employment, including unhoused individuals, those with a criminal background, and veterans.
   9. Since 05/2022, the Contract has expanded WSA's customer base by approximately 4,721 participants who enrolled in training, with 6,268 as a target for the three years.
   10. Since 05/2022, the Contract has expanded WSA's employer base by approximately 392 employers, hiring approximately 853 participants with a starting wage of at least $15/hour.
   11. RtW participants register in WorkInTexas, effectively enrolling them into the WIT Workforce Case Management System (WFCMS), the Texas Workforce Commission's (TWC's) labor exchange system.

III.   Duration of PBA

The PBA shall not exceed the Contract's expiration date of 05/31/2025 or three years from the effective date (see Approval section), whichever occurs first unless the parties terminate the PBA by the terms set forth herein.

This PBA will automatically renew in alignment with amended City-WSA Contract terms that may extend the RtW program beyond 05/31/2025, and the PBA will remain active for three years thereafter unless the parties terminate the PBA by the terms set forth herein.

IV.   Contact Representatives and Staffing Assignments

d) WSA Board Primary Contact
[Enter name/contact information]

e) Name and Address of Partner's Department Office
City of San Antonio, Workforce Development Office

f) Partner Primary Contact
Lori Zamora
Assistant to the Director
Workforce Development Office
City of San Antonio
Lori.zamora@sanantonio.gov
210-207-6514

g) Partner Secondary Contact
Joel Morgan
Assistant Director
Workforce Development Office
City of San Antonio
Joel.morgan@sanantonio.gov
210-753-6297

h) Partner Additional Contact
Richard [enter contact information]

Note: The Partner must apply a strict "need to know" basis. WSA only authorizes access to the data and information for the staff identified in this section and as specified by the participants' Consent to Release Information form, including Partner's staff, subrecipients, providers, contractors, and subcontractors.

i) Partner Staffing Changes
The Partner shall inform WSA of a staffing change within 24 hours. The parties shall terminate the staff person's access to the data or information within 24 hours of the change. Partner must communicate the staffing change as follows.

Following WSA policy MR 817 and TWC Information Security Standards, Board, Contractors, and Partner Agencies must notify the WSA MIS Department before or at the same time a User Access must be removed or disabled. To achieve timely deletion of access, the Partner must submit deletion request forms to the WSA MIS Help Desk at least one (1) business day before a scheduled termination/separation. In the event of an unscheduled termination/separation, the Partner must notify the WSA MIS Department immediately of the termination/separation, including users absent from work for more than thirty (30) days and voluntary and involuntary terminations. For instructions, please refer to the "Help Desk User Guide – Updated 10.2021.pdf" (attached).

j) PBA Amendment Due to Partner Staffing Changes
The Parties shall amend the PBA within ten (10) working days of any staffing changes.

V. Security Forms, Training, and WorkInTexas
k) Security Awareness Training
The Partner's assigned staff must complete WSA-approved security awareness training, including TWC's IT Security Training, before being granted access to any data or information, which staff must complete annually.

l) Information Resources Usage Agreement/P-41 Form
The Partner's assigned staff must sign the *Information Resources Usage Agreement/P-41 Form* (attached) before being granted access to any data or information, which staff must renew every other year.

m) Additional Security Awareness Training
The Partner's assigned staff must participate in a WSA-provided training on TWC guidance, including WD 02-18, Change 1, "*Handling Sensitive Personal Information and Other Confidential Information – Update*" and WD 11-16, "*Access and Data Security for Workforce Applications – Update*," as these may be amended or updated, and complete any additional security awareness training as may be required by WSA (e.g., monthly online 'KnowB4' or as assigned).

n) TWC P-48 Form
WSA shall complete a *Systems Access Report for Other Agencies and Community Partners – P-48* form (attached), which shall become a part of this PBA. WSA shall make the form available to TWC as may be requested.

o) Consent to Release Information – Data-Sharing Form
Participants must complete and sign a *Consent to Release Information – Data Sharing Form* (attached) before WSA provides access to their information. The Partners may develop a release of information form. However, the form must include federal- and state-required information and must be completed and signed by each participant. WSA provides a consent template, which the Partner may use or adapt if the form includes all the required elements (as approved by WSA). The form must identify the Partner and Partner's subrecipients, providers, contractors, and subcontractors for which the participant authorizes the release, along with other required information.

p) **Participant WorkInTexas (WIT) Registration**

As managed by TWC and WSA, WIT WFCMS is the state's official labor exchange platform offering job seekers and employers job matching, career resources, employer services, and workforce development support. Participants must register in WIT before WSA makes their information available.

q) **Other WSA Forms**

To request access to WSA's network, the Partner shall complete and submit the following additional WSA forms (attached):

        12. *WSA MIS Form – New User Access,*
        13. *WSA MIS Form – Other Access.*

VI.   Data and Information

r) Controls

[Enter information of how the data or information will be appropriately controlled depending on the work to be performed].

WSA will grant access to TWC participant data and information only to users who have completed TWC/WSA security requirements (e.g., P-41 and required TWC security training) with a WSA-assigned email address. Section "V" of this document identifies the users.

WSA will only grant access to data and information within a WSA local office with WSA equipment behind WSA's security platform.

s) Data Attributes and Sensitivity Levels

[Describe the specific data attributes or variables to be shared and their sensitivity levels.]

WSA will provide access to WIT WFCMS participants' quarterly wage information to determine if RtW participants reflect having earned wages. The information helps validate the contract's outcomes as an employment proxy indicator.

t) Work Location

[Enter the work location where the data or information will be maintained.]

Information will reside at a WSA data center or Office location.

u) Method

[Enter the method WSA will use to provide the Partner access to the data or information.]

Users will only have view access. The Partners may explore secure methods by which to share the information. Examples include:

        14. View access to WIT WFCMS,
        15. Using WSA's Cabinet system;
        16. Implementing a SharePoint-based system,
        17. Other secure system meeting safeguarding requirements.

v) **Partner's Security Measures**
[Describe how the Partner will ensure the security of the data or information.]

Partner users must complete the mandatory cybersecurity training and Sensitive Personal Information Training (SPI), sign the computer user agreement P-41 form, and adhere to all security requirements.

w) **Partner Staffing Changes**
Upon the departure of a Partner's user, as applicable, any materials obtained from this Agreement by that staff will be collected and returned to WSA or destroyed, and the Partner shall return or destroy all data or information and provide written assurance of that destruction upon the staff's departure or at WSA's request.

x) **Data Usage**
The Partner agrees to only use the data or information for the purpose of this PBA, and any additional WSA data or information encountered during the fulfillment of the PBA will not be used for the Partner's own purposes or disclosed to others, except as authorized by participants with the Consent to Release Information form.

VII.   Reporting Security Incidents
The Partners agree to ensure that if users, or the Partner's subrecipients, providers, contractors, and subcontractors, suspect or know that the handling of data or information in any way violates policy or suspect or know of a privacy incident, regardless of the reason, staff must, at the time of discovery:

18. secure the data or information from further compromise;
19. report the incident to the Partner's Contacts (section "V"); if the Contacts are unavailable or if there is a potential conflict of interest, report the incident to the Partner's Department/Unit or Office Manager or Director, or the Partner's Agency Executive Director in their absence;
20. notify WSA immediately of all confidentiality breaches or reasonably assumed release of confidentiality;
21. not compromise the data or information further by including PII when reporting the incident;
22. document and maintain records relevant to the incident, as WSA's (and TWC's) privacy incident handling might require them;
23. if the incident was not a breach but confidentiality policies were violated, take corrective action to minimize further incidents.

VIII.   Violations
A violation is any noncompliance with TWC/WSA sensitive information requirements, its associated standards, guidelines, or procedures, including any event that results in theft, loss, unauthorized use, unauthorized disclosure, unauthorized modification, unauthorized destruction, or degraded or denied services of information resources constituting a security incident.

Violations may result in criminal prosecution. Violations may include but are not limited to any act that:

24. exposes the organization to actual or potential monetary loss through the compromise of information resources security,
25. involves the unauthorized disclosure of confidential and sensitive information,
26. involves the unauthorized use of organization data or resources,
27. involves the use for personal gain, unethical, harmful, or illicit purposes,
28. results in public embarrassment to the organization.

y) Criminal and Civil Sanctions

The Partners must be aware and shall advise Partner staff, subrecipients, providers, contractors, and subcontractors of the criminal and civil sanctions for unauthorized usage or disclosure of the data or information and related responsibilities.

Failure to comply with confidentiality requirements and failure to take appropriate action to prevent any improper use or disclosure of sensitive and other confidential information for an unauthorized purpose is subject to sanctions or other actions as deemed necessary by WSA (and TWC) up to and including termination of the Agreement, or criminal or civil prosecution. The parties agree they must hold accountable individuals who improperly use or disclose sensitive and confidential information for unauthorized purposes.

IX.   Indemnification (*adapted from the WSA-City Child Care Services Contract*)

Only as it concerns this Agreement, Partner agrees, to the extent permitted by Texas law, to defend, indemnify and hold harmless (i) WSA, its board members, officers, employees, and representatives; and (ii) TWC, USHHS and USDOL and any officers, agents and employees of these agencies, from any and all claims, demands, judgments, awards, liens, fines, penalties, damages to property, settlements, administrative proceedings and/or investigations, lawsuits, verdicts, injuries, losses, defense expenses (including attorney's fees, costs, and litigation related expenses) related to, resulting from, arising out of, or incidental to any claim, demand, suit, or allegation:

    a. Partner's delivery, operation, and performance of services under this Agreement;

    b. by any of Partner's former (an employee that performs services under this Agreement that during the term of this Agreement should no longer be or remain an employee of Partner for any reason and commits an act of any kind that results in a claim or cause of action to be filed against WSA) or present employees, subcontractors, providers of goods or services, or any entity or agency asserting any rights on behalf of any of the foregoing individuals or entities, including, but not limited to, any individual/agency alleging, asserting, demanding or claiming any of the following:

29. Violations of any right under the federal or state common-law or constitutions caused, in whole or in part, by the actions, inactions, omissions, intentional acts, and/or negligence of Partner, its officers, directors, agents, employee and other legal representatives; and/or

30. Violations of any federal, local or state statute, regulation, rule, standard, Executive Order, ordinance, or law caused by the actions of Partner, its officers, directors, agents, employees or other legal representatives.
31. from all subcontractors, materials, persons, laborers, and any other persons, firms, or corporations, furnishing or supplying work, services, materials, or supplies in connection with the performance of this Agreement and from any and all claims and losses accruing or resulting to any persons, firms or corporations which may be injured or damaged by Partner in the performance of this Agreement; and
32. damages to property and/or resulting loss of use thereof and from any loss or damage arising from bodily injury, including death, to the extent that such claims, losses, liabilities, expenditures, or damages are caused in whole or in part by the negligent acts or omissions, or intentional or reckless acts of Partner, its employees, officers and agents, or its subcontractors, whether or not mixed with negligence of WSA.

Partner shall at WSA's option, defend or pay for an attorney subject to WSA's approval, to defend WSA, its agents, board, officers and employees against any and all claims, losses, liabilities, damages and expenditures of any kind, including attorney's fees, court costs, and expenses caused by the negligent, intentional or reckless acts or omissions of Partner, its employees, agents, board, or officers, or its contractors, subcontractors, their employees, agents, or representatives or any parties in privy with Partner.

In the event of a claim or suit against WSA or Partner arising out of the performance of this Agreement, Partner will furnish to WSA all non-privileged information in possession of Partner pertaining to such suit or claim, upon request. Such evidence and information will be furnished at the expense of Partner.

The provisions of this section shall survive the expiration or termination of this Agreement.

Nothing within this Section or this Agreement shall require Partner to indemnify TWC and/or WSA against any claim, demand, or cause of action whatsoever, based solely or in-part because of any intentional or negligent act or omission of WSA, its officers, directors, members, agents, employees, or other legal representatives.

Nothing in this Section or any other provision of this Agreement or any Addendum shall be construed as a waiver of the notice requirements, defenses, immunities and limitations WSA may have under the laws of the State of Texas.

X.   Monitoring and Other Requirements
z) Monitoring
Only as applicable to this Agreement, the Partner, and as may be appropriate, the Partner's staff, subrecipients, providers, contractors, and subcontractors, agrees to be subject to monitoring, logging, audit, and review by WSA, TWC, and other state or federal agencies as may be required by law, including auditing the Partner's work.

aa) **Non-financial Understanding**

This PBA is a non-financial understanding between both Parties. The party's signatures do not imply any financial obligations by or on behalf of either party.

bb) **Independence**

Each party shall be, and shall be deemed to be, an independent party and not an agent or employee of the other party. Each party shall have exclusive control over the work performance of its staff, subrecipients, providers, contractors, and subcontractors.

XI.   Amendments

The Parties may amend this PBA at any time in writing by mutual consent and must amend it as may be required by other provisions in this PBA. The Parties shall send PBA modifications to:

Workforce Solutions Alamo	[Partner Agency Name]
Adrian Lopez, CEO	[Name of Person with Signatory Authority, Title]
100 N. Santa Rosa, Suite 120,	
San Antonio, TX 78207	[Address]
(210) 272-3260	[Telephone Number]
alopez@wsalamo.org	[Email]

XII.   Consensus or Resolution Process

The signatories to this PBA shall amicably exert their best effort to resolve any dispute that may arise under this PBA. Any dispute that the Parties are unable to resolve shall be submitted to the CEO of WSA for resolution.

XIII.   Termination

The Partner may cancel this PBA via written notice to WSA, which shall take effect thirty (30) calendar days upon delivery to WSA.

WSA may cancel this PBA at its discretion, for cause (i.e., a material or significant breach of any PBA provision) or as may be deemed in WSA's best interests. WSA's cancellation of this PBA shall be effective upon delivery of written notice to the Partner.

Upon notice of cancellation or termination, or at the time of expiration, the Partner shall immediately return, delete, or destroy all data and information and provide written assurance of such destruction.

XIV.   Approval

The undersigned parties bind themselves to the faithful performance of this PBA. This PBA shall not become effective until approved by both Parties. IN WITNESS WHEREOF, the Parties have caused this Agreement to be executed by their duly authorized representatives on the _____ day of _____, 2025 ("Effective Date").

Persons with signatory authority for the Parties

Alamo Workforce Development, Inc. **d/b/a Workforce Solutions Alamo**	**City of San Antonio,** **Workforce Development Office**
Signature	Signature
Adrian Lopez Chief Executive Officer	[Name] [Title]

XV.   Attachments

33. TWC P-48 Form – Systems Access Report for Other Agencies and Community Partners
34. TWC P-41 Form – Information Resources User Agreement
35. WSA Consent to Release Information – Data-Sharing Form
36. WSA MIS Form – New User Access
37. WSA MIS Form – Other Access
38. WSA Help Desk User Guide

Workforce Solutions Alamo

Release of Information and Partner Business Agreement Procedures

Version1.0
July 15, 2024

It is the policy of Workforce Solutions Alamo (WSA) that its Board of Directors, employees, subrecipients, subcontractors, contractors, and consultants will protect the Information Resources (IR) of WSA in accordance with the Texas Administrative Code (TAC), Title 1, Part 10, Chapter 202, Information Security Standards, and the Information Resources Management Act (Texas Government Code Chapter 2054). WSA will also protect the IR of WSA in accordance with other applicable state and federal laws.

Contents

Introduction

WSA will implement the following procedures to develop Release of Information forms and Partner Business Agreements (PBA).

Purpose

One of WSA's strategic goals is to convene local workforce development stakeholders and serve as a primary agent by brokering and leveraging expertise and resources to expand the workforce development system and offer comprehensive services to customers.   In support of that effort, WSA maximizes grant and funding opportunities by fostering partnerships using Partner Business Agreements and Consent to Release Information forms for participants.

This procedure describes how WSA, its subrecipients, and contractors may use customer information to make referrals for support or wrap-around services and collaborate with stakeholders to expand the workforce development system, including sharing information beyond standard referrals.

Background

Most, if not all, grant awards include provisions requiring WSA to remove barriers preventing participants from successfully attaining their goals. Release of Information Forms and PBAs promote expanded services and resources to support participants' success while protecting their personally identifiable information (PII).

As Board partnerships and customer base expand, including increased referrals and customer information sharing, WSA aims to secure data, prevent unauthorized access to files and records, and protect information from accidental or intentional destruction, disclosure, or misuse (WD 11-16).

In all instances, WSA applies a strict 'need to know' standard for subrecipients, community partners, and other agencies with a valid need, as determined by WSA under *TWC's Information Security Standards and Guidelines[1]* (WD 11-16) and as allowable by law.

Definitions

Confidential Information: Information that must be protected from unauthorized disclosure or public release based on state or federal law (e.g. the Texas Public Information Act, and other constitutional, statutory, judicial, and legal agreement requirements). The term also includes information protected specifically by federal or state laws, including TWC, rules and regulations (e.g., IRS, SSA, HIPAA privacy regulations, Title 1 TAC Chapter 202, and TWC Information Security Standards). Appropriate controls must be applied to prevent unauthorized disclosure. See TWC's Data Classification Reference Guide for more information on Confidential Data (IRIS SG9.5.1).

Confidentiality: The legally required process of keeping secret and protecting personal privacy and proprietary information from unauthorized access and disclosure (TWC Privacy Manual 2.3).

Personally Identifiable Information (PII): Information which can be used to distinguish or trace an individual's identity, such as their name, social security number, biometric records, etc. alone, or when combined with other personal or identifying information which is linked or linkable to a specific individual, such as date and place of birth, mother's maiden name, etc. (OMB M-07-16; TEGL 39-11).

Protected PII and non-sensitive PII: the Department of Labor has defined two types of PII, protected PII and non-sensitive PII. The differences between protected PII and non-sensitive PII are primarily based on an analysis regarding the "risk of harm" that could result from the release of the PII (TEGL 39-11).

- **Protected PII** is information that if disclosed could result in harm to the individual whose name or identity is linked to that information. Examples of protected PII include, but are not limited to, social security numbers (SSNs), credit card numbers, bank account numbers, home telephone numbers, ages, birthdates, marital status, spouse names, educational history, biometric identifiers (fingerprints, voiceprints, iris scans, etc.), medical history, financial information and computer passwords (TEGL 39-11).
- **Non-sensitive PII**, on the other hand, is information that if disclosed, by itself, could not reasonably be expected to result in personal harm. Essentially, it is stand-alone information that is not linked or closely associated with any protected or unprotected PII. Examples of non-sensitive PII include information such as first and last names, e-mail addresses, business

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[1] TWC's Information Security Standards and Guidelines is abbreviated as "IRIS."

addresses, business telephone numbers, general education credentials, gender, or race. However, depending on the circumstances, a combination of these items could potentially be categorized as protected or sensitive PII (TEGL 39-11).

Sensitive Information: any unclassified information whose loss, misuse, or unauthorized access to or modification of could adversely affect the interest or the conduct of Federal programs, or the privacy to which individuals are entitled under the Privacy Act (TEGL 39-11).

TWC Information: records maintained and obtained by WSA from TWC, including (1) records and data compilations provided electronically, on paper, or via online access or e-mail; (2) records and data compilations that WSA has converted to another format or medium (such as handwritten or electronic notes); (3) records and data compilations incorporated in any manner into WSA's records, files, or data compilations (TWC Agency Board Agreement / ABA).

Workforce Application: includes all TWC computer-based automated systems, such as TWIST, the VOS Greeter, and WorkInTexas (WD 11-16), as well as other systems that WSA may use to record information (e.g., data applications from non-TWC grants or contracts, and any other application that WSA uses to manage information).

WSA Subrecipient: includes the TWC Adult/One-Stop, Youth, and Child Care service providers (contractors).

Referral Form

For participants, WSA uses two types of Release of Information forms, a *Referral Form* and a *Data-Sharing Form*, the latter of which a PBA must accompany. The following provides a general description of the Referral Form.

Release of Information – Referral Form (for Participants)
WSA subrecipients ask eligible individuals registering for services to sign a standard 'Release of Information' or 'Referral Form.' Participants sign the Referral Form to authorize WSA to 'release' their information, including specified personally identifiable information (PII), to other entities for 'referral' purposes.

Federal, state, and other grant awards require WSA subrecipients to refer customers to partner agencies so they may access resources and services that promote participation and goal attainment, such as but not limited to:
- *Barrier Removal*: for 'wrap-around' services, such as child care, transportation, clothing, housing, food, and other supports and assistance needed to promote their participation in WSA services by removing barriers.
- *Work Preparation*: to help skill, upskill, train or retrain, and prepare or promote customers for employment, such as education and training providers, mentoring and tutoring services, and partners offering job readiness, assessments, etc.
- *Employment*: to help customers gain employment or participate in work-related opportunities, such as work experience, internships, apprenticeships, on-the-job training, etc., such as with employers.

- *Pre- and Post-employment*: for instance, with community-based organizations for customers participating in TANF/Choices (TWC Choices Guide, B-203).
- *Child Care Job Search*: staff refer parents during their initial job search to WSA Centers for assistance with WIT and provide them access to services available through the one-stop delivery network and, as appropriate, for Wagner-Peyser (TWC Child Care Services Guide, D-1008.d; TAC §809.56(f) and §801.28).
- *Family Violence*: for individuals who may be victims of family violence to a specialized professional or agency.

Customers complete the *Release of Information – Referral Form* to authorize WSA to share the *least information needed* to make the referral and coordinate the service.
- The Referral Form does not authorize sharing more information than is needed to make the referral and coordinate the service.
- When referring participants, staff must follow related WSA policies, TWC guidelines, and grant award requirements.

The Appendix includes examples that subrecipients and contractors may use for this purpose, which may be adapted depending on the grant using the least amount of customer information needed to make the referral and coordinate the services.

Expanding the Workforce Development System

Context
WSA authorizes its subrecipients access to TWC workforce applications. Sometimes, participants and WSA benefit from sharing information with specific partners and community organizations by going beyond the standard 'referral' process (WD 11-16).

Participants benefit from sharing additional personally identifiable information (such as wages and employment information) when WSA further fulfills its function and mission as a Local Board (WIOA Sec. 107(d)(3)):
- o **"Convening, Brokering, Leveraging.**— The local board shall convene local workforce development system stakeholders to assist in the development of the local plan under section 108 and *in identifying non-Federal expertise and resources to leverage support for workforce development activities.*"

WSA's expansion of the workforce development system also aligns with *TWC's Statewide Action Plan* (Goal 3, Partnership Managers):
- "To **create and manage more intentional partnerships to facilitate talent solutions, pursue shared goals** in support of a healthy and robust workforce, **and leverage joint resources.**"

Convening, brokering, and leveraging joint resources and facilitating talent solutions that pursue shared goals beyond federal and state investments requires, for example:
- Careful planning.
- Partner accountability.
- High levels of collaboration.

- Communication amongst partners.
- A coordinated approach to managing resources, investments, grants, and contracts, their services, and related data and information.

WSA recognizes that levering is not only critical but also required, as WIOA funds shall only be used for activities that are in addition to activities that would otherwise be available in the local area in the absence of such funds (WIOA Sec. 194(2)). In addition, WSA may enter into an agreement with another local area (including a local area that is a city or county within the same labor market) to pay or share the cost of educating, training, or placing individuals participating in programs, including the provision of supportive services (WIOA Sec. 194(3)(A)).

PBA Criteria
Releasing or sharing workforce application data (PII) beyond the Referral Form requires each of the following:
1. A grant, investment, award, or contractual arrangement in which WSA participates;
2. The grant, investment, award, or contact directly expands the agency's funding and customer base for workforce development;
3. The successful continuation of the grant, investment, award, or contract depends on sharing data or information beyond the standard referral for supportive services (e.g., it's part of the investment's performance and reporting goals);
4. A TWC P-41 Form.

In addition, WSA assesses the quality and quantity of the effort's contribution to three elements, including the degree to which the partnership's investment:

- *Leverages Joint Resources*: its investments support WSA's costs and require additional commitments to continue (such as tracking and reporting customer status, progress, and outcomes), and ideally are relatively substantial.
- *Pursues Shared Goals*: its performance measures or goals align with, resemble, or contribute towards workforce development outcomes (e.g., employment, training/education, or earnings).
- *Facilitates Talent Solutions*: it serves customers and populations that help expand WSA's customer base within the workforce development area (e.g., prioritizes individuals with barriers to employment, helps cover specific geographic areas, strategically supports WSA's mission and vision with employers and industry, etc.).

Note: Research type of efforts need not include PII (WSA may report information by aggregating the data, such as zip codes, census tracts, or other summarized levels).

PBA Procedure
A PBA's development, approval, and maintenance require several steps and involvement from multiple parties.

PBA Approval Process
Staff must complete the following actions to process PBAs, unless otherwise specified. Deviations from the process require a written document with justification.

1. Procurement validates that WSA has an active grant, investment, or contract with a Partner agency.
2. Chief Financial Officer (CFO) documents and confirms:
   o the project's investment (total investment for the project), and
   o the leveraging of joint resources (WSA's and the Partner's financial contribution towards the project).
3. Chief Operations Officer (COO) documents and confirms how the project:
   o pursues shared goals, and
   o facilitates talent solutions.
4. COO develops a PBA (for an individual partner) and its accompanying Release of Information – Data Sharing form (for customers).
5. CIO approves the PBA and Release of Information-Data Sharing form.
6. Individuals with signatory authority for WSA and the Partner sign the PBA.
7. Chief Process Officer (CPO) completes P-48 in accordance to the PBA, retains the form, and makes it available to TWC upon request.
8. MIS ensures partner staff members sign P-41 forms and complete the required IT training.
9. IT validates the PBA's alignment with TWC's data security requirements (e.g., to ensure the data-sharing method satisfies protection requirements).
10. Contract Management coordinates customers' signing of the Release of Information – Data-Sharing form.
11. MIS validates required documents (including signed P-41s, IT Training certificates of completion, signed PBA, and P-48).
12. Per the PBA, MIS provides the Partner access to the data or information.
13. Contract Management performs ongoing oversight of the PBA.
14. Fiscal conducts oversight of the investment.
15. MIS generates the data and facilitates information sharing.
16. IT ensures the data's ongoing security maintenance.
17. QA monitors process as may be needed.

PBA Approval Checklist

The approval process benefits from the usage of a *PBA Approval Checklist* (attached), which staff may use to document and validate the successful completion of each task with their initials.

PBA Elements

The PBA sets the parameters under which WSA and the Partner may share customer data or information to expand the workforce development system. The PBA must include the following elements.

Standard Information
- Name of the Partner agency.
- The purpose.
- PBA Criteria: a description of how the partnership meets the required criteria.
- Start and end dates (may not exceed three calendar years).
- Procedures to amend and, as applicable, a description of circumstances that may require an Amendment.

- Procedures to terminate and, as applicable, a description of circumstances that may require termination.
- A 'Modification and Consensus Process' statement.

Contact Representatives and Staffing Assignments
- The name/title and contact information of the WSA Board Staff assigned as primary contact for the Partner and who shall work with the Partner to ensure compliance with all applicable state and federal requirements and according to the Agreement (IRIS SG38.10).
- The name/title and contact information of the Partner's Staff assigned as primary contact for the Agreement and who shall work with WSA to ensure compliance with all applicable state and federal requirements and according to the Agreement.
- The names, titles, and contact information of the Partner's staff directly working with the data or information as part of the Agreement.
- WSA must terminate access to the data or information within 24 hours of a Partner's staffing changes (WD 11-16).
- The Agreement must be updated within 24 hours of any staffing changes (IRIS SG38.11).
- A reference advising staff of the criminal and civil sanctions for unauthorized usage or disclosure and related responsibilities (IRIS SG36.7).

Security Forms and Training
- The Partner's assigned staff must complete an approved security awareness training (e.g., TWC's IT Security Training) before being granted access to any TWC/WSA PII (IRIS SG36.1), which must be completed annually (IRIS SG36.5).
- The Partner's assigned staff must sign the Information Resources Usage Agreement/P-41 before being granted access to any TWC/WSA PII (IRIS SG36.2), and which must be renewed every other year.
- The Partner's assigned staff must complete any additional security awareness training as may be required by WSA. WSA's training shall at minimum include relevant TWC guidance, including WD 02-18, Change 1, WD 11-16, and other TWC or WSA related policies.

Data and Information
The Agreement must state and include the following language, as applicable. If not applicable, the Agreement must specify why the requirement does not apply to the partnership.
1) How the data/information will be appropriately controlled depending on the work to be performed (IRIS SG38.1).
2) The specific data or information that may be shared and its sensitivity levels (IRIS SG38.1, SG38.5).
   a) Identify the specific data attributes or variables.
   b) WSA IT includes a description of the sensitivity level of the data.
3) The work location where the data or information will be maintained (IRIS SG38.1). Note: see 'method' section below.
4) The method that WSA will use to provide the Partner access to TWC data or information. WSA will apply the following criteria in sequential order, selecting the most restrictive option beginning with "a." If "a" is not an option, then "b," and so forth:

a) WSA reports summarized information (without PII).
b) WSA retains possession of the data and information and, if necessary, provides 'viewing' or "read-only" rights to the Partner (e.g., via VPN, Cabinet, SharePoint, or other secure method).
c) The investment requires WSA to release the data or information to the Partner.
   i) All pertinent TWC IRIS security requirements become applicable and enforceable concerning WSA's oversight responsibilities for the data to ensure their security.
5) A description of how the Partner will ensure the security of the data or information to which the Partner may have access (SG38.2, SG38.6).
6) A statement ensuring that upon the departure of a Partner's staff all materials will be collected and returned to WSA or destroyed, as appropriate, and that the Partner will return or destroy all data or information and provide written assurance of that destruction upon termination of the Agreement or at the request of WSA (IRIS SG38.7).
7) A statement requiring the Partner to only use WSA data or information for the purpose of the terms of the Agreement (IRIS SG38.8).
8) A statement requiring that any additional WSA information encountered during the fulfillment of the Agreement cannot be used for the Partner's own purposes or disclosed to others (IRIS SG38.9).
9) A statement requiring Partner employees to immediately report all security incidents directly to WSA's primary contact (IRIS SG38.12; WD 02-18).

Monitoring and Other Requirements
- Depending on the type of agreement, the Partner agrees to be subject to monitoring, logging, audit, and review by WSA, TWC, and other state or federal agencies as may be required by law, including the auditing of the Partner's work directly tied to the Agreement (IRIS p.3, SG38.15).

Release of Information – Data-Sharing Form (for Participants)
Sharing data or information beyond a standard "Referral" requires a PBA and a signed *Consent to Release Information – Data-Sharing Form* from each customer.

Individuals authorized by law to receive or have access to participant data or information include entities identified in a signed release from the participant (WD 02-18). As owners of their data and information, customers who sign the *Consent to Release Information – Data-Sharing Form* authorize WSA to 'share' additional personally identifiable information (PII).

To properly inform customers about what, when, how, and with whom WSA will share their PII, the *Consent to Release Information – Data-Sharing Form* must, at minimum, include the following elements.

1) The **name(s) of the Partner(s)**, including their specific office or unit with whom WSA will share the information. For example:
   a) Name of entity, and
   b) Name of the unit, department, or office of the entity.
   c) The customer's release may include multiple Partners.
2) The **length or duration** of the release. The release must:

a) Include a limited duration not to exceed three years (into the future from when the Consent is sigend), and
b) The duration must be justified with a description. For instance,
    i) What services or resources will the joint effort offer the customer during the timeframe?
    ii) If the duration depends on contract- or grant-related goals or reporting requirements, the release must specify this to allow the customer to agree (or not).
3) A **description of the specific data or information** WSA will share.
    a) The specific attributes or variables involved (TWC Information Security Standards, SG38.5), for example, status or progress regarding employment, employer name, wages, training, grant participation, and other information.
    b) The timeframe of the data.
        i) Information may include historical data (from before the date the customer signed the release) only if the release contains:
          (1) the timeframe, and
          (2) a justification for the timeframe that aligns with the contract's purpose or goals, and
          (3) the success or continuation of the contract depends on that timeframe.
        ii) Otherwise, the data may only apply from the date the customer signs the release on forward (e.g., not data or information from before that date).
    c) A description of the source of the information, for example, TWC WorkInTexas employment outcomes, TWC WorkInTexas and TWIST Wage information, etc.
4) The **specific purpose** for which WSA will share the information and which aligns with how the Partner(s) will use the information for the purposes of the associated PBA (TWC Information Security Standards, SG38.8). For example:
    a) To provide training and support services for employment attainment, retention, or advancement.
    b) The investment requires sharing the information for its continuation and success.
5) Language that describes **how the Partner** will protect the information, which must meet or exceed existing required protections (TWC Information Security Standards, SG38.6).
6) Information describing **how the customer may terminate the release**.
7) **The customer's information and approval**: name, signature and, as may be needed, additional information, such as date of birth, and full or partial social security number (SSN).

Data Requests and Releases

WSA MIS must document data releases and adhere to the *PBA* and *Consent to Release Information – Data Sharing Form* specifications.

References

- TWC Agency Board Agreement (ABA Contract)
- TWC Statewide Action Plan
- TWC Texas Information Security Standards (IRIS)
- TWC Privacy Manual
- WD 11-16, Access and Data Security for Workforce Applications

- WD 24-11, Change 1, Reporting Negative Incidents Involving Texas Workforce System Customers – Update
- WD 02-18, Change 1, Handling Sensitive Personal Information and Other Confidential Information – Update
- 20 C.F.R. Part §603, Federal-State Unemployment Compensation (UC) Program; Confidentiality and Disclosure of State UC Information
- Texas Labor Code §301.085, Unemployment Compensation and Job Matching Services Information; Offense; Penalty
- 40 TAC Chapter §815, Unemployment Insurance, Subchapter E, Confidentiality and Disclosure of State Unemployment Compensation Information
- Texas Administrative Code Title 1, Part 10, Chapter §202, Information Security Standards
- Texas Government Code §2054, Information Resources
- TEGL 39-11, Guidance on the Handling and Protection of Personally Identifiable Information (PII)
- OMB M-07-16, Safeguarding Against and Responding to the Breach of Personally Identifiable Information
- WIOA Sec. 107(d)(3), Functions of the Local Board
- Associated federal and state laws and regulations, including but not limited to FERPA, HIPAA, and the HITECH Act

Attachments

- Partner Business Agreement (PBA) – Approval Checklist
- Partner Business Agreement (template)
- Consent to Release Information – Data-Sharing Form (template)
- Release of Information – Referral Form (Examples)

MEMORANDM

To:	Executive Committee
From:	Adrian Lopez, CEO
Presented By:	Eric Vryn, Chief Process Officer
Date:	March 7, 2025
Subject:	**Update: Ready to Work**

Summary: This memorandum provides the final update on the Ready to Work (RTW) program analysis, following multiple briefings to the committee throughout 2024.

Since the committee's last briefing, several revisions have been made to the draft analysis, incorporating updated performance metrics and revised data evaluations. While these updates refine certain aspects of the analysis, the core findings and conclusions remain unchanged.

Additionally, one new recommendation has been added to the analysis to address ongoing challenges related to program implementation. This memorandum presents the final analysis and recommendations for Board review and consideration.

Analysis: The WSA RTW Program Analysis (2025) identifies four primary operational challenges impacting program effectiveness:

1. **Enrollment & Completion Challenges**

    a. Enrollment and completion rates remain below target despite updated metrics.

        i. 7,273 applicants interviewed (72.5% of goal)

        ii. 4,713 participants enrolled in training (75.2% of goal)

        iii. 32.7% completion rate, indicating significant participant attrition

    b. Employer hiring conversion rates remain low.

        i. 549 employers have hired RTW graduates (35.5% of successful completions)

        ii. Less than 3% of pledged employers have hired RTW participants

2. **Administrative & Compliance Burden**

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a. SYNC data system requires 150+ fields per participant, including 37 critical fields for invoicing

b. COSA's funding guide updates (5 in the last 6 months) continue to create inefficiencies

c. Technical Assistance Review (TAR) compliance mandates remain misaligned with contract terms

3. Intake & Case Management Inefficiencies

a. Case managers handle 300-350 participants each, limiting individualized support

b. 69% of case managers' time is allocated to compliance-related data entry, reducing participant engagement

c. Engagement model (1-2 contacts per month) remains insufficient for high-barrier participants

4. Financial & Invoice Processing Inefficiencies

a. Invoice revision rate remains high at 63.6%, requiring 1.45 revisions per invoice

b. Processing inefficiencies consume 30% of fiscal staff capacity, delaying reimbursements

c. Reimbursement model remains misaligned with job placement and retention service costs

These issues continue to limit the RTW program's effectiveness and scalability, requiring targeted improvements.

Alternatives: None

Fiscal Impact: The fiscal department is conducting a separate analysis on the financial implications of these findings. That report will be presented by the CFO at a later date.

Recommendation:

1. Negotiate with COSA to implement a tiered compliance model to reduce administrative burdens while ensuring data integrity.

2. Standardize SYNC and invoicing processes, limiting funding guide updates and requiring structured change management protocols.

3. Reevaluate the reimbursement model to reflect the full costs of placement and retention efforts.

4. Conduct an external third-party review of RTW's financial and operational framework.

Next Steps: WSA is currently engaged in discussions with the City of San Antonio (COSA) regarding these issues. We will provide regular updates to the Board as these discussions progress and resolutions are reached.

Attachment- Update Ready to Work Analysis

Workforce Solutions
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MEMORANDUM

To:	Adrian Lopez, Chief Executive Officer
From:	Eric Vryn, Chief Process Officer
Date:	March 7, 2025
Subject:	Ready-to-Work Program Analysis

Introduction:

In 2020, San Antonio's unemployment soared to a staggering 12%—the highest in recent history. Ready-to-Work (RTW) was conceived as a solution to this economic crisis, answering the call for bold workforce development. Voters rallied behind the program in November, approving $200 million in funding through a 1/8-cent sales tax to fuel an initiative aimed at uplifting the city's marginalized communities and households earning below 250% of the federal poverty line. This initiative was also a commitment to the community that there were solution pathways to move workers into more economically secure futures.

However, after more than three years into the program, RTW has struggled to fully achieve its targeted goals, raising questions about the program's future trajectory and efficacy. Concerns regarding RTW's capacity to drive sustainable economic transformation have prompted some community leaders and stakeholders to call for a more comprehensive analysis of its impact.

In early 2024, Workforce Solutions Alamo (WSA) initiated a focused analysis of RTW, examining internal processes and operations of the agency as well as the impact City of San Antonio (COSA) program requirements and guidelines has had on its implementation of the program.

This report presents an analysis focused on WSA's role in operationalizing RTW's objectives, leveraging data from both WSA and the COSA, balanced by in-depth observations and interviews with WSA RTW staff and contractors. While acknowledging that an audit of all partner agencies falls beyond the scope of this analysis, the findings aim to provide a transparent and objective evaluation of RTW's progress to date and offer insights on potential pathways to enhance its impact.

Summary:

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The Ready-to-Work (RTW) program has been hampered by serious operational challenges that have impacted its effectiveness and scalability. This analysis focuses on systemic inefficiencies across four (4) key areas:

1. **Program Performance:** *Substantial gaps between targets and actual outcomes signal systemic issues in participant engagement and progression.*

2. **Data Compliance:** *Complex reporting requirements and frequent guideline changes create an unsustainable administrative burden.*

3. **Participant Support:** *Administrative burden on case managers severely limits quality time with participants, compromising program effectiveness from intake to job placement.*

4. **Financial Management:** *Invoice processing inefficiencies and a potentially misaligned reimbursement model undermine the program's financial sustainability.*

The challenges stem from a combination of factors, including overly rigid program structures, inadequate data management systems, and insufficient inter-organizational coordination. If not addressed, these issues risk undermining Workforce Solutions Alamo's (WSA) effectiveness and long-term viability in implementing the RTW program.

This analysis provides data-driven insights into these critical issues and offers several evidence-based recommendations to streamline operations, enhance program efficacy, and better serve the San Antonio community. By proactively addressing these challenges, there is an opportunity to transform the Ready-to-Work (RTW) program into a more robust, efficient, and measurably impactful initiative that can scale to meet growing community needs.

Current State:

I. WSA Program Performance

Metric	*Actual*	*Goal*	*Performance*
Unique Applicants (Interviewed at Intake)	*7,273*	*10,033*	*73%*
Enrolled in Approved Training Programs	*4,713*	*6,268*	*75%*
Participants that Exited or Completed Training	*2,193*	*N/A*	*N/A*
Participants that successfully completed	*1,545*	*N/A*	*N/A*
Employers Hiring RTW Graduates	*549*	*N/A*	*N/A*

Current Performance Metrics:

The program's current data shows 7,273 applicants interviewed against a target of 10,033, achieving 72.49% of the target. For enrollment, 4,713 participants are enrolled in training programs against a target of 6,268, achieving 75.19% of the goal. These numbers represent the initial engagement effectiveness of the program.

Training Completion Analysis:

From 4,713 enrolled participants, 1,545 achieved successful completion, representing a 32.78% success rate. In other words, approximately two-thirds of enrolled participants do not successfully complete their training program, which indicates significant challenges in participant retention and program completion that warrant careful examination.

Historical Performance Review:

The program's historical data provides important context for current performance:

Year 1 established baseline metrics:

- Interview achievement: 92.4% (2,670 of 2,887)
- Case management: 141.7% (1,868 of 1,318)
- Enrollment: 109.7% (1,447 of 1,318)
- Completion rate: 62%

Year 2 showed performance changes:

- Interview achievement: 83.3% (2,900 of 3,480)
- Case management: 90.8% (1,723 of 1,896)
- Enrollment: 109.9% (2,085 of 1,896)
- Completion rate: 72%

Current metrics demonstrate measurable changes from these earlier periods:

- Interview achievement decreased by 19.9%
- Enrollment performance decreased by 34.6%
- Overall completion rate shows 32.7% of enrollees achieving successful completion

Employment Results:

Examining employment outcomes, of the 1,545 participants who successfully completed training, the program data shows 549 employers hiring RTW graduates. This indicates that employer hiring engagement represents 35.5% of successful program completions.

While COSA has successfully engaged close to 500 employers who have pledged support for the program, less than 3% of them have hired RTW graduates. This low conversion rate indicates that the program has not translated into significant employment outcomes for WSA participants or other prime agency participants, limiting its impact on transitioning participants into quality jobs.

The discrepancy between employer commitment and actual job placements highlights a key area for improvement in this initiative. Addressing this challenge presents an opportunity for COSA to enhance the program's effectiveness and create more sustainable economic opportunities for program participants.

Performance Analysis:

The data reveals declining performance across key metrics when compared to historical benchmarks. Most notably, the conversion rate from enrollment to successful completion indicates a significant gap between program participation and achievement of desired outcomes. The decrease in performance metrics from Year 1 to present, combined with the current completion rate, suggests systematic challenges in program delivery and effectiveness.

Individual Barriers to Employment:

There are various contributing factors to the low percentage (35.5%) of WSA participants being placed into quality jobs.

a) *Age:* Older participants (45+) generally face more challenges, with a 38.7% quality job rate compared to 44.3% for those aged 25-44. Interestingly, this age barrier is less pronounced among WSA participants (39.1% vs. 38.6%).

b) *Justice Involvement:* This is a significant barrier, with justice-involved individuals having a 29% quality job rate compared to 44.6% for those not involved. The effect is even stronger among WSA participants (26.3% vs. 40.6%).

c) *Disability:* Participants with disabilities face substantial challenges, achieving a 24.2% quality job rate compared to 44% for those without disabilities. Again, this disparity is more pronounced among WSA participants (21.7% vs. 39%).

d) *Education Level:* Lower education levels correlate with lower quality job rates, with those having a high school diploma or less achieving a 40.9% rate overall, but only 36% among WSA participants.

e) *Previous Employment Status:* Those unemployed at enrollment face additional challenges, with a 40% quality job rate overall, dropping to 36.5% for WSA participants.

II. SYNC & TAR Analysis:

SYNC

Field types	*Free text, Binary, Numeric, Date, Single/Multi-select, Employee ID, Email*
Requirements	*150+ fields (37 critical for invoicing), daily reviews, real-time updates*

TAR

Structure	*8 sections, 69 questions, and 10 specific performance measures*
Methodology	*Primarily binary (Yes/No/N/A) with free text summary sections*
Funding Guide	*5 in 6 months (2024), plus the addition of a workflow guide*
Historical	*All RTW prime agencies have been under a Technical Assistance Review (TAR) or Performance Improvement Plan (PIPs) since the program's launch*

Analysis:

a) **Program Documentation System (SYNC):**
The Ready-to-Work program utilizes Supporting Your Needs in the Community (SYNC) for data management. The extensive data capture requirements of SYNC, which include over 150+ fields (37 of which are crucial for invoicing), daily reviews, and real-time updates, significantly increase operational demands. This level of data management imposes a substantial administrative burden on prime and subprime agencies, for whom Ready-to-Work is one of many program offerings.

While COSA schedules regular meetings with partners, changes to SYNC often occur with little to no advance communication and frequently misalign with COSA's own funding and workflow guides. The frequent funding guide revisions (at a rate of 5 in 6 months) and addition of workflow guides have introduced another layer of complexity to the data management process, negatively impacting program consistency and partner organizations' ability to adapt.

Moreover, modifications occur without corresponding scope of service and contract amendments creating programmatic inconsistency. During observations at C2 Global, case managers reported significant gaps in the COSA funding guide, leading them to create their own internal guide.

b) **Performance Evaluation Framework (TAR):**

The Technical Assistance Review (TAR) process, comprising eight (8) sections, sixty-nine (69) questions, and ten (10) specific performance measures, relies heavily on binary assessments. While free text summary sections allow for some nuanced feedback, the overall approach does not fully capture the complexities of program implementation. It is noteworthy that the 2023 evaluation process is based on a randomized sampling and limited direct observation by COSA. The Technical Assistance Review process exhibits misalignment with the scope of service agreement and contract parameters. A significant portion of the evaluation criteria being used to assess prime agencies' performance and compliance standards derives from retroactive changes to the funding guide, which either conflicts with or was never contractually agreed upon. These modifications, implemented without mutual agreement from all parties, raise substantive questions about the assessment framework altogether.

Ongoing Technical Assistance Reviews reveal persistent challenges in meeting performance standards since the program's inception. These challenges stem from COSA's frequent modifications to the funding guide, stringent compliance requirements, and system updates, further complicated by communication gaps. Agencies struggle with compliance standards that often seem misaligned with operational realities. This situation highlights the complexities in program implementation and the difficulties agencies face in adapting to changing requirements while maintaining service delivery.

III. Intake & Assessment:

Category	Metric
*Process capacity	120-150 intake assessments per month (average)
**Staff allocation	5 intake specialists
***Lead time per participant	7-30+ days (average)
Cycle time per assessment	1.0-1.5 hours
Participant lead verification	5-20 minutes
Required SYNC Fields	150+, 37 critical to invoicing
COSA compliance requirement	100%

*Process capacity: Maximum number of intake assessments completed in a set period under normal conditions.
**Cycle time: Total time to complete one intake assessment from start to finish.
***Lead time: Total time from initial participant contact to intake process completion.

Analysis:

A duplicative verification process significantly impacts the current process, leading to overprocessing, duplication, and extended wait times. For example, COSA provides 311 referrals of individuals interested in the RTW program, which COSA considers verified. However, due to contract language, C2 Global must still conduct and include the same verification in SYNC to avoid potential disallowed costs. This non-value-added activity increases processing time by an average of 5-20 minutes per lead, highlighting the need for streamlining and efficiency.

Capacity Calculation

a) 135 assessments (average) * 1.25 hours (average) = 168.75 hours per month

b) 168.75 hours / 5 specialists = 33.75 hours per specialist per month

Intake specialists dedicate approximately 21% of their standard work month (33.75 out of 160 hours) to assessments. However, this metric does not fully capture their comprehensive responsibilities. The remaining time encompasses critical, less quantifiable tasks essential to participant onboarding and program efficacy. To account for these additional duties, the analysis incorporates an estimated 1-15 hours per specialist per week. This adjustment provides a more accurate representation of the specialists' overall workload, acknowledging the considerable time invested in activities beyond assessments that are crucial to program operations.

Additional Workload Considerations:

- **Minimum additional time per specialist per month:**
  1 hour/week × 4 weeks = **4 hours**
- **Maximum additional time per specialist per month**:
  15 hours/week × 4 weeks = **60 hours**

Total Monthly Hours per Specialist:

- **Minimum scenario:**
  33.75 hours (assessments) + 4 hours (additional tasks) = **37.75 hours**
- **Maximum scenario:**
  33.75 hours + 60 hours = **93.75 hours**

Even in the maximum scenario, specialists utilize approximately 59% of their available working hours (93.8 out of 160). This suggests that while there is a substantial increase in workload when accounting for additional tasks, some capacity remains.

Additional Metrics:

a) <u>**Takt Time Calculation:**</u>

Category	Metric
Total available time per month:	5 specialists × 7 hours/day × 20 days/month = **700 hours/month**
Adjusting for additional tasks:	• Minimum additional tasks: 700 hours − (5 specialists × 1 hour/week × 4 weeks) = **680 hours** • Maximum additional tasks: 700 hours − (5 specialists × 15 hours/week × 4 weeks) = **400 hours**
Customer demand:	150 assessments per month (using the upper limit)
Takt Time	• Minimum additional tasks: 680 hours ÷ 150 assessments = **4.53 hours per assessment** (approximately 272 minutes) • Maximum additional tasks: 400 hours ÷ 150 assessments = **2.67 hours per assessment** (approximately 160 minutes)

*Takt Time: Rate at which assessments must be completed to meet participant demand.

b) <u>**Process Capability Index (Cpk):**</u> = min $((21 - 14) / (3 * 2.33), (14 - 7) / (3 * 2.33))$ = 1.00

Category	Metric
Upper Specification Limit (USL)	21 days
Lower Specification Limit (LSL)	7 days
Process Mean:	14 days
Standard Deviation	2.33 days

The process capability index (Cpk) is a statistical measure of a process's ability to meet demand. A Cpk of 1.00 indicates the process meets requirements exactly but allows no room for variability. This can lead to demand falling outside acceptable limits due to minor fluctuations or changes in a process. For consistent performance and to accommodate minor variations, a higher Cpk (ideally ≥1.33) is preferred.

Conclusion:

Including the additional tasks in the analysis reveals that under maximum workload conditions, the total time per assessment increases significantly:

Category	Metric
Maximum initial assessment time:	1.5 hours (90 minutes)
Maximum additional tasks per assessment:	15 hours/week ÷ 7.5 assessments/week = **2 hours per assessment** (120 minutes)
Total time per assessment:	90 minutes + 120 minutes = **210 minutes**

This total time per assessment of **210 minutes** exceeds the takt time under maximum additional tasks (160 minutes per assessment), indicating potential capacity constraints. This suggests that additional process steps or non-value-added activities are impacting efficiency, leading to longer overall lead times than initially indicated by the cycle time alone.

The process capability index **(Cpk) of 1.00** underscores the need to improve the intake process, as the ideal target is 1.50-2.00. This higher range indicates a process capable of meeting demand limits with room for variation. COSAs' strict compliance requirements coupled with participant challenges impact efficiency, contributing to the current low Cpk. Easing select compliance requirements could accommodate nominal variations, ensuring more consistent performance and enabling prime agencies to meet greater demand under fluctuating conditions. This approach could increase WSA efficiency and improve service delivery while maintaining essential compliance standards.

IV.   Case Management:

Process Type	Metric
Number of Case Managers	5
Case manager to participant ratio	1:300-350
Daily case workload expectation	30 cases
Engagement frequency	1-2 times monthly during training, monthly for six months post-placement

Engagement duration	*2-5 minutes during training, 30 seconds to 2 minutes post-placement*
Total contacts per participant	*7-13*
SYNC data entry time per participant	*4-5 hours over program duration*

Analysis:

The case management processes exhibit significant structural inefficiencies, primarily driven by rigorous compliance requirements and the complex needs of participants served by WSA. Analysis of program data reveals that WSA participants face measurably higher barriers than cohorts served by other prime agencies. These additional barriers further amplify the challenges inherent in the case management process.

Workload Calculation:

a) **Monthly Participant Engagement and SYNC Data Entry:**

- *Weighted Average Engagement Duration:* 2.72 minutes per interaction (65.4% × 3.5 minutes during training + 34.6% × 1.25 minutes post-placement)

- *Weighted Average Monthly Frequency:* 1.33 interactions per month (65.4% × 1.5 times during training + 34.6% × 1-time post-placement)

- *Total Monthly Engagement Time per Case Manager:* 19.61 hours (325 participants × 3.62 minutes ≈ 1,176.5 minutes)

- *Monthly SYNC Data Entry Time per Case Manager:* 121.88 hours (325 participants × 22.5 minutes = 7,312.5 minutes)

Total Required Time: 19.61 hours (engagement) + 121.88 hours (data entry) ≈ 141.49 hours

b) **Key Performance Indicator:**

Value Added Ratio (VAR) = 141.49 hours / 176 hours ≈ 0.80

*Value Added Ratio (VAR): A proportion of time required to complete all tasks versus total available working time; a VAR approaching 1 indicates high utilization, potentially leading to overwork and reduced capacity for additional tasks.

The VAR of 0.80 indicates that case managers are dedicating approximately 80% of their available working hours to required tasks, leaving limited time for unforeseen circumstances or in-depth support to program participants. The significant amount of time spent on data entry (approximately 69% of

total working hours) further constrains the ability to provide comprehensive, tailored support to participants facing significant barriers.

The substantial contact mandates by COSA create undue pressure, resulting in cursory interactions that fail to address participant barriers. The disproportionate amount of time devoted to data entry exacerbates this issue, limiting case managers' capacity to engage meaningfully with participants.

The case management framework demonstrates an unsustainable system where excessive compliance demands compromise program effectiveness. The current process heightens staff burnout risk and turnover, leading to higher error rates, rework, and increased lead time.

V. Invoice Processing Performance Overview:

Process Type	Metric
Invoice revision rate	63.6%
Process efficiency:	36.3%
Average revisions per invoice	1.45
Monthly time allocation for invoice-related tasks	616 hours (30% of fiscal staff capacity)
Monthly cost associated with invoice revisions	$41,047.85
Funding guide update frequency	5 times in 6 months

Analysis:

Analysis of the current invoice processing system reveals significant inefficiencies. Only 36.3% of invoices are processed correctly on the first attempt, resulting in a high volume of rework. This inefficiency impacts both internal operations and external partner processes.

Four primary areas of impact:

a) *Resource Allocation:* Fiscal staff dedicate 30% of their capacity to invoice-related tasks, which represents a substantial portion of time spent on administrative processes rather than strategic initiatives.

b) *Financial Impact:* The monthly cost of $41,047.85 for invoice revisions indicates a significant financial burden associated with the current process inefficiencies.

c) *Partner Challenges:* The high revision rate (63.6%) and frequent funding guide updates (5 in 6 months) suggest that subprime organizations face ongoing difficulties in navigating SYNC and COSA compliance requirements.

d) *Operational Efficiency:* With a process efficiency of just 36.3%, the current system operates well below optimal levels, impacting the speed and quality of program delivery.

While communication between WSA and COSA has continued to improve, the existing data management system (SYNC) and communication processes continue to present challenges for prime and subprime partners. These difficulties impact not only operational efficiency but also the overall quality and effectiveness of the program. WSA partner organizations spend considerable time correcting errors in SYNC to ensure that COSA can process invoices.

The frequent updates along with the high number of data entry requirements are key contributing factors to a high error rate and resource allocation to invoice-related processing.

VI.   RTW Reimbursement Model:

The reimbursement model for the RTW program, established more than three years ago, was likely based on standard practices in program management and workforce development. However, as the program has grown and the system and processes established by COSA have increased, so has the need for additional resources to meet those increasing demands.

One critical aspect that must be considered in the reimbursement model is the extensive effort required to place participants into quality jobs within the mandated 6-month timeframe. This process involves several essential activities following a participant's graduation from an approved training program:

- Job matching
- Soft skill development
- Resume development
- Interview preparation
- Participant follow-up
- Engagement with local employers

These activities represent only a fraction of the partners' total effort to ensure successful job placements. The depth and breadth of these services are crucial to participants' success and significantly impact partner organizations' workload.

COSA's strict 100% compliance requirement places a significant burden on partner organizations. This forces them to absorb additional costs and establish internal processes to meet stringent program requirements. Furthermore, the purpose and utilization of the collected data remain unclear, potentially limiting funding for process enhancements and partners' ability to add necessary resource gaps.

Placing participants into quality jobs within the allotted six (6) months is complex and challenging. Partners must match participants with suitable opportunities in a rapidly changing job market, offer

ongoing support for job retention, and manage nuanced compliance requirements. These efforts add complexity to the partners' roles within the current reimbursement model.

As the RTW program continues to evolve, the reimbursement model's effectiveness in supporting program goals and partner efforts will need to be reevaluated to ensure the program's long-term sustainability, adaptability, and overall success.

Recommendations:

1. COSA Compliance Requirements:

Summary: Negotiate with COSA for a tiered compliance system to maintain 100% compliance for critical data only while allowing flexibility for less crucial elements to reduce partner burden and enhance program effectiveness.

COSA's current 100% compliance requirement, though well-intentioned, imposes an excessive burden on partner organizations and inadvertently compromises the program's overall effectiveness. It is recommended that during the upcoming subcontractor contractor renegotiations, WSA proactively negotiate to reevaluate and refine these requirements, advocating for a more balanced approach to compliance. This revised strategy can maintain rigorous standards to ensure accountability while providing necessary operational flexibility.

A potential compromise is the implementation of a tiered compliance system. Under this framework, critical data points—such as those essential for invoicing—would maintain 100% compliance, while less crucial elements could adhere to a modestly relaxed standard. This nuanced approach would significantly reduce pressure on partners, potentially enhancing data quality by enabling a focused emphasis on the most vital elements while preserving the program's fundamental integrity.

By adopting this more balanced compliance strategy, WSA can alleviate the strain on partner organizations without compromising the program's core objectives. This approach has the potential to improve data accuracy, strengthen partnerships, and enhance the overall effectiveness of the program. As WSA moves forward with contract negotiations, prioritizing this flexible yet robust compliance model will be crucial in ensuring the long-term success and sustainability of the program.

2. Streamline Invoicing Process and Enhance Communication:

Summary: Streamline invoicing and improve communication by enhancing SYNC usability and implementing a more structured communication and change management framework, addressing challenges from frequent updates and compliance requirements.

Due to the high compliance requirements imposed by COSA, constant changes to the SYNC platform, frequent funding guide revisions, and inconsistent communication, WSA has experienced significant

challenges in invoice processing. To address these issues and improve efficiency, we recommend implementing a two-pronged approach:

- First, critical fields in the SYNC system should be marked as required or highlighted with asterisks, providing clear visual cues to users, and reducing the likelihood of errors. This simple yet effective change could dramatically reduce the error rate and subsequent rework at the partner level.

- Second, WSA proposes that funding guide changes and related communications be limited to quarterly, with a minimum 30-day advance notice period prior to any major system updates and/or changes. This quarterly cycle, while more aggressive than standard government practices, suits the Ready-to-Work program's iterative nature and need for responsive adaptations. This recommendation is consistent with federal and state policy change processes, particularly in its use of advance notice periods.

  Any changes outside this quarterly schedule should require consortium agreement before implementation. For necessary rapid changes, partner organizations should receive no less than 21-day notice period prior to implementation. This structured yet flexible approach to change management would allow partners to better prepare for and adapt to system updates, reducing confusion and improving overall efficiency while balancing standard practices with the program's unique operational needs.

3. Cost-Benefit Analysis:

Summary: Engage a third-party professional service to perform an in-depth cost-benefit analysis to determine an equitable reimbursement model.

WSA is requesting that the City of San Antonio (COSA) obtain third-party professional services contract for a comprehensive cost-benefit analysis to determine an equitable reimbursement model for WSA and partner organizations. This study would assess the full spectrum of program delivery costs, including administrative expenses, from initial intake through job placement and long-term follow-up. It would identify any discrepancies between current expenditures and reimbursements while also evaluating the financial implications of COSA's requirements and the potential impacts of proposed compliance changes. This analysis will provide crucial insights into the programs' economic ecosystem, equipping prime agencies with empirical data to engage COSA in informed discussions about fair compensation. Such discussions will aim to establish a model that accurately reflects both the intrinsic value and operational costs of our partners' essential work. This initiative will optimize resource allocation, enhance program effectiveness, and ensure the long-term sustainability of our collaborative efforts.

4. Process Analysis:

Summary: Engage an impartial third-party mediator to evaluate Ready to Work program processes and establish balanced operational framework that optimizes both compliance and performance.

WSA is requesting that the City of San Antonio (COSA) obtain an impartial third-party mediator to conduct a comprehensive examination of the Ready to Work (RTW) program's processes. The current framework has created operational challenges, which have been routinely communicated, stemming from the need to balance rigorous compliance requirements with performance objectives. This has resulted in gaps between COSA's procedural requirements, and the operational realities faced by WSA and other prime agencies in delivering program services effectively.

A third-party evaluation would examine how compliance mechanisms and performance standards, as established in the contract and scope of services, could be harmonized to better serve program objectives. This systematic assessment would identify opportunities to streamline processes while maintaining necessary oversight, ultimately developing recommendations for operational protocols that support both compliance requirements and performance goals. The evaluation would provide an objective foundation for developing implementation strategies that honor contractual obligations while optimizing service delivery effectiveness across all prime agencies.

Conclusion:

The Ready to Work (RTW) program stands at a critical crossroads. The analysis reveals systemic operational challenges that significantly hinder the program's effectiveness and strain partner resources. These issues, ranging from intake to job placement, result in suboptimal performance across key metrics.

Central to these challenges are operational inefficiencies, including overburdened case managers and cumbersome invoice processing. The current process and financial models fail to adequately capture program complexities, while stringent compliance requirements and frequent system updates further impede partner organizations.

To address these issues, we propose a three-pronged approach:

1) Ease compliance requirements to reduce administrative burden.

2) Streamline processes and communication to enhance operational efficiency.

3) Review the reimbursement model to better align with program realities.

Implementing these recommendations will require a collaborative effort and open dialogue with COSA. By doing so, we can create a more agile, responsive, and effective program.

As we move forward, continuous evaluation, inter-agency collaboration, and adaptability will be crucial. Through these targeted improvements, the RTW program can better fulfill its mission, serving

as a robust catalyst for workforce development in Greater San Antonio and potentially offering a model for similar initiatives nationwide.

MEMORANDUM

To:	Executive Committee
From:	Adrian Lopez, CEO
Presented by:	Gabriela Navarro Garcia, Controller
Date:	March 7, 2025
Regarding:	Ready to Work Update

SUMMARY: On November 3, 2020, City of San Antonio (COSA) voters approved the SA: Ready to Work ballot initiative, authorizing a 1/8th cent sales and use tax for four years to provide workforce development training and higher education to unemployed, underemployed, or underserved residents to obtain high-demand, well-paid careers, by Chapter 379A of the Texas Local Government Code ("the Better Jobs Act"). No further action has been requested at this time.

ANALYSIS: Under this initiative, Workforce Solutions Alamo (WSA) executed an agreement with the city of San Antonio to provide the services necessary to the SA Ready to Work program (the "Program"), which includes the following objectives: increase access to industry-recognized certification training and college; provide wraparound services and emergency funding to ensure successful completion of training and career placement; increase collaboration within the workforce ecosystem; and promote accountability and adaptability throughout the process.

FISCAL IMPACT: The award amount for this contract is One Hundred Five Million, Seven Hundred Eighty-One Thousand, Nine Hundred Fifty-Three Dollars ($105,781,953), and it is funded through a grant by COSA. The term of this agreement began on May 13, 2022, and will be for a three (3) year period unless sooner terminated in accordance with the provisions of the Agreement.

FISCAL UPDATE: The WSA fiscal department has served as a fiscal agent for Ready to Work partners. This memo is intended to provide an update on the current program's financial performance and challenges.

Expenditure Update:
WSA has budgeted $65,554,565 through May 31, 2025. WSA has expended $28,808,996 through December 31, 2024

Board Profit in FY25 quarter one has decreased by $72,639 since FY24. The significant variance is in Board Expenses. Board expenditures have increased since FY24 by $194,255. High expenditure is reflected mostly in salaries and temporary staffing services. The increase in allocated hours to the program is an impact of the new software transition and increase in training invoice processing.

The board currently has a surplus of $69,628 reserved for monitoring questioned costs.

Ready to Work Rollforward			
	FY22 & FY23	**FY24**	**FY25 Q1**
BOARD COST			
Revenue Fees Earned	$ 628,967	$ 1,323,365	$ 1,444,981
Expenditures	$ 575,735	$ 1,181,098	$ 1,375,353
Net Surplus	**$ 53,232**	**$ 142,267**	**$ 69,628**
SUBRECIPIENT COST			
Revenue Fees Earned	$ 5,033,040	$ 11,119,697	$ 13,114,440
Expenditures	$ 5,033,040	$ 11,119,697	$ 13,114,440
Net	$ -	$ -	$ -
CLIENT COST			
Revenue-Cost- Reimbursment	$ 6,649,175	$ 13,009,412	$ 15,676,481
Expenditures-Cost Reimbusement	$ 6,649,175	$ 13,009,412	$ 15,676,481
Net	$ -	$ -	$ -

Program Challenges and Opportunities

Ready to Work is an evolving program, and the board continues to work through any program challenges by presenting common-sense solutions, focusing on opportunities to strengthen the program and achieve success for program recipients, providers, partners, and COSA.

One of the most significant challenges WSA faced was cash flow management.

To alleviate this challenge, fiscal staff work together with the Ready to Work team provide cash advance of $3,610,731. We currently have paid back $3,219,536 in alignment with our payment plan, expected to pay in full by March 15, 2025.
COSA has updated the funding guide to allow submission of accrual invoices to receive payment earlier than the historical 60-90 days.

WSA has forecasted to spend $36,083,524 though the inception of the 3-year contract, leaving a budget surplus of $29,471,041.

3-Year Contract Budget	**Forecasted Expenditures**	**Budget Surplus**
$65,554,565.00	$36,083,523.95	$29,471,041.05

The board staff looks forward to continually working with the city to proactively identify and work through any challenges that may occur and will work to strengthen the financial and programmatic program performance.

MEMORANDUM

To:	Executive Committee
From:	Adrian Lopez, CEO
Presented by:	Gabriela Navarro Garcia, Controller
Date:	March 7, 2025
Regarding:	Client Expenditure Analysis

SUMMARY: *Update and Possible Discussion on Support Services with TWC Programs and Ready to Work Funds.*

The Board continues to monitor and analyze client support services for the fiscal year to identify the most common barriers for job training and job placement. The analysis will be utilized to have ongoing discussions with our partners to identify additional resources for our clients.

ANALYSIS:

From July 2024 to December 2024, a total of $1,318,331 has been expensed for support services to assist our clients. Rent, transportation and utilities continue to have the highest costs for support services.

TWC Programs – there was a significant increase of $98,757 in rent support. Overall expenses increased approximately $239,827 from October 2023 to June 2024 Reporting

Client Expenditure Analysis - TWC Programs as of December 2024 (6 Months)		
Category	**YTD Actuals**	**%**
Work Related	$ 110,584	10.60%
Rent	$ 376,140	36.05%
Utilities	$ 60,134	5.76%
Transportation	$ 358,036	34.32%
Incentives	$ 91,256	8.75%
Youth - Support Services	$ 47,185	4.52%
TOTAL:	$ 1,043,335	100.00%

Ready to Work –A total of $134,743 has been utilized to support in rent payments for our clients. Overall expenses increased approximately $61,051 from June 2024 Reporting

Client Expenditure Analysis - Ready to Work as of December 2024 (6 Months)		
Category	YTD Actuals	%
Rent	$ 134,743	49.00%
Utilities	$ 68,518	24.92%
Transporation	$ 19,380	7.05%
Laptops/Computers	$ 30,766	11.19%
Training Related	$ 2,202	0.80%
Other	$ 19,387	7.05%
TOTAL:	$ 274,996	100.00%

ATTACHMENT:

Client Expenditure Analysis

Workforce Solutions ALAMO
BUILDING BUSINESS · BUILDING CAREERS

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Other	$ 19,387	7.05%
TOTAL:	$ 274,996	100.00%

MEMORANDUM

To:	Executive Committee
From:	Adrian Lopez, CEO
Presented by:	Gabriela Navarro Garcia, Controller
Date:	March 7, 2025
Regarding:	County by County Expenditure Analysis

SUMMARY: *Update and Possible Discussion on Service Delivery Expenditure by County*. The preparation of the annal budget considers allocation factors, under Texas Administrative Code, Chapter 800, Chapter B, Allocations. These allocations provide guidance in allocating funds by each county within the Service Delivery Area. TWC awards contracts in aggregate amounts to the Alamo region, requiring the board to serve participants throughout the region.

Upon request of local officials, the board continues to analyze expenditures by County to ensure that each county is receiving a fair share of the fund's allocation by state allocation factors.

ANALYSIS: The board has evaluated the initial budget allocation, year-to-date expenditures, and year-to-date variance analysis for each county. The budget and actual expenditures percentages through December 31, 2024, for Bexar and Rural Counties can be found in Table 1.

Table 1:

	TWC Programs			Child Care Funds			Other Funding		
	Actuals	Budget	Actuals %	Actuals	Budget	Actuals %	Actuals	Budget	Actuals %
Urban	3,754,447	4,784,544	77%	29,267,611	27,169,521	84%	500,295	784,018	80%
Rural	1,149,293	1,576,627	23%	5,639,860	5,406,639	16%	127,940	243,677	20%

Bexar County has a slight decrease from budget to actual for the TWC Programs. WSA's allocations are based on guidance from the TAC 800, actual expenditures are based on needs of a community.

There was a slight increase in the percentage allocated to Bexar County for Child Care. Overall 82% expenditures were allocated to Bexar county and 18% to the Rural counties, representing less than 1% variance from the straight-line budget.

FISCAL IMPACT: The board will continue to monitor expenditure by county and work collaboratively with service providers to ensure proper outreach is being conducted in all counties to make funds and services available.

ATTACHMENTS:

YTD County by County Expense to Budget Comparison Report

County by County Expense Report - FY25 YTD Straight- Line Budget
December 31, 2024

Counties	TWC Programs		Child Care Funds		Other Funding		Total	
	Budget	Percentage %	Budget	Percentage %	Budget	Percentage %	Budget	Percentage %
ATASCOSA	$ 161,683.59	2.54%	$ 583,790.26	1.79%	$ 20,113.91	1.96%	765,587.76	1.92%
BANDERA	$ 70,841.22	1.11%	$ 135,910.94	0.42%	$ 11,868.22	1.15%	218,620.38	0.55%
BEXAR	$ 4,784,543.66	75.21%	$ 27,169,521.28	83.40%	$ 784,017.80	76.29%	32,738,082.73	81.92%
COMAL	$ 307,138.65	4.83%	$ 824,546.41	2.53%	$ 52,131.89	5.07%	1,183,816.94	2.96%
FRIO	$ 108,180.09	1.70%	$ 275,245.67	0.84%	$ 12,220.47	1.19%	395,646.24	0.99%
GILLESPIE	$ 62,743.30	0.99%	$ 207,390.17	0.64%	$ 11,310.01	1.10%	281,443.48	0.70%
GUADALUPE	$ 313,459.08	4.93%	$ 1,538,786.40	4.72%	$ 46,112.37	4.49%	1,898,357.85	4.75%
KARNES	$ 80,804.87	1.27%	$ 216,311.79	0.66%	$ 10,498.86	1.02%	307,615.51	0.77%
KENDALL	$ 135,616.79	2.13%	$ 259,577.54	0.80%	$ 21,239.40	2.07%	416,433.73	1.04%
KERR	$ 111,319.57	1.75%	$ 608,207.40	1.87%	$ 17,380.64	1.69%	736,907.61	1.84%
MCMULLEN	$ 20,548.50	0.32%	$ 10,693.01	0.03%	$ 4,148.22	0.40%	35,389.73	0.09%
MEDINA	$ 97,595.95	1.53%	$ 466,305.20	1.43%	$ 17,441.54	1.70%	581,342.69	1.45%
WILSON	$ 106,695.11	1.68%	$ 279,874.11	0.86%	$ 19,211.42	1.87%	405,780.64	1.02%
	$ 6,361,170.38	100.00%	$ 32,576,160.18	100.00%	$ 1,027,694.76	100.00%	$ 39,965,025.31	100.00%

County by County Expense Report Actuals - December 31, 2024

Counties	TWC Programs		Child Care Funds		Other Funding		Total	
	Expenditures	Percentage %	Expenditures	Percentage %	Expenditures	Percentage %	Expenditures	Percentage %
ATASCOSA	153,316.08	0.38%	784,580.88	2.27%	5,952.55	0.63%	943,849.51	2.33%
BANDERA	62,316.01	0.76%	107,604.69	0.34%	2,570.53	0.37%	172,491.23	0.43%
BEXAR	3,754,447.06	71.77%	29,267,610.72	82.57%	500,295.22	81.74%	33,522,353.00	82.90%
COMAL	327,867.07	9.26%	1,077,067.91	3.38%	42,735.40	5.70%	1,447,670.39	3.58%
FRIO	144,026.08	2.12%	320,853.42	0.82%	8,288.65	1.19%	473,168.15	1.17%
GILLESPIE	55,594.91	0.81%	153,615.74	0.38%	0.00	0.00%	209,210.64	0.52%
GUADALUPE	12,469.56	3.17%	1,465,930.27	4.70%	26,922.47	3.78%	1,505,322.29	3.72%
KARNES	49,730.83	1.24%	84,739.54	0.15%	0.00	0.34%	134,470.38	0.33%
KENDALL	82,660.29	1.76%	257,870.92	0.84%	9,593.18	1.53%	350,124.39	0.87%
KERR	118,113.63	2.60%	470,412.19	1.55%	23,100.84	2.95%	611,626.66	1.51%
MCMULLEN	3,473.43	0.00%	0.00	0.00%	0.00	0.00%	3,473.43	0.01%
MEDINA	44,424.91	1.54%	620,557.03	1.85%	8,776.00	1.44%	673,757.94	1.67%
WILSON	95,300.04	1.93%	296,627.67	1.14%	0.00	0.34%	391,927.70	0.97%
	4,903,739.90	100.00%	34,907,470.97	100.00%	628,234.84	100.00%	40,439,445.71	100.00%

*This expenditures exclude Bexar County only funds which includes: City of San Antonio, Non Custodial Parent, Military Family, Student Hireability Navigator, VRS Paid Work Experience, Training and Employment Navigator, and High Demand Job Training