



## **OVERSIGHT COMMITTEE MEETING**

Workforce Solutions Alamo  
100 N. Santa Rosa St., Suite 120, Boardroom  
San Antonio, TX 78207

**November 13, 2023**

**9:00 AM**

### **AGENDA**

*Agenda items may not be considered in the order they appear.*

Citizens may appear before the Committee to speak for or against any item on the Agenda in accordance with procedural rules governing meetings. Speakers are limited to three (3) minutes on each topic (6 minutes if translation is needed) if they register at the beginning of meeting. Questions relating to these rules may be directed to Caroline Goddard at (210) 322-6296.

***The Chair of the Committee will be at the Host Location. The Host location is specified above. Meetings will be visible and audible to the public at the Host location, and there will be a visual or audio recording of the meeting. There will be two-way audio and video of the meeting between each Board member sufficient that Board members and public can hear and see them. WSA will comply with all Videoconferencing Guidelines.***

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**During the Public Comments portion of the meeting (Agenda Item 4), the Public may type their name into the chat box or unmute themselves and state their name. The meeting host will call each member of the public for comments, in the order their names were submitted.**

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- I. CALL TO ORDER  
Presenter: Dr. Sammi Morrill, Committee Chair
- II. ROLL CALL AND QUORUM DETERMINATION  
Presenter: Dr. Sammi Morrill, Committee Chair
- III. DECLARATIONS OF CONFLICT OF INTEREST  
Presenter: Dr. Sammi Morrill, Committee Chair
- IV. PUBLIC COMMENT  
Presenter: Dr. Sammi Morrill, Committee Chair
- V. CONSENT AGENDA (DISCUSSION AND POSSIBLE ACTION)  
Presenter: Dr. Sammi Morrill, Committee Chair
  - a. Meeting Minutes – October 6, 2023
- VI. BRIEFING: QUALITY ASSURANCE (DISCUSSION AND POSSIBLE ACTION)  
Presenter: Dr. Ricardo Ramirez, Director of Quality Assurance
  - a. TWC Annual Monitoring
    - i. Draft Plan for Responses
  - b. Quality Assurance Update
  - c. Monitoring Outcomes and Technical Assistance
  - d. TWC Performance – Claimant Reemployment Within 10 Weeks
- VII. BRIEFING: PROGRAMS & OPERATIONAL (DISCUSSION AND POSSIBLE ACTION)  
Presenter: Teresa Chavez, COO
  - a. Performance, Programs, and Operational Updates
- VIII. CEO REPORT  
Presenter: Adrian Lopez, CEO
  - a. Ready to Work Monitoring
- IX. CHAIR REPORT  
Presenter: Dr. Sammi Morrill, Committee Chair
- X. EXECUTIVE SESSION:  
Pursuant to Chapter 551 of the Texas Open Meetings Act, the Committee may move into Executive Session for discussion on any issue for which there is an exception to the Act as set out in section 551.071 et. seq. including, but not limited to, the following:
  - a. Government Code §551.072 – Discussions Regarding Purchase, Exchange, Lease, or Value of Real Property if Deliberation in an Open Meeting Would Have a Detrimental Effect on the Position of Workforce Solutions Alamo in Negotiations with a Third Party;
  - b. Government Code §551.071 – All Matters Where Workforce Solutions Alamo Seeks

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- the Advice of its Attorney as Privileged Communications Under the Texas Disciplinary Rules of Professional Conduct of the State Bar of Texas;
- c. Pending or Contemplated Litigation;
  - d. Government Code §551.074 – Personnel Matters Involving Senior Executive Staff and Employees of Workforce Solutions Alamo; and
  - e. Government Code §551.089 – Discussions Regarding Security Devices or Audits.

XI. ADJOURNMENT

Presenter: Dr. Sammi Morrill, Committee Chair



## **OVERSIGHT COMMITTEE MEETING - MINUTES**

Workforce Solutions Alamo  
100 N. Santa Rosa St., Suite 120, Boardroom  
San Antonio, TX 78207

**October 6, 2023**

**9:00 AM**

**BOARD OF DIRECTORS:** Dr. Sammi Morrill (Chair), Leslie Cantu, Esmeralda Perez (9:06am), Allison Greer Francis (9:16am)

**STAFF:** Adrian Lopez, Adrian Perez, Gabriela Navarro Garcia, Penny Benavidez, Jessica Villarreal, Jeremy Taub, Randy Davidson, Chuck Agwuegbo, Dr. Ricardo Ramirez, Sou Khamsourivong, Rebecca Espino Balencia, Kristen Rodriguez, Vanessa McHaney, Manuel Ugues, Brenda Garcia, Daisey Vega, Sylvia Perez, Angela Bush, Sandra Rodriguez, Victoria Rodriguez, Gabriela Orr, Christine Dever, Chakib Chehadi, Roberto Corral

**PARTNER STAFF:** None.

**LEGAL COUNSEL:** None.

**GUEST:** Carley Reeves Hernandez

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I. CALL TO ORDER

Presenter: Dr. Sammi Morrill, Committee Chair

**At 9:00am, Chair Dr. Sammi Morrill called the meeting to order.**

II. ROLL CALL AND QUORUM DETERMINATION

Presenter: Dr. Sammi Morrill, Committee Chair

**The roll was called, and a quorum was declared present.**

III. DECLARATIONS OF CONFLICT OF INTEREST

Presenter: Dr. Sammi Morrill, Committee Chair

**None.**

IV. PUBLIC COMMENT

Presenter: Dr. Sammi Morrill, Committee Chair

— Carley Reeves Hernandez is a parent of a toddler who attended Mossrock KinderCare, one of the childcare facilities in the WSA TRS program with a 4-star rating. She stated that she sewed a recording device into her 20-month old's jacket. She noticed a change in her behavior and weight loss. She states that the recording device captured 7 hours of two particular daycare workers hitting her daughter and other children, calling them names, and refusing to feed them, along with using foul language. Ms. Hernandez contacted Child Care Investigations but they would not make an abuse file because her daughter couldn't speak to confirm the events on the recording. She also contacted HHSC, DFPS, and NAEYC (National Accreditations). Chair Dr. Sammi Morrill thanked Carley Reeves Hernandez for her comments and ensured that they will be taken seriously, and staff will follow up on this.

V. CONSENT AGENDA (DISCUSSION AND POSSIBLE ACTION)

Presenter: Dr. Sammi Morrill, Committee Chair

a. Meeting Minutes – August 4, 2023

**Upon motion by Leslie Cantu and seconded by Allison Greer Francis, the Committee unanimously approved the Consent Agenda item a. Meeting**

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## Minutes – August 4, 2023.

### VI. BRIEFING: PROGRAMS & OPERATIONAL (DISCUSSION AND POSSIBLE ACTION)

Presenter: Teresa Chavez, COO

#### a. Performance, Programs, and Operational Updates

- MPR Quarterly Performance Updates: WSA is currently meeting or exceeding performance targets for 2023 TWC Contracted Measures, except Claimant Reemployment within 10 weeks. WIOA for DW credential rate is at 90.24% which is at risk, but more accurate numbers will be in once the final report is received. WIOA Youth median earnings at Q2 post exit is 94.1% which meets performance but is at risk. WIOA C&T credential rate is at 95.47% which meets performance but is at risk. Reemployment and employer engagement for Claimant Reemployment within 10 weeks is currently failing at 93.35%. WSA has identified issues with the going back to work numbers and TWC has been notified and are working on this.
- Childcare performance is at 106.75%. TWC performance was set at 11,427 for FY23 and current YTD for FY23 is 12,050. The Alamo region number of CCS/TRS early learning centers is at 30%. The total number of programs in both rural and urban areas are 1,047, total number of CCS programs are 567, and total number of TRS programs are 170.
- Training and Employment Navigator Pilot: Target enrollment was 12, Q6 active enrollments are 47, and total YTD participants served are 92. Chair Dr. Sammi Morrill asked about the budget for this grant since the participants being served are four times the amount of the target. COO Teresa Chavez stated that since this is a pilot program that is for those at risk for sex trafficking or have been sex trafficked, no participant will be turned away. Even though 92 participants have been served, these are all the participants being accounted for even if they are only coming for resources or even if they did not complete training. The allowable costs for this grant are anything needed for self-sufficiency.
- SEAL: \$240,918.82 earned with 22,944.5 hours worked. TWC target was 256, total enrollments were 364, 184 completed work readiness training, 221 were placed in jobs, 152 completed five weeks of work, and 4 participants were offered permanent employment.
- Teacher Externship: Target was 160 teachers in 25 ISDs and 139 educators completed. The award was increased by \$106,000 to serve an additional 39 teachers. Next steps are to expand rural district participation.
- Student HireAbility Navigators: Attended the State Transition Conference from July 16 – 19<sup>th</sup> in San Antonio. Discussions included Charting the Course and Next Steps to Independence. Conversations and strategic planning continue for the 2<sup>nd</sup> Annual Alamo Hire Event on October 12, 2023, at the Data Point Career Center. Planning continues for the November 2, 2023, Alamo Helping Hands Resource Collaboration Event with Southside First/Women's Unlimited at the South Flores Career Center. Career Exploration Day is being planned in collaboration with Vocational Rehabilitation for January 2024 at the New

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Braunfels Career Center.

- Military Family Support Program: Strengthening partnership with JBSA and braiding Ready to Work. 5 new enrollments, 2 in training, and 6 given support services.
- Workforce Commission Initiatives: Hiring Red, White & You! is the Veteran's Job Fair to be held on November 2<sup>nd</sup> from 9am to 2pm at the Expo Hall B Freeman Coliseum, Texas Veterans Leadership Program provides support to TVLP staff at South Flores and Walzem centers, and Career in Texas Industries held its last two events in September.
- RESEA: Per the last TWC report, the monthly reporting is at 93.6% which exceeds the 80% completion rate required for boards in BCY23.
- WIOA Youth Enrollments to Date: Urban enrollments for both in and out of school youth are at 121%, rural enrollments for both in and out of school youth are at 365%, occupational and vocational training are at 85%, work experience at 126%, supportive services at 387%, and GED services at 186%. Current work experience agreements are at 177, 449 positions available, 140 participant enrollment target, and 177 current participants enrolled to date. Youth budget is on track with the contractor meeting at 94%. Youth work experience totals earned are \$661,273 with 177 youth participants. The largest job sectors are government and education.
- Jobs Ya'll Youth Career Events: Past events were held in Seguin and San Antonio in September. The San Antonio event had 136 youth in attendance from 7 SAISD schools with 7 employers.
- FY24 Youth Career Exploration: January 19 and 26, 2024 will be an urban event cohosted with UP Partnership at Northeast Lakeview College targeting 1,000 youth, January 2024 will also have a rural event cohosted with Seguin EDC at Seguin City Coliseum targeting 800 youth, April 2024 will be an urban event at Alamo College District targeting 400 youth, September 2024 will be a rural event in Atascosa County targeting 400 youth. Additional youth events are being explored with key partners with dates and times to be determined.
- Ready to Work Program: 3,625 WSA applicants have been interviewed, 1,968 have been case managed and enrolled in training, 230 completed training, and 105 have been placed in quality jobs. Top trainings being selected are healthcare, IT, and construction.
- Aspen Workforce Leadership Academy: This is a 10-month process and the Fellows have finished colab 4 and are about to go into colab 5 where they are drafting recommendations to develop change strategies. The Fellows are in 4 working groups with the first group working on measures and outcomes, specifically on the Ready to Work program, the second group is working on employer education focusing on untapped talent, the third group is working on partnerships within the workforce ecosystem, and the fourth group is working on strategic navigation as it appears in the workforce ecosystem. On December 4, the Fellows will be having a stakeholder pitch meeting discussing their research and topics.

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VII. BRIEFING: PROCUREMENT (DISCUSSION AND POSSIBLE ACTION)

Presenter: Jeremy Taub, Director of Procurement and Contracts

a. Contract Summary and RFP Updates

- Summary of procurement bid projects in process: Postage Meter Machines is under contract, Access Control Equipment is open with an anticipated award date in October, Walzem Lease Property Search is under contract, Kerrville Lease Property Search is under evaluation with an anticipated award date in January 2024, Teacher Externships is in progress with an anticipated award date in January 2024, Hondo Lease Property Search is in progress with an anticipated award date in December, and CFO Staff Augmentation Services is pending award with an anticipated award date in October.

VIII. BRIEFING: QUALITY ASSURANCE (DISCUSSION AND POSSIBLE ACTION)

Presenter: Dr. Ricardo Ramirez, Director of Quality Assurance

a. Quality Assurance Update & TWC Audit Resolution

- The four items listed in the TWC Audit Resolution have been resolved and are now closed.
- TWC's annual monitoring will start on October 10<sup>th</sup> through the 20<sup>th</sup>.
- TWC has also started its Equal Opportunity (EO) monitoring.

b. Monitoring Outcomes and Technical Assistance

- All monitoring engagements for the year both through the external monitor and QA have been completed at 100%.
- TANF/Choices – C2 GPS has an 82.08% accuracy rate. Three items highlighted for continuous improvement are timely and reasonable attempts, timely communication of participant status changes to HHSC, and recording of/reporting participant employment outcomes.
- WIOA Youth – SERCO is 100% complete and in the process of issuing the final report.
- SNAP Annual (Slant) Review – C2 GPS has a 92.1% accuracy rate. Three items highlighted for continuous quality improvement are eligibility on verification requirements, data entry on service tracking information, and data entry on program detail information.
- Chair Dr. Sammi Morrill asked about the continuous improvement and what the reporting back expectation is. Dr. Ricardo Ramirez stated that they will meet with the programs team and the partner to review each of the items for improvement. He stated that they will be monitoring the internal controls to assist with training or technical assistance. Chair Dr. Sammi Morrill asked to have the discussion on QA at the beginning of the meeting.
- HHSC has started monitoring SNAP E&T fiscal transactions. The fiscal department will report the project to the Audit & Finance Committee.
- 95% of the digitizing paper records project is complete.

c. TWC Performance – Median Earnings at Q2

- Each year, TWC contracts require boards to meet or exceed performance targets. Three of these measures include reporting median Q2 earnings for Adult, Dislocated Worker, and Youth. These measures are tied to participant income

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from employment activities. WSA uses TWC's MPR to determine outcomes. WSA attaches TWC's performance to partner contracts and ties these to their profits. WSA has consistently met or exceeded the measures.

IX. RURAL PARTNERSHIP UPDATE (DISCUSSION AND POSSIBLE ACTION)

Presenter: Adrian Perez, CIO

- The establishment of County Workforce Councils has begun through a process of Community Conversations. The second meetings are underway with the third round of meetings being planned.

X. CHANGES TO BOARD OF DIRECTORS COMPOSITION (DISCUSSION AND POSSIBLE ACTION)

Presenter: Adrian Perez, CIO

- TWC released WD 21-23 on September 1, 2023, that required the additions of a representative of the childcare workforce. WSA and partner staff are working to ensure a slate is nominated and presented to the Committee of Six on December 6<sup>th</sup> to include an additional private sector position to maintain the mandated 51% balance of private sector representation.

XI. CEO REPORT

Presenter: Adrian Lopez, CEO

a. Ready to Work Monitoring

- The City of San Antonio has completed their monitoring and WSA is waiting on the results, however, it looks like there will not be any questionable costs.

XII. CHAIR REPORT

Presenter: Dr. Sammi Morrill, Committee Chair

None.

XIII. EXECUTIVE SESSION:

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- b. Government Code §551.071 – All Matters Where Workforce Solutions Alamo Seeks the Advice of its Attorney as Privileged Communications Under the Texas Disciplinary Rules of Professional Conduct of the State Bar of Texas;
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None.

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XIV. ADJOURNMENT

Presenter: Dr. Sammi Morrill, Committee Chair

**Upon motion by Leslie Cantu and seconded by Esmeralda Perez, Chair Dr. Sammi Morrill adjourned the meeting at 10:09am.**

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## MEMORANDUM

To: Oversight Committee  
From: Adrian Lopez, CEO  
Presented by: Ricardo Ramirez, Director of Quality Assurance  
Date: November 13, 2023  
Subject: Briefing – TWC Annual Monitoring

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**SUMMARY:** Quality Assurance’s briefing of TWC’s Annual Monitoring for the WSA Board of Directors. The item does not require Board action.

### **TWC Annual Monitoring**

*Annual Monitoring:* TWC conducted its Annual Monitoring and completed the onsite testing (performed in a hybrid format) from October 10<sup>th</sup> through the 24<sup>th</sup>. TWC provided an Exit Conference with an accompanying Exit Report on the 24<sup>th</sup>.

### **TWC Initial/Draft Exit Conference Report**

TWC’s Exit Conference Report cited the following items. Please note that the report is in an initial or draft format, meaning that the items may or may not be included (or adjusted) in the Final Report.

- **Fiscal Disbursements – this is a prior year (repeat) finding:**
  - *Syndicate Wave – Procurement Consultant:*
    - Extension of the duration of the original scope of work (from four months to 16 months);
    - Increase of costs beyond the RFP/contract terms (from \$20,700 to \$76,212).
    - TWC’s comments:
      - May result in potential questioned costs.
      - Extending work beyond the original scope of the solicitation is, generally, seen as bypassing the standard of full and open competition.
  - *Martin & Drought – Legal:*
    - Increase of costs beyond the RFP/contract terms (from \$90,000 to \$110,000 annually).
    - Direct payments for services to Caldwell East & Finlayson, PLLC (Martin & Drought’s subcontractor).
    - TWC’s comments:
      - May result in potential questioned costs.
      - Extending work beyond the original scope of the solicitation is, generally, seen as bypassing the standard of full and open competition.

- **Leases – this is a prior year (repeat) finding.**
  - *Marbach Workforce Center:*
    - Needs determination not dated.
  - *San Antonio Food Bank:*
    - Initial needs determination and market assessment not dated.
    - One needs determination was dated after the effective date of the agreement.
    - Market analysis conducted after the effective date of the agreement.
  - *Port Authority of San Antonio:*
    - Initial needs assessment not dated.
    - One needs assessment dated after the lease’s effective date.
  
- **Procurements:**
  - *Professional Development Training Services for Childcare Providers:*
    - Conflict of Interest (COI): Missing a COI for one evaluator.
  - *Mechanical Services (Handyman):*
    - Missing independent estimate of the needs assessment section.
  
- **Personal Identifiable Information (PII):**
  - *Note: PII is confidential or sensitive information that must be properly protected.*
  - TWC Walkthrough at the Marbach Workforce Center:
    - Lack of barriers to cover/secure PII at the reception desk.
    - Unsecured emails and passwords in staff cubicle.

**Next Steps**

- TWC Audit Resolution may issue an “Initial Resolution Notification” with administrative findings or questioned costs.
- WSA will have 45 calendar days from issuance of the notification to respond.

**Procurement Items (item “VI. a. i.”)**

WSA Procurement includes a presentation of the items that TWC included in their Exit Report.

**FINANCIAL IMPACT:** Potential questioned costs.

**ATTACHMENTS:** TWC’s Exit Conference Report.

## Workforce Solutions Alamo Exit Conference Report Project #24.20.0001

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**To:** Board's Staff, Other Representatives, & TWC Monitoring Team  
**From:** Ernesto Cantú, Project Manager  
**Date:** October 24, 2023  
**Time:** 2:30 PM  
**RE:** Exit Conference Report with the Workforce Solutions **Alamo**

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### I. Introductions & Sign-In:

Please enter your name, title, and department in Teams "Chat Box" section. Please distinguish between Board or subrecipient.

### II. Scope

The scope of this review encompassed the program year beginning August 1, 2022, through July 31, 2023.

### III. Issues and Documentation

**Fiscal: This is a prior year finding.**

#### Syndicate Wave-

- The Board procured the provider and executed a contract commencing April 4, 2022, to July 31, 2022, and not to exceed \$20,700. The contract was extended from August 1, 2022, to August 31, 2022. The contract was again extended from September 1, 2022, to July 31, 2023 (1 year), increasing by \$56,212 to \$76,212. When the original project and contract was completed, the next segment of the project should have been procured. By extending work beyond the original scope of the solicitation is, generally, seen as bypassing the standard of full and open competition. This may result in a potential question cost.

#### Martin & Draught –

- The contract provided for a one-year agreement and four one-year options to renew; the original procurement was not to exceed \$90,000 and the total contract with options was \$450,000. For the third one-year renewal option of the contract (10/1/2022 to 9/30/2023), the contract was increased to not to exceed \$110,000. In addition, the Board also paid Martin & Draught's subcontractor, Caldwell East & Finlayson, PLLC, directly for services. Extending work beyond the original scope of the solicitation is, generally, seen as bypassing the standard of full and open competition. This may result in a potential question cost.

#### **Procurements:**

##### **Conflict of Interest**

In one procurement tested, the Board did not ensure one Professional Development Training Services for Childcare Providers evaluator had a signed Conflict of Interest.

##### **Independent Estimates**

In one procurement tested, the Board did not maintain documentation to support an independent estimate was conducted.

#### Mechanical Services (Handyman)-

- The independent estimate section of the needs assessment is blank.

**Leases: This is a prior year finding.**

## **Workforce Solutions Alamo Exit Conference Report Project #24.20.0001**

In three leases tested, the Board did not ensure its needs determinations and market assessments were dated. In addition, for two leases tested, the Board did not maintain documentation to support a market analysis was conducted prior to contract issuance.

### Marbach Workforce Center-

- The needs determination is not dated.

### San Antonio Food Bank-

- The initial needs determination and the market assessment are not dated. During the review, the Board provided a second needs determination dated 6/19/23, which was after the effective date of the agreement on 1/1/22. In addition, the market analysis was conducted on 10/5/23, which was also after the effective date of the agreement.

### Port Authority of San Antonio-

- The initial needs assessment provided by the Board was not dated. During the review, the Board provided a second need assessment dated 4/3/23, which was after the lease was effective on 2/9/22.

*Note: The Board provided a Memorandum for Record dated 10/4/23, stating an audit was conducted and gaps in needed areas of improvement for the three leases were identified.*

### **Board:**

#### Personal Identifiable Information (PII):

A walkthrough of the Marbauch center was conducted and as a result the following was noted:

- The Board has no barriers in place to cover and secure the PII information from the public that a new customer is entering into the computer at receptionist desk.
- During the walkthrough, a notebook with emails and passwords belonging to a staff who was out, was found unsecured in an empty cubicle.

Issues and potential questioned costs identified in this report may require additional research regarding the status as findings and the final amount of costs. Therefore, we will continue communications with Board staff, as necessary, after our return to Austin. If circumstances warrant, an issue may be removed from this review and addressed in a subsequent special review. Findings from previous reports that are still in process with TWC Audit Resolution may be included in this year's report as a prior year issue.

### **IV. Reporting Process:**

You will receive a report of our findings, if any, upon completion of our fieldwork. The Executive Director (or appropriate representative for non-Board reviews) will be provided a courtesy copy of the final report twenty-four (24) hours prior to its dissemination. If the review results in no issues identified, a management letter will be issued, and the review closed. (40 T.A.C. 802.65(a))

### **V. Resolution Process:**

After issuance of the monitoring report, TWC Audit Resolution will issue you an Initial Resolution Notification regarding administrative findings and questioned costs noted in the report. The monitored entity will have 45 calendar days from the issuance of the Initial Resolution Notification to respond. (40 T.A.C. 802.65(b)(1) and (2)).

Administrative Findings: If administrative findings are resolved based on the responses to the Initial Resolution Notification, a monitoring closure letter is issued. (40 T.A.C. 802.65(b)(1)(A)). Unresolved administrative findings remain open; TWC's Audit Resolution Department will continue to work with the monitored entity until the next scheduled review to ensure follow-up. ((40 T.A.C. 802.65(b)(1)(B))

## **Workforce Solutions Alamo Exit Conference Report Project #24.20.0001**

Questioned Costs: If questioned costs are resolved based on the responses to the Initial Resolution Notification, a monitoring closure letter is issued. (40 T.A.C. 802.65(b)(2)(A)). Unresolved questioned costs will result in the issuance of an Initial Determination. (40 T.A.C. 802.65(b)(2)(B)).

### **VI. Special Requests:**

Special requests for or any of the following areas can be facilitated by the Subrecipient Monitoring Department or in conjunction with other departments.

**A. Monitoring Technical Assistance** – For monitoring tools, procedures and training: informal or formal.

Contact person is: Alma I. Gonzalez, Training Coordinator/Monitoring TA  
Telephone: (512) 936-2513 (O); (512) 755-5546 (C); Fax: (512) 936-3517  
Email: [alma.gonzalez2@twc.texas.gov](mailto:alma.gonzalez2@twc.texas.gov)

**B. Fiscal Technical Assistance** – For answers to financial questions, you may email TWC fiscal technical assistance workgroup at [Fiscal.ta@twc.texas.gov](mailto:Fiscal.ta@twc.texas.gov)

**C. Program Technical Assistance Requests:**

Applicable Contract Manager: Tangela Niemann  
Email: [tangela.neimann@twc.texas.gov](mailto:tangela.neimann@twc.texas.gov)

Workforce Policy & Program Assistance:  
Email [wfpolicy.clarifications@twc.texas.gov](mailto:wfpolicy.clarifications@twc.texas.gov)

### **VII. Customer Service**

The Subrecipient Monitoring Department strives to continually improve our processes and procedures. As such, a *Customer Satisfaction Survey* will be provided to the Executive Director. We would greatly appreciate your time in completing the survey and returning it to:

**Charles E. Ross, Jr.,**

Director

Fraud Deterrence and Compliance Monitoring Division

Email: [chuck.ross@twc.texas.gov](mailto:chuck.ross@twc.texas.gov)

### **VIII. Closing Remarks & Questions**

## Workforce Solutions Alamo Exit Conference Report Project #24.20.0001

### IX. Acknowledgement

The purpose of the exit conference report is to provide monitored entities, upon completion of the on-site review, a written record of potential issues and questioned costs which could be included in the monitoring report. It also documents one of our primary goals; assurance that entities we monitor are provided daily feedback, verbally and/or in writing as requested by the entity, throughout the duration of the on-site review.

Signatures below acknowledge that the TWC team gave frequent verbal and written updates on the status of the monitoring visit. It also acknowledges that the Board understands that the issues identified may be written as findings in the TWC Monitoring Report. ***The signature below does not acknowledge agreement or disagreement with the issues noted, merely that the issues and potential questioned costs were communicated during the course of the review.***

DocuSigned by:  
  
ADRIAN LOPEZ

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Executive Director or Designee

10/27/2023

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Date

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TWC SRM Project Manager

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Date



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**Charles E. Ross, Jr.**  
Director, Division of Fraud Deterrence and Compliance Monitoring  
Texas Workforce Commission

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Date





**Workforce Solutions Alamo  
Exit Conference Report  
Project #24.20.0001**

**Sign-In Sheet**

**PLEASE PRINT CLEARLY**

	<b>Name</b>	<b>Job Title</b>	<b>Organization Name</b>
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MEMORANDUM

**To:** Oversight Committee  
**From:** Adrian Lopez, CEO  
**Presented by:** Jeremy Taub, Director of Procurement and Contracts  
**Date:** November 13, 2023  
**Subject:** Draft Plan for Responses

**Summary:** This report is intended to summarize procurement processes and improvements the Board is implementing to increase controls related to contracts and leases.

In October 2023, the annual TWC monitoring review of procurement was performed to ensure historical procurements were completed following policies and procedures. During the monitoring, several areas were identified as impacting WSA’s compliance with the procurement process. As a result, the Board is reviewing its strengthening of contracts, policies, procedures, and additional tools to implement the recommendations by TWC.

Full and open competition is a basic tenet of public purchasing. It promotes public opportunity to compete for publicly funded awards without concern for partiality and preferential treatment. It also promotes the accomplishment of fair and reasonable prices through market competition. Actions that restrict or limit competition can erode public trust, result in award protests, reduce suppliers’ willingness to respond to solicitations, and lessen or eliminate the achievement of cost-effective pricing through market influence.

The Texas Workforce Commission, TWC monitors indicated that the Board may have improperly amended two (2) contracts by adding services to the existing scope and increasing costs not provided for by the original proposal solicitation and contract documents. Additionally, it was noted that documentation for two of the Boards leases wasn’t dated properly.

**Update:** The table below is intended to summarize the procurement items notated in TWC monitoring report:

Item	Area of Concern	Issue
Legal Services Contract	Amended to increase the budget	The contract exceeded the budget of \$90,000 annually
Procurement Consultant Contract	Extended and increased scope of the contract and increased the budget	The contract exceeded budget of \$20,700 over a four-month period
Lease – San Antonio Food Bank	Needs Determination and Market Assessment were improperly dated.	Needs Determination and Market Assessment were dated after lease execution.
Lease – Port Authority San Antonio	Needs Determination and Market Assessment were improperly dated.	Needs Determination and Market Assessment were dated after lease execution.

1. Legal Services Contract - The original Contract Value is not to exceed \$90,000, which may be amended pursuant to section 1.8 of the RFP; Workforce Solutions Alamo reserves the right to vary or change the terms of any contract resulting from this RFP, including funding levels, scope of work, performance measures, adding other related programs or services and funding sources, and shortening or extending the contract period, as it deems necessary and in the best interests of Workforce Solutions Alamo. The original contract value excluded a budget for non-routine matters, which caused the contract to be amended.
2. Procurement Consultant Services - In October 2022, the Board sought to amend the contract with The Syndicate Wave to enable implementation of their recommendation plan and provide ongoing support services for an increased cost of \$56,212.72. The Board felt that continuing the services with The Syndicate Wave was in its best interest as the contractor, having specialized knowledge at this point, was well familiarized with TWC and Board policy and procedures. In a review of the original proposals submitted, an analysis further supports that based on the proposed hourly rates and the estimated number of hours needed to complete the amended scope of work, continuing with The Syndicate Wave was the most cost-effective.

Therefore, rather than rebid Phase II, the Board elected to contract the additional services with the Syndicate Wave beyond what the original RFP and contract indicated. The Board took this action to amend the contract for Procurement Consultant Services to maintain business continuity. The action taken by the Board enabled the Procurement Director to implement policies and procedures while focusing on hiring highly trained experienced staff.

3. Leases – The monitoring review recently conducted by TWC noted that required Needs Determination and Market Analysis for two of the Board’s leases weren’t dated properly for the San Antonio Food Bank and the Port San Antonio locations. The Needs Determination and Comparative Market Assessment (CMA) is completed for every procurement that we request for properties. The assessments were added to our Lease Policy and Procedures following last year’s audit review and from the direction provided by TWC Audit Resolution to have more concise and detailed documentation that clearly shows that the Board has demonstrated proper compliance. Compliance with the aforementioned is pending final review and determination by TWC.

**TWC Recommendations:** The Board should strengthen controls over amending contracts. The Board should adhere to the requirements of the FMGC and work with TWC Audit Resolution on amending contracts. Subject to an entity’s own procurement procedures, a Board may amend contracts so long as the solicitation document and contract clearly defines the conditions and dollar amount for which the contract can be amended. Amending contracts beyond the original scope, length, and amount is not permitted unless provided for in the original contract.

**TWC Lease Recommendation:** The Board has proactively started to implement the recommendations by TWC and TWC’s Audit Resolution unit to cure the non-compliant leases before any future lease renewals. After meeting with TWC, the Board will continue to take the following steps to cure potential findings:

- WSA will perform a lease-by-lease summary of each property to ensure the required documentation is properly dated to align with the recent implementation of WSA lease procedures and tools.
- TWC does not request WSA to break any lease but expects WSA to perform a complete and transparent procurement before exercising any renewal options on a current lease.

As an outcome of the recommendations and technical assistance provided, the Board shall take the following steps and will provide regular updates to the Board as developments progress:

- Develop expenditure tracking processes and reporting monitor budget spend rates to prevent exceeding unauthorized contracted expenditures.
- Revise Standard Operating Procedures to outline the conditions for amending contracts, including proper procedures adding additional services that were not originally procured.
- The Board staff will conduct a subsequent internal review of all property leases. This process will further analyze the existing leases to ensure they align with the TWC's Financial Manual for Grants Contracts, and WSA Lease Procurement procedures. In addition, this process will ensure that documentation is properly dated and on file for each one of the Boards leases.

**Additional Controls Over Expiring Contracts:** TWC has recommended that the Board review and strengthen controls to ensure contracts are renewed or reprocured promptly and appropriately. Procurement has developed a contract management database that is updated regularly by reviewing contract expiration dates and in addition to any other contract-related action.

Procurement and Contracts utilizes e-procurement software to issue automated reminders to contract end users for necessary action requirements on renewing and expiring contracts. Additionally, procurement staff performs follow up with end users individually for status updates. This follow-up process creates an opportunity for collaboration, training, and development throughout the agency.

**Agency-Wide Procurement Improvements:** In March 2022, the Board contracted with The Syndicate Wave, LLC to address the prior year's TWC recommendation, listing procurement as an area of concern. The independent consultant assessed the procurement area, identifying several required vital control needs. The Board had contracted with The Syndicate Wave, LLC to assess, recommend, and implement agency-wide improvements to the procurement and contract management process. This includes strengthening controls by updating policies and implementing standard operating procedures.

The outcome of the assessment resulted in the identification of key risk control areas of capacity, governance, and process effectiveness. The Syndicate Wave, LLC scope and contracted course of action is to recommend, enhance, and implement the following agency-wide:

- Procurement staff will coordinate with the Fiscal department, Programs and Operations, and Quality Assurance as appropriate to obtain necessary information to complete the amendment.
- Improve Procurement Governing Practices and Enhancing Best Practices
- Capacity Building and Strengthening Policy & Procurement System(s) Performance
- Procurement checklists and other tool kits to improve efficiency and effectiveness.

- Contract Compliance and Monitoring
- Standardization of Procurement Planning, Timeline, Requirements, and Operating Procedures
- Records Management Policies (including the utilization of electronic storage)
- Vendor Diversity Outreach Policy Improvements (SMWVBE/HUB)
- Procurement of Professional Development Recommendations and Training
- Support Audit reconciliation activities and any “Cure” actions

WSA and The Syndicate Wave, LLC collectively finalized all enhancements and actively implemented these new policy and procedures recommendations. WSA is committed to conducting procurement acquisitions to the maximum extent practical, in a manner providing full and open competition consistent with the standards detailed in the Financial Manual for Grants and Contracts (FMGC), Texas Workforce Commission Procurement Supplement, Grant Management Common Rule, and Uniform Grant Management Standards (2 CFR 200).

**Next Steps:** Procurement and Contracts Management will continue proactively monitoring compliance, embracing a continuous process improvement culture, implementing the recommendations from TWC, integrating an internal quality assurance process, and implementing the recommendations from the Syndicate Wave.

**Timeline:** The procurement process improvements have remained ongoing since October 2022, and are anticipated to continue indefinitely.

**Fiscal Impact:** Strengthening controls will ensure full compliance and guard against future questioned costs, which none exist for the monitoring review. Additionally, these controls will yield more significant contract negotiation positions.

**Attachments:** None

## MEMORANDUM

To: Oversight Committee  
From: Adrian Lopez, CEO  
Presented by: Ricardo Ramirez, Director of Quality Assurance  
Date: November 13, 2023  
Subject: Quality Assurance Update

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**SUMMARY:** Quality Assurance’s briefing of current monitoring activities for the WSA Board of Directors. The items do not require Board action.

### TWC Monitoring

*Annual Monitoring:* QA and Procurement is reporting this item separately.

*Equal Opportunity (EO) Monitoring:* TWC started its EO monitoring. Ms. Caroline Goddard, WSA’s Equal Opportunity Officer, leads the engagement. WSA has submitted most or all of the documentation – we have not received a draft or final report.

*Child Care and Development Fund (CCDF):* TWC completed data validation testing as required by the U.S. Department of Health and Human Services Administration for Children and Families. TWC issued a Final Letter on August 31, 2023. The testing resulted with no errors or concerns with improper payments. Child Care Board staff reports the item to the Early Care & Education Committee.

### Other Monitoring Activities

*Office of Child Care (OCC):* TWC informed WSA that the Office of Child Care’s (OCC) Texas Monitoring Review will perform monitoring of the CCDF. Child Care Board staff will report the engagement to the Early Care & Education Committee.

*Health & Human Services Commission (HHSC):* HHSC has started monitoring SNAP E&T fiscal transactions. WSA received an initial engagement letter on September 14<sup>th</sup>. The fiscal department will report the item to the Audit & Finance Committee.

### WSA External Program Monitoring (Ms. Christine Nguyen, CPA)

- *WIOA Youth:* 100% complete, with a 95.5% overall accuracy rate. The report highlights the following items for continuous quality improvement:
  - *Support Services:*
    - Included a reimbursement to WSA of \$34.13 for one participant;
    - Documenting availability of other resources before issuing support services (87.5% accuracy rate);
    - Needs assessment form not completed (87.5% accuracy rate);

- Recording information in TWIST Support Service TAB and Counselor Notes (50%).
- *Incentives:*
  - Included a reimbursement to WSA of \$50.00 (one participant exceeded the \$250 max);
  - Failure to outline incentive criteria in writing for the participants before its commencement (83.33% accuracy rate).
- *Performance Outcomes:*
  - Recording of Measurable Skills Gains (MSGs) and Employment outcomes in TWIST (68.18% accuracy rate).

#### *Program Monitoring Contract Renewal*

- WSA is renewing Ms. Nguyen’s contract for one additional year. This is the first of a four-year renewal option.
- TWC has Certified Ms. Nguyen’s monitoring for WSA, and her team successfully completed all monitoring engagements for FY22-23.

#### **WSA Internal QA Program Monitoring**

- *Reemployment Services & Eligibility Assessment (RESEA):* 100% complete with an overall accuracy rate of 93.3%. The report highlighted two items for continuous quality improvement:
  - *Individual Employment Plan*
    - Missing a specific employment goal (72.0% accuracy rate),
    - Updating the plan’s review date (25.0% accuracy rate).
- *SNAP E&T and Non-Custodial Parent (NCP) Technical Assistance (TA):* TWC has closed the audit reports. Programs/Operations staff and QA will continue offering support (e.g., so that the associated items do not become “repeat” findings).

#### **WSA Other Activities**

- *Digitizing Paper Records:* 100% complete, led by Trema Cote, WSA Workforce Monitor. Center staff have digitized all participant hard-copy paper records.
- *Technical Assistance (TA):* Supporting WSA departments and subrecipients with TA for areas with low accuracy rates, policy development, and other supports.

#### **STAFF RECOMMENDATIONS:**

TWC requires Boards to have qualified monitoring staff to carry out the Board’s oversight responsibilities. Continue supporting WSA’s QA department to promote the agency’s integrity and continuous quality improvement efforts.

**FINANCIAL IMPACT:** WSA’s External Program Monitoring contract with Ms. Christine Nguyen, CPA: \$170,054. We expect the funds to increase as we include additional grants for monitoring.

**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.



## MEMORANDUM

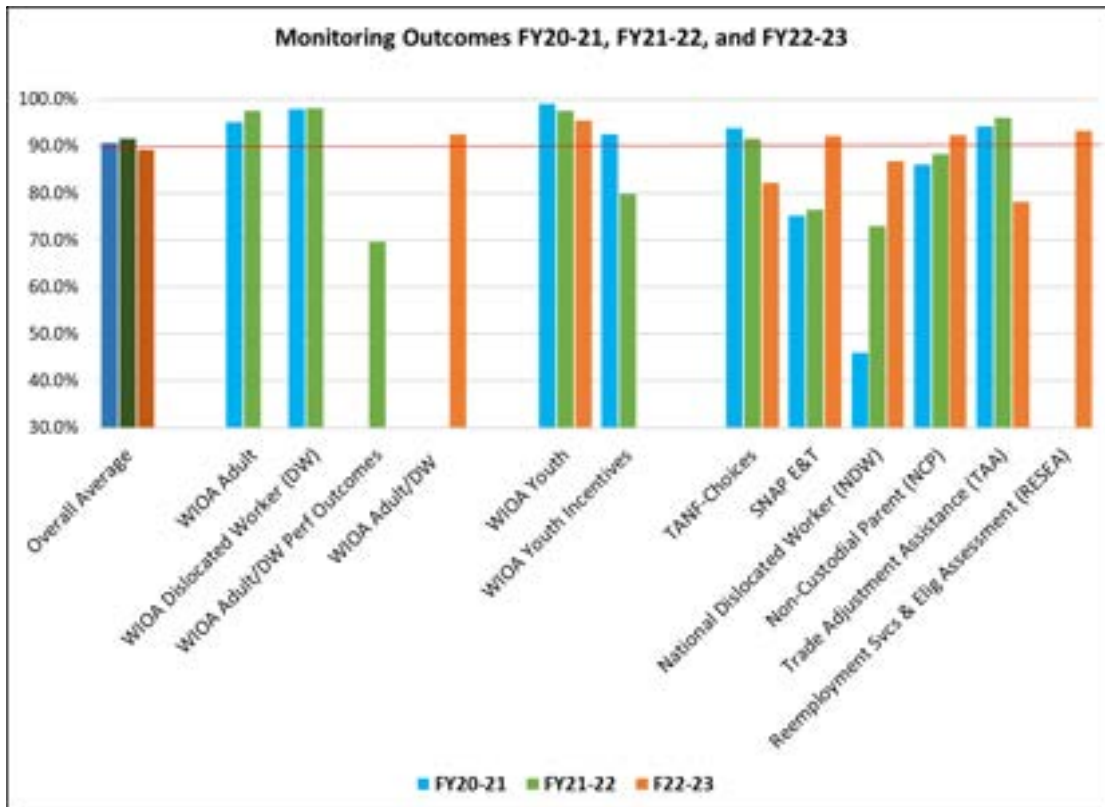
To: Oversight Committee  
 From: Adrian Lopez, CEO  
 Presented by: Ricardo Ramirez, Director of Quality Assurance  
 Date: November 13, 2023  
 Subject: Monitoring Outcomes and Technical Assistance

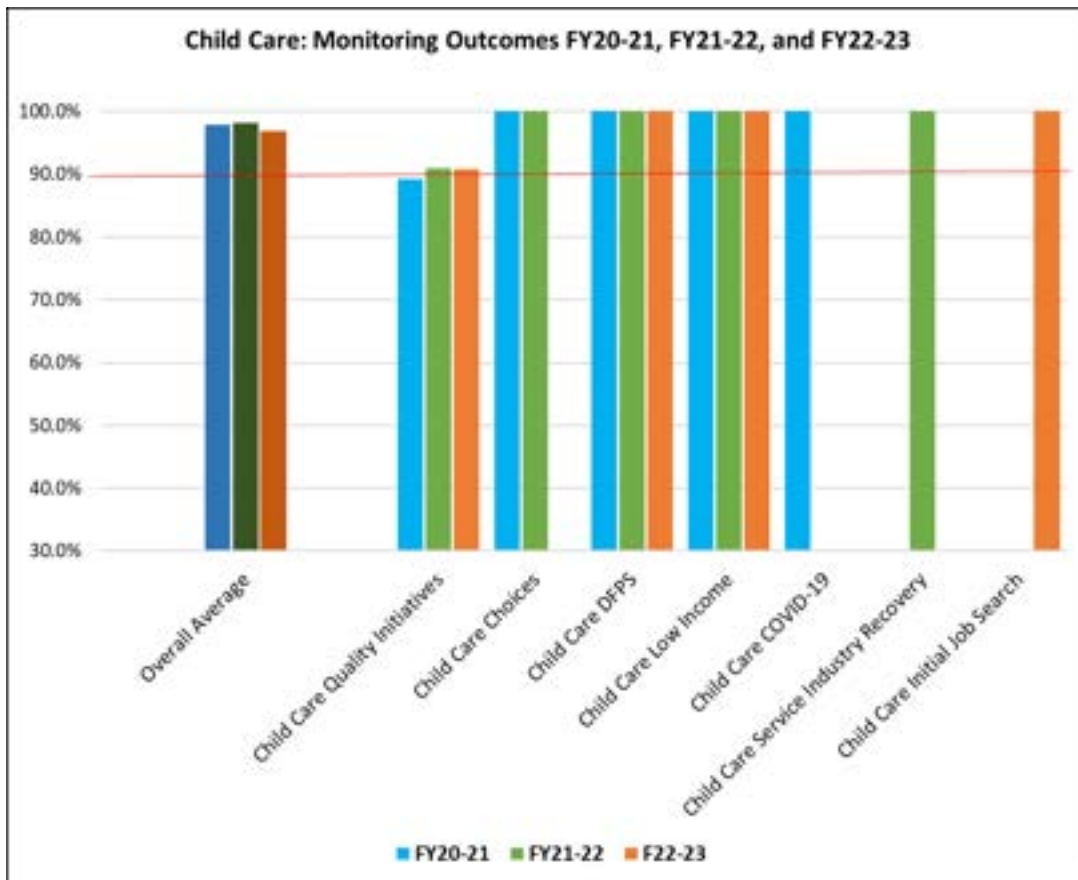
**SUMMARY:** This memorandum presents a summarized version of monitoring outcomes for the year. We also include information tied to providing technical assistance (TA). The briefing does not require Board action.

### Monitoring Outcomes

The table below compares monitoring outcomes for Fiscal Years 2020-2021, 2021-2022, and 2022-2023 (Oct-Sep timeframe). The red line at 90% represents the minimum expected accuracy rate threshold. We updated the figures to include:

- WIOA Youth and Reemployment Services and Eligibility Assessment (RESEA).





### Background

Board staff offers partners technical assistance (TA) when outcomes fall below expected goals. TA plans include several components, such as:

- updating policies and procedures,
- training,
- additional monitoring,
- increased oversight,
- documenting measurable progress.

Successful strategies require the identification of root causes and the implementation of adequate actions. Successful strategies result in accuracy rates equal to or greater than 90% (e.g., for each attribute we test). Successful outcomes aim to prevent questionable costs, improper performance reporting, and individual issues from turning into ‘repeat’ findings.

### Technical Assistance

QA works with the Programs/Operations team to highlight monitoring areas needing continuous quality improvement:

- While an overall accuracy rate for a single engagement may exceed the 90% threshold, one or more of the attributes that we test may fall below the threshold.

- Attributes that fall below the 90% threshold prompt intervention in the form of technical assistance (e.g., including process improvements).

The most recent program monitoring reviews having attributes with accuracy rates less than 90% include:

- TAA, WIOA Youth, WIOA Dislocated Worker/Adult, TANF/Choices, SNAP E&T and NCP.
- The SNAP E&T and NCP TWC Audit Resolution attributes have been resolved; however, QA will continue supporting Programs/Operations to ensure WSA retains compliance.

TWC has placed WSA in an informal performance improvement action plan for the following measures:

- WIOA Dislocated Worker performance (Measurable Skills Gains and Credential Rate).

**STAFF RECOMMENDATIONS:** TWC requires Boards to have qualified monitoring staff to carry out the Board's oversight responsibilities. Continue supporting WSA's QA department to promote the agency's compliance, internal controls, and continuous quality improvement efforts.

**FINANCIAL IMPACT:** Not applicable.

**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.

## MEMORANDUM

To: Oversight Committee  
From: Adrian Lopez, CEO  
Presented by: Ricardo Ramirez, Director of Quality Assurance  
Date: November 13, 2023  
Subject: TWC Performance – Claimant Reemployment Within 10 Weeks

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**SUMMARY:** This memorandum presents the role and definitions of TWC-contracted performance measures. TWC contracts boards for two *Reemployment & Employer Engagement Measures (REEMS)*, one of which includes the Claimant Reemployment within 10 Weeks (“Claimant Reemployment”).

### Definition

Based on work search reemployment requirements, the measure calculates the percentage of monetarily eligible (eligible to receive UI benefits) and registered unemployment insurance (UI) claimants who gain employment within ten (10) weeks. The performance period runs from July 1<sup>st</sup> to June 30<sup>th</sup>.

### Goal

Dislocation from work decreases household income, which increases poverty and income inequality. Further, unemployed workers represent untapped labor market potential, negatively impacting regional economic activity. The Claimant Reemployment measure aims to help affected workers quickly gain employment.

### Methodology

*Denominator:* The number of monetarily eligible, initial claimants subject to work search requirements and active in WIT during the ten weeks before or after the initial determination of monetary eligibility.

*Numerator:* The unduplicated number of persons from the denominator reemployed within ten weeks of the date their claim is first determined monetarily eligible or (if there was no WIT service in the ten weeks before the monetary eligibility date), the date of the first WIT service after determining them as monetarily eligible.

### **Sources**

TWC records reemployment using:

- Hires with a WIT Job Opening or WIT Job Development,
- Supplemental Records of Employment (recorded by Center staff in WIT, TWIST, or New Hire Data), or
- Claim data (employment reported by claimants or cessation of benefit certification filing in less than ten weeks when eligible for more than ten weeks of benefits).

### **Exemptions**

TWC exempts claimants under the following conditions:

- WIOA exclusions (e.g., death, institutionalization, or health issue of at least 90 days, active duty recalls, etc.),
- Enrollment in Dislocated Worker or Trade Adjustment Assistance (TAA) training designed to result in a recognized degree or credential during the ten weeks, or
- The UI Division determined the claimant ineligible for benefits or not subject to work search requirements for three (3) consecutive weeks or the claimant does not receive benefits for the entire 10-week period.

### **Reporting**

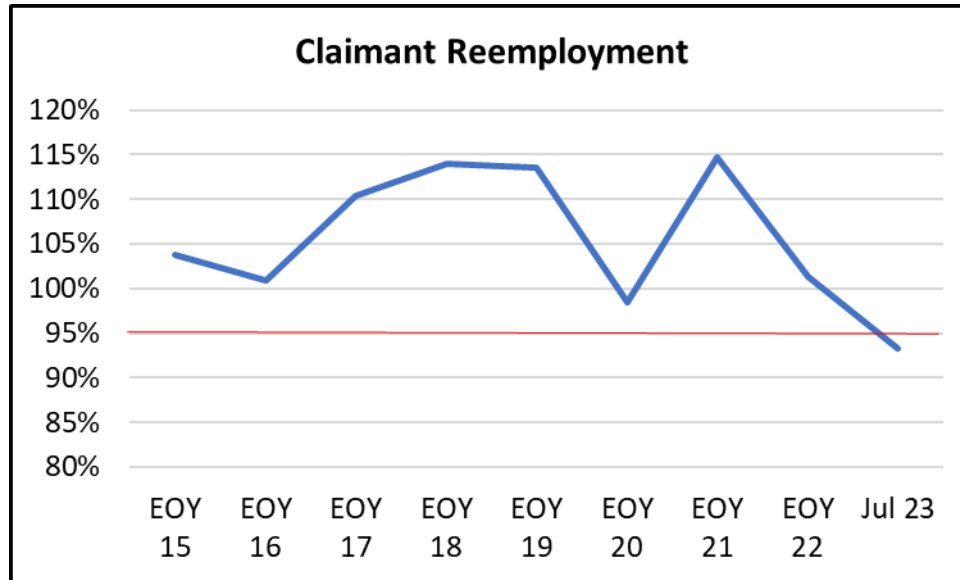
TWC reports the year-end performance in the September Monthly Performance Report (MPR).

### **Work Search Requirements**

Early each year, the WSA Board of Directors approves the weekly work search requirements for each county in the region.

### **Current and Historical Outcomes**

The following figure reports TWC's Monthly Performance Report (MPR) outcomes from the End-of-Year (EOY) 2015 to July 2023. Except for this current year, WSA has consistently met or exceeded the TWC target.



*Meeting = 95%. Source TWC's MPR.*

**STAFF RECOMMENDATIONS:** TWC requires Boards to meet or exceed TWC-contracted performance measures as contracted to service providers. The Board staff recommends a continued focus on the measures.

**FINANCIAL IMPACT:** WSA subrecipient contracts include TWC-performance goals as part of their profit. TWC may sanction Boards that fail to meet performance. TWC Sanctions (or 'Intent' to Sanction) may limit the Board's eligibility for TWC Annual Awards (monetary or other), and different types of sanctions may carry additional requirements. WSA also often reports performance outcomes when applying for grants, which can negatively impact successful bidding.

**STRATEGIC OBJECTIVE:** The Workforce Innovation and Opportunity Act (WIOA) sets out expectations for the Wagner-Peyser Act-funded Employment Service (ES) program to support the reemployment of UI claimants. Prompt reemployment helps claimants quickly reestablish earning power, increases economic activity, and saves UI funds from paying more benefits than necessary.

**ATTACHMENTS**

None.



# Quality Assurance

From: Adrian Lopez, CEO

Presented by: Dr. Ricardo Ramirez, Director of Quality Assurance

November 13, 2023





# Summary

## *Quality Assurance (QA) monitoring activities:*

- *TWC Annual Monitoring*
  - *Draft Plan for Responses*
- *Quality Assurance Update*
- *Monitoring Outcomes & Technical Assistance*
- *TWC Performance – Claimant Reemployment Within 10 Weeks*

*Staff are not requesting Board action at this time.*



# TWC Annual Monitoring – Exit Conference Report



TWC conducted its Annual Monitoring and completed the onsite testing from October 10<sup>th</sup> through the 24<sup>th</sup>. The Exit Conference Report included the following items (these may change when TWC issues the Final Report):

## *Fiscal Disbursements (repeat finding, and potential questioned costs):*

- Syndicate Wave – Procurement Consultant
- Martin & Drought – Legal

## *Leases (repeat finding):*

- Marbach Workforce Center
- San Antonio Food Bank
- Port Authority of San Antonio

# TWC Annual Monitoring – Exit Conference Report



## *Procurements:*

- *Professional Development Training Services for Childcare Providers*
- *Mechanical Services (Handyman)*

## *Personal Identifiable Information (PII):*

- *TWC Walkthrough at the Marbach Workforce Center*
  - *Lack of barriers to cover/secure PII at the reception desk*
  - *Unsecured emails and passwords in staff cubicle*

## *Next Steps:*

- *Initial Resolution Notification with 45 days for WSA to resolve issues.*

## Update:

In the 2023 monitoring report, TWC indicated that the Board improperly amended two (2) contracts by adding services to existing scope and increasing costs not provided for by the original proposal solicitation and contract documents. Amending contracts beyond the original scope, length, and amount is not permitted unless provided for in the original contract.

Item	Point at Issue	Issue
<b>Legal Services Contract</b>	Amended to increase the budget	The contract exceeded the budget of \$90,000 annually
<b>Procurement Consultant Contract</b>	Extended and increased scope of the contract and increased the budget	The contract exceed budget of \$20,700 over a four-month period
<b>Lease – San Antonio Food Bank</b>	Needs Determination and Market Assessment were improperly dated.	Needs Determination and Market Assessment were dated after lease execution.
<b>Lease – Port Authority San Antonio</b>	Needs Determination and Market Assessment were improperly dated.	Needs Determination and Market Assessment were dated after lease execution.

**Controls Update:** As an outcome of the recommendations and technical assistance provided from TWC, the Board shall take the following steps to continue to strengthening controls around procurement processes.

- Develop expenditure tracking processes and reporting monitor budget spend rates to prevent exceeding unauthorized contract expenditures.
- Revise Standard Operating Procedures to outline the conditions for amending contracts, including proper procedures adding additional services that were not originally procured.
  - Procurement staff will expand coordination with the Fiscal department, Programs and Operations, and Quality Assurance as appropriate to obtain necessary information to complete each amendment.
  - Include topic in monthly Board staff training.
- The Board staff will conduct a subsequent internal review of all property leases. This process will further analyze the existing leases to ensure they align with the TWC's Financial Manual for Grants Contracts, and WSA Lease Procurement procedures.

# TWC Monitoring



- *TWC Equal Opportunity (EO) Monitoring*

TWC started its EO monitoring. Ms. Caroline Goddard, WSA's Equal Opportunity Officer leads the engagement. We have not received a draft or final report.

- *Child Care and Development Fund (CCDF)*

TWC completed the engagement and submitted a final report with no errors or concerns with improper payments. Child Care Board staff reports the item to the Early Care & Education Committee.

# Other Monitoring Activities



- *Office of Child Care (OCC)*

OCC Texas Monitoring Review will monitor child care. Child Care Board staff will report the item to the Early Care & Education Committee.

- *Health & Human Services Commission (HHSC)*

HHSC has started monitoring SNAP E&T fiscal transactions. The Fiscal department will report the item to the Audit & Finance Committee.

# External Monitoring (Ms. Nguyen, CPA)



- ***WIOA Youth – SERCO:*** 100% complete, 95.52% accuracy rate. The following items were highlighted for continuous improvement:
  - Support Services (\$34.13 reimbursement due to WSA);
  - Incentives (\$50 reimbursement due to WSA);
  - Performance outcomes.
- ***Monitoring Contract Renewal:*** WSA is renewing Ms. Nguyen’s contract for one additional year (the 1<sup>st</sup> of a four-year renewal option).

# Internal Monitoring Activities

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- *Reemployment Services and Eligibility Assessment (RESEA) – C2 GPS:*  
100% complete, 93.3% accuracy rate. Two items highlighted for continuous quality improvement:
  - Individual Employment Plan – Employment Goal
  - Individual Employment Plan – Review Date

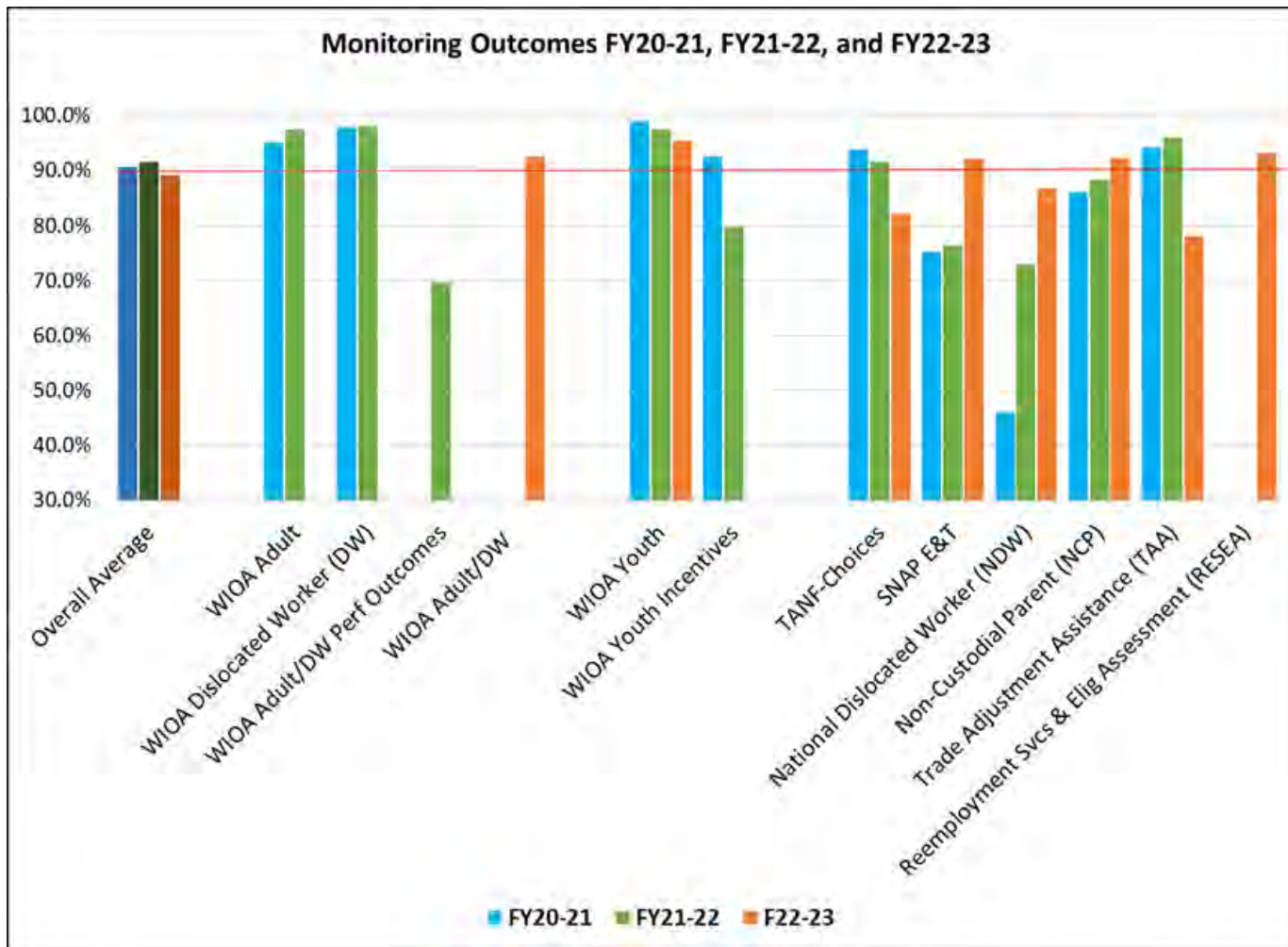


# Other Activities



- *Digitizing Paper Records*: 100% complete, project led by Trema Cote, WSA Workforce Monitor. Included digitizing participant hard-copy paper records.
- *Technical Assistance (TA)*: Supporting WSA departments and subrecipients with TA to help improve areas with low accuracy rates, policy development, and other processes.

# Briefing – Monitoring Outcomes

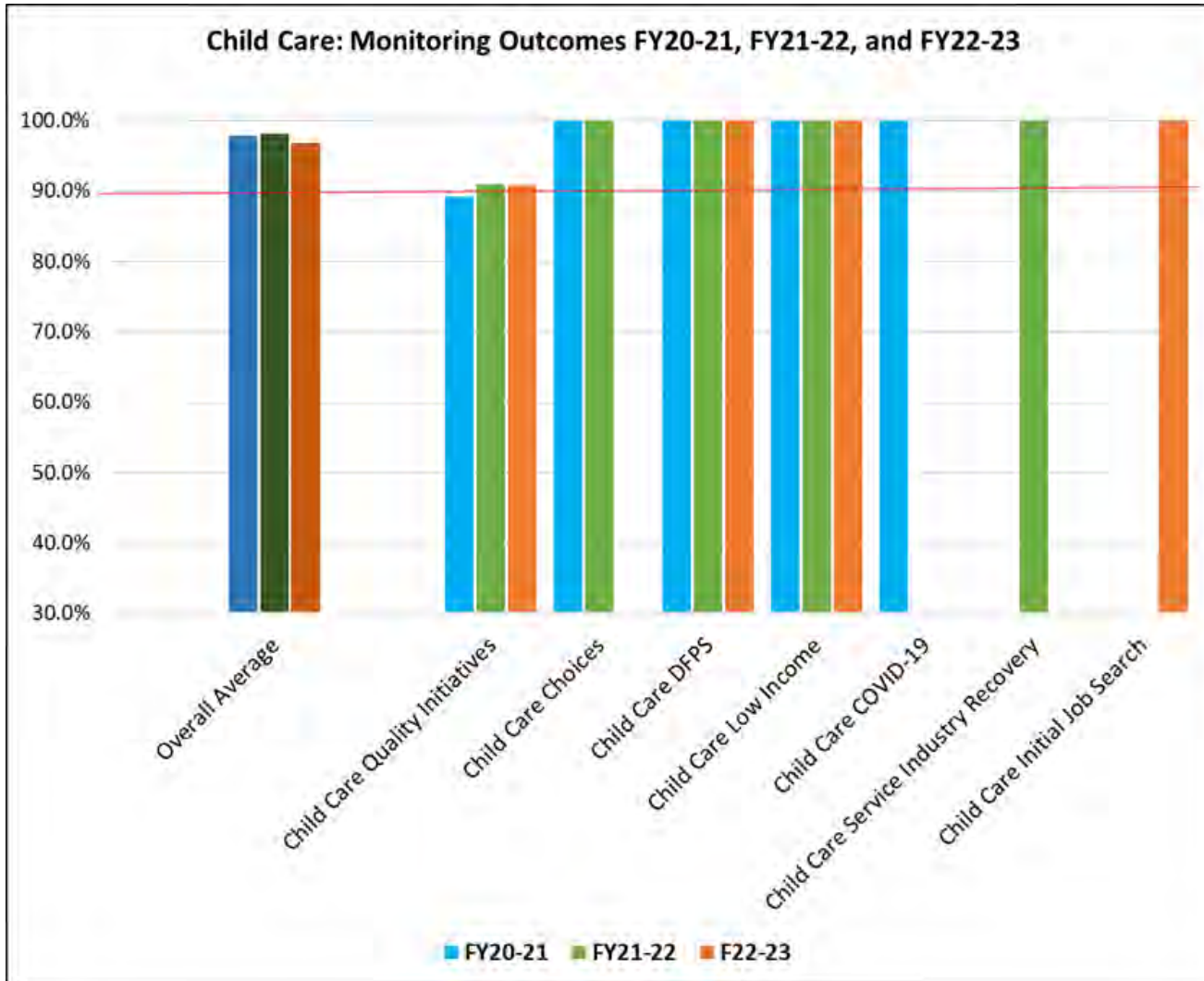


Added: WIOA Youth and Reemployment Services and Eligibility Assessment (RESEA)

The chart summarizes outcomes of monitoring engagements for FY20-21, FY21-22, and FY22-23.

The red line highlights the 90% expected accuracy rate.

# Briefing – Monitoring Outcomes



The chart summarizes outcomes of monitoring engagements for Child Care in FY20-21, FY21-22, and FY22-23.

The red line highlights the 90% expected accuracy rate.

# Briefing – Technical Assistance



Most recent program monitoring reviews having attributes with accuracy rates less than 90% include:

- TAA, WIOA Youth, WIOA Dislocated Worker/Adult, TANF/Choices, SNAP E&T, and NCP.
- The SNAP E&T and NCP TWC Audit Resolution attributes have been resolved, but QA will continue supporting Programs/Operations to ensure WSA retains compliance
- TWC placed WSA in an informal performance improvement action plan for:
  - WIOA Dislocated Worker Measurable Skills Gains (MSGs) and Credential Rate

# TWC Performance – Claimant Reemployment



TWC contracts boards for two Reemployment & Employer Engagement Measures (REEMS), one of which includes:

- The Claimant Reemployment within 10 Weeks (“Claimant Reemployment”).

## Definition

Based on work search reemployment requirements, the percentage of claimants eligible to receive UI benefits who gain employment within ten (10) weeks. The performance period runs from July 1<sup>st</sup> to June 30<sup>th</sup>.

# Goal

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- Dislocation from work decreases household income, which increases poverty and income inequality.
- Further, unemployed workers represent untapped labor market potential, negatively impacting regional economic activity.
- The Claimant Reemployment measure aims to help affected workers quickly gain employment.

# Methodology

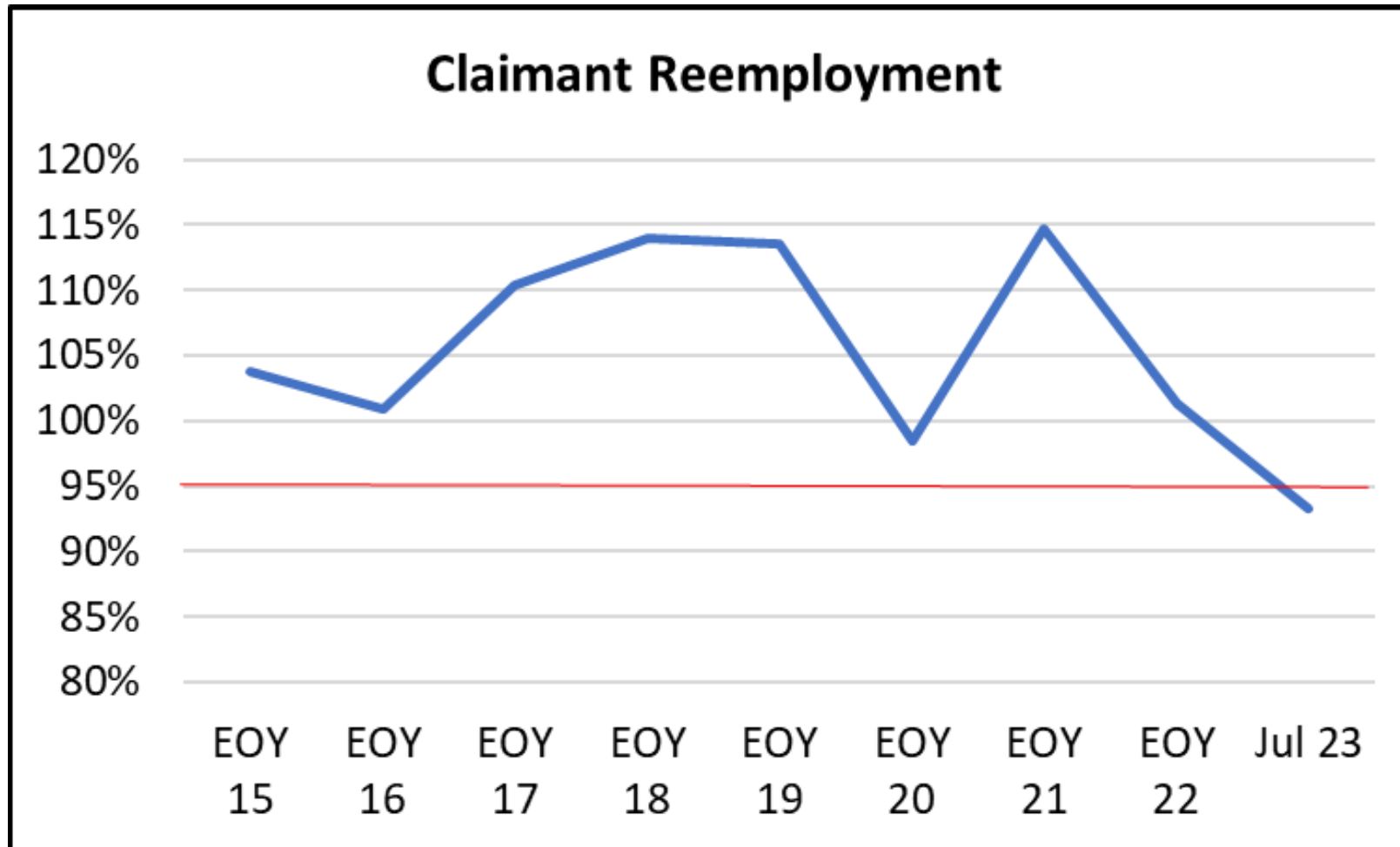


***Denominator.*** The number of monetarily eligible, initial claimants subject to work search requirements and active in WIT during the ten weeks before or after the initial determination of monetary eligibility.

***Numerator.*** The unduplicated number of persons from the denominator reemployed within ten weeks of the date their claim is first determined monetarily eligible or (if there was no WIT service in the ten weeks before the monetary eligibility date), the date of the first WIT service after determining them as monetarily eligible.

TWC reports the year-end performance in the September Monthly Performance Report (MPR).

# Current & Historical Outcomes



The graph shows Claimant Reemployment outcomes from EOY 2015 to July 2023.

Except for the current year, WSA has consistently met or exceeded the measures.

Meeting  $\geq 95\%$   
Source: TWC's MPR





Questions or Comments?

## MEMORANDUM

**To:** Oversight Committee

**From:** Adrian Lopez, CEO

**Presented by:** Teresa Chavez, COO

**Date:** November 13, 2023

**Subject:** Performance, Programs, and Operational Updates

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**Summary:** This item is to provide an update of Workforce Solutions Alamo programs and grants, including both adult and youth throughout the urban and rural areas. The following analysis provides insight to elements related to programs and performance and action items taken to enhance service delivery, cross-collaboration and integration across WSA programs.

### **Child Care Performance:**

For FY 2023 TWC set Alamo's target at 11,427. As of 10/19/2023, WSA's unofficial YTD average for September shows average enrollments of 12,010 or 106.29%, which reflects that we are currently in the above performance range, and have temporarily paused enrollment as we monitor attrition to remain within performance range and childcare budget.

- WSA has successfully placed 12,039 children in care, servicing 7,104 families.
- Alamo has 8,044 children on the waitlist, reflecting 4,880 families awaiting scholarship.
- Child Care contractor staff has begun to mail out intake packets, while continuing to manage intake, in order to cautiously ramp up enrollments.
- The breakdown according to age group on waitlist is as follows: 2,077 infants, 2,051 toddlers, 1,868 preschool, and 2,003 school age.

### **Child Care Quality:**

Contracted slots officially began with the first child enrolled on October 3, 2022. New centers continue to be called in order to confirm interest in Child Care Services Scholarship and are being emailed the Child Care Enrollment opportunity to confirm interest in contracted slots programs.

- Converse Christian, awarded 15 slots, has enrolled 8 children: 3 infants and 5 toddlers. 7 contracted seats remain available.
- De Paul, awarded 20 contracted slots, has enrolled 10 children: 4 infants and 6 toddlers. 10 contracted seats remain available.
- La Mision, awarded 15 slots, has enrolled 6 children: 2 infants and 4 toddlers. 9 contracted seats remain available.

### **Child Care Services:**

Since May, rural communities have had access to an in-person childcare representative. The childcare representatives are utilizing WSA rural offices, where space is available, and in Fredericksburg, utilizing space at Holy Spirit Lutheran Church, thanks to Pastor Bobby Vitek's openness to having the community serviced from his church.

### **Special Grants & Other Initiatives:**

#### **Student Hireability Navigators**

- The Hires Event concluded on October 12<sup>th</sup> at Datapoint with foot traffic of 90 participants and individuals applying for various jobs. SERCO has reported that 5 individuals were offered employment on that day with 1 full-time employment started. C2 is waiting for final numbers.
- Alamo Helping Hands Event with Southside First occurred on November 2, 2023, at the S. Flores WSA Career Center.
  - 25 vendors participated in the half-day event and represented unique service offerings for those with disabilities.
  - Featured was a post-secondary corner representing IDD University and College Certificate programs, Café College, Project Quest, Partners in Progress Certification programs, and WSA program services. Southside Districts participated in busing students from SAISD, Harlandale, and Burleson School of Innovation Disability Services.
  - VOS greeter placed attendance at 54 individuals availing themselves of community information.
  - Vocational Rehabilitation Accessibility Specialist provided hands-on demonstration of center equipment and other items available for individuals to assimilate into a successful career position.

**Training and Employment Navigator Pilot** aims to deter repeated victimization of sex-trafficked youth and foster youth ages 16-25 by aiding them in navigating workforce center services and increase their chances of securing employment. To date, this program has enrolled 9 participants in this quarter. Also, we have provided 1 paid work experience, and 6 participants have entered employment. TWC just renewed this grant for two more years October 1, 2022, through October 30, 2025. TWC also gave us a non-cost extension from October 1, 2023, to January 31, 2024.

**Military Family Support Program (MFSP)** provides active-duty military spouses with work experience, job search assistance, support services, and training. As of October 2023, 1 new participant has been enrolled for the 2023 Grant Year and 7 are still active from the 2022 contract year. Of these participants, 2 are enrolled in training. In addition, there are 7 new interested individuals and 3 clients have already reached out and are interested in training or employment. Contract date is atypical, January 1 through December 31, 2023.

**Middle Skills Pilot – Gears for Careers** provides necessary supplies, clothing, and support services for Texans preparing to join the workforce. Grant period is from March 8, 2023, through November 30, 2023 with an award amount of \$116,439. We have a total of 87 referrals and are currently setting sights on employers who require work-related tools. So far, we have assisted with rent, tools, and utilities.

**Re-employment Services and Eligibility Assessment (RESEA)** provides unemployment insurance (UI) claimants with a variety of services to support their re-employment before benefits expire. Grant has been renewed for BCY 23 for \$920,073. According to the last TWC report the board is at 93.7% of providing services within 7 days.

#### **Workforce Commission Initiatives - FY2023:**

- Hiring Red, White & You!: The event was held on November 2, 2023, at the Freeman Coliseum. There were 1,058 job seekers and 150 employers in attendance.
- Texas Veterans Leadership Program (TVLP): Provides support to two full-time TVLP staff at two WSA Centers - South Flores & Walzem. TVLP continues to provide support to veterans at these locations.

- Careers in Texas Industries - Career Pathways/Jobs Y'all Events: Provides career exploration in sector-based industries for youth in middle school, high school, and postsecondary.
- 2022 WCI Grant - Childcare Short-term Training to CCS Parents: Grant is specific to customers receiving childcare services through the Childcare Scholarship, COSA. Staff conducts outreach via childcare reports provided by the WSA Childcare Team. Grant ended May 31, 2023.

## WIOA Youth

The youth contractor provides youth participants with youth services that focus on out-of-school youth and in-school youth, with one or more barriers to employment that help to prepare for employment and postsecondary education opportunities, attain educational and/or skills training credentials, and secure employment with career/promotional opportunities.

- Enrollments to Date:

WIOA YOUTH REPORT 2023-2024	Oct'23	TOTAL
<b>Enrollments - URBAN</b>		
In-School Youth	0	0
Out-of-School Youth	12	12
<b>Enrollments - RURAL</b>		
In-School Youth	2	2
Out-of-School Youth	7	7
<b>Services</b>		
Occupational/Vocational Training	7	7
Work Experience	6	6
Supportive Services	53	53
Educational Services (GED)	2	2
Follow-Up	1	1

The Youth Participant Planning Summary (PPS) includes participant enrollment and key service targets. PPS to Date:

PPS WIOA YOUTH 2023-2024	NEW			YEAR END GOAL	YEAR END GOAL %
	Q1 OCT-DEC'23	Q2 JAN-MAR'24	Q3 APR-JUN'24		
Urban Participants Planned	76	153	77	306	
Actual New Enrollments	12			12	4%
Rural Participants Planned	23	44	21	88	
Actual New Enrollments	9			9	10%
Work Experience Career Opportunities Planned	91	182	92	365	
Actual	6			6	2%
Education/Training Planned	10	19	10	39	
Actual	7			7	18%
Supportive Services Planned	80	160	79	319	
Actual	53			53	17%

- Youth Work Experience (WEX)
  - Work experience opportunities exist in both urban and rural areas and are available to youth ages 16-24.
  - There are currently 6 WEX agreements in place at the start of the new program year.
  - Targeted industries include Health, Education, Manufacturing, IT/Cybersecurity, and Construction.
- Youth Career Exploration and Events

In FY2023, WSA shifted from one large event to several smaller, industry focused events. This will support the engagement of youth at different locations, including both rural and urban areas, and

targeting of a variety of industries and youth sub-populations. In addition, it will provide youth opportunities to attend multiple events over the course of the year and provide a greater variety of career exploration, resources, and employer interactions. Event dates for BCY 2023 include:

- January 19th and 26<sup>th</sup>: Northeast Lakeview College
- January 10, 2024: Seguin City Coliseum
- April 2024 – Atascosa County
- September – Alamo Colleges District

Additional youth events are being explored with key partners, dates and times TBD.

**SA Ready to Work** has finalized all seven subprime contracts.

- Ready to Work is a one-of-a-kind program to help San Antonio residents find easy access to education and quality jobs. WSA is the largest funded COSA partner, \$105,781,953.00 and includes 7 subgrantees providing case management, training/certification, and job placement. Ready to work is funded by a 1/8 cent sales and use tax collected through December 2025.
- Year to date WSA has interviewed/intakes 3,952 individuals and has case managed/enrolled 2,310 in training with 251 already completing their training. 118 participants have gained employment and earn more than \$15.00 per hour. The average wage of those graduates securing employment is \$17.00, well above the requirement. The top training courses being selected are medical, IT, and construction. \*Data is from 10.31.23.
- The City of San Antonio has created a Strategic Catalogue Committee. This committee has members from all 4 primes and some sub primes. They will streamline the current catalog and help our participants select courses that will better help them be placed in quality jobs.
- Workforce Solutions Alamo and The City of San Antonio are in the planning stages of a large job fair on November 29, 2023. The focus will be CDL (Commercial Driver's License) and graduates unplaced for all sub-primes. Together with the city's help, this should yield well.

**Alternatives:**

No alternatives are being considered at this time.

**Fiscal Impact:**

No additional fiscal impact currently.








# Performance, Programs & Operational Updates

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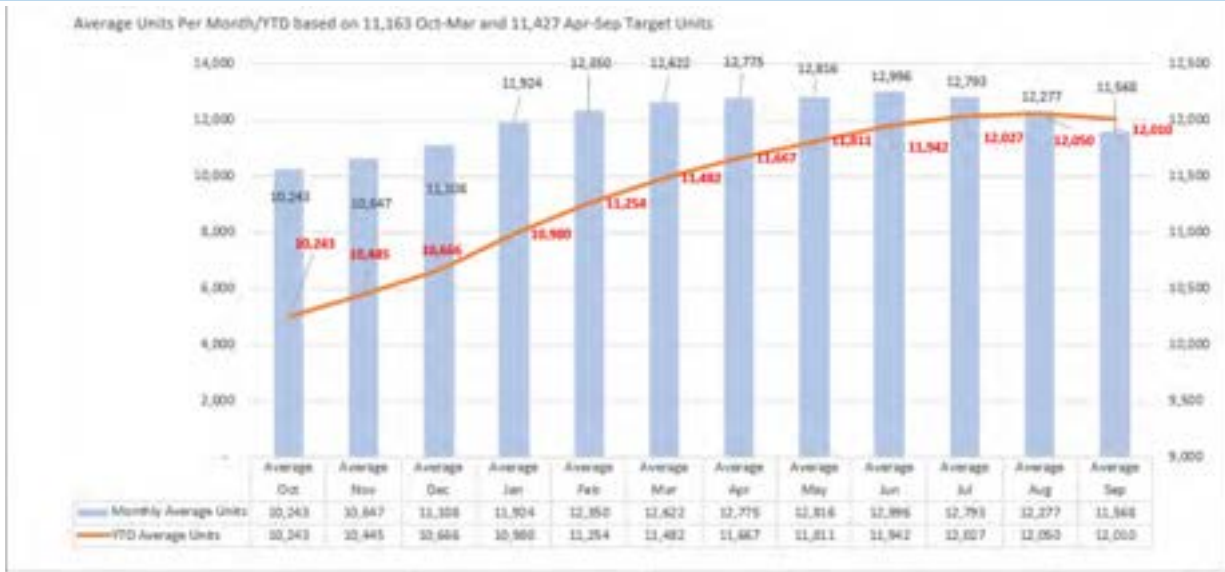


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# Operational Updates

Item	Description	On target
1	WSA continues to perform well on overall expenditures and outcomes.	
2	Child Care is trending at 106.29% for children served.	
3	Student HireAbility Hiring event was a success.	
4	WIOA Adult Grants & Initiatives	
5	The Middle Skills Employment Pilot Program is designed to support Texans preparing to join the workforce or who have upskilled and gained new employment.	
6	WIOA Youth	
7	Ready to Work current enrollment: 2,310 participants in training. Healthcare industry continues to be the industry of choice for many participants seeking training.	

# Child Care Performance Briefing FY 2023\* Data as of 10/19/2023



	Oct	Nov	Dec	Jan	Feb	March	Apr	May	Jun	Jul	Aug	Sep
	Average	Average	Average	Average	Average	Average	Average	Average	Average	Average	Average	Average
Monthly Average %	91.76%	95.38%	99.50%	106.82%	110.64%	113.07%	111.79%	112.16%	113.73%	111.96%	107.44%	101.23%
YTD Average Units %	91.76%	93.57%	95.55%	98.36%	100.82%	102.86%	104.14%	105.14%	106.09%	106.68%	106.75%	106.29%

WSA's unofficial YTD avg for FY 2023 is 106.29%

**CCDF Performance Status Methodology**  
 Year-to-Date numbers to calculate performance  
 MP = 95%-105%  
 +P = 105% or above  
 -P = <94.99

**SIR Performance Methodology**  
 Actual enrollments





# Child Care Performance Briefing FY 2023 <sup>\*</sup> *Data as of 10/19/2023*

	Oct	Nov	December	Jan	Feb	March	Apr	May	June	July	August	September
	Average	Average	Average	Average	Average	Average	Average	Average	Average	Average	Average	Average
Choices	237	229	209	203	201	198	196	186	190	194	182	189
TANF						4						
Low Income	9,554	9,938	10,419	11,210	11,618	11,868	11,983	11,991	12,139	11,920	11,393	10,688
Former DFPS	382	401	392	419	428	439	476	511	515	530	553	553
Homeless	70	79	88	92	103	114	120	128	152	150	149	138
Monthly Average Units	10,243	10,647	11,108	11,924	12,350	12,622	12,775	12,816	12,996	12,793	12,277	11,568
Monthly % Average	91.76%	95.38%	99.50%	106.82%	110.64%	113.07%	111.79%	112.16%	113.73%	111.96%	107.44%	101.23%
YTD Average Units	10,243	10,445	10,666	10,980	11,254	11,482	11,667	11,811	11,942	12,027	12,050	12,010
YTD % Average	91.76%	93.57%	95.55%	98.36%	100.82%	102.86%	104.14%	105.14%	106.09%	106.68%	106.75%	106.29%
TWC Target	11,163	11,163	11,163	11,163	11,163	11,163	11,427	11,427	11,427	11,427	11,427	11,427



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# Alamo Early Learning Centers data as of 10/19/23

**Total # of Currently Certified Centers** **174**

2 Star	6
3 Star	40
4 Star	128

Percentage of TRS/CCS

Location	Programs	CCS Programs*	TRS Programs	Percentage TRS of CCS Programs
Bexar Early Learning Programs	786	439	144	33%
Rural Early Learning Programs	259	135	26	19%
<b>Total</b>	<b>1045</b>	<b>574</b>	<b>170</b>	<b>30%</b>



# Student HireAbility Navigators



- The Hires Event concluded on Oct 12<sup>th</sup> at Datapoint Career Center. 90 participants attended this event. 5 individuals were offered employment on that day with 1 full-time employment started.
- Alamo Helping Hands Event with Southside First occurred on Nov 2, 2023, at the S. Flores WSA Career Center.
  - 25 vendors participated in the half-day event and represented unique service offerings for those with disabilities.
  - Featured was a post-secondary corner representing IDD University and College Certificate programs, Café College, Project Quest, Partners in Progress Certification programs, and WSA program services. Southside Districts participated in busing students from SAISD, Harlandale, and Burleson School of Innovation Disability Services.
  - VOS greeter placed attendance at 54 individuals availing themselves of community information.
  - Vocational Rehabilitation Accessibility Specialist provided hands-on demonstration of center equipment and other items available for individuals to assimilate into a successful career position.



# 2022 Workforce Grants & Project Updates

## Training and Employment Navigator Pilot

**\$192,946**

Aims to deter repeated victimization of sex-trafficked youth and foster youth ages 16-25 by aiding them in navigating Workforce Center services and increase their chances of securing employment or obtaining higher education.

Target Enrollment	Q6 Active Enrollment	Total YTD Participants Served
12	9	92

Timeline: October 1, 2022 - October 30, 2025  
In April 2023, grant was extended for two more years. A no cost grant extension was done until January 31, 2023.



# 2023 Workforce Grants & Project Updates

## Military Family Support Prog. (MFSP)

**\$221,896**

For BCY 2023:		
New Enrollment	Training	Support Services
1	2	0

Timeline: January 1, 2023 - December 31, 2023

### Targeted Industries:

 Health  IT/Cybersecurity

Provides active-duty military spouses with job search assistance and training.

- Strengthening partnership with JBSA, US Chamber of Commerce Foundation-Hiring Our Heroes, Spouse Networking Groups
- Braiding Ready to Work



# 2023 Workforce Grants & Project Updates

## Gears for Careers: Middle Skills Pilot

**\$116,439**

Timeline: March 8, 2023 – March 7, 2024

The Middle Skills Employment Pilot Program is designed to support Texans preparing to join the workforce or who have upskilled and gained new employment. Services provided :

- **Supplies**
- **Clothing**
- **Other support services**

<b>BCY23</b>
<b>Referrals</b>
87

Priority clients:

- Incarcerated at local correctional facilities and scheduled to be released within 60 days
- Veterans or Military Spouses
- Foster Youth/Former Foster Youth



Or use the link below:

<https://bit.ly/WSA-GearForCareers>



# 2022 Workforce Grants & Project Updates

## Re-Employment Services and Eligibility Assessment (RESEA)

**\$920,073**

Provides Unemployment Insurance (UI) claimants a variety of services to support their re-employment before benefits expire. Prior year funds expended. **Grant renewed for BCY23.**

- **For WSA** – per last TWC report, monthly RESEA reporting is at 93.7%.
- "RESEA services are required within 7 days" - 80% completion rate required for boards in BCY 2023.



**Timeline: October 1, 2022 – September 31, 2023**

# 2023 Workforce Grants & Projects Updates

## WIOA Youth - Enrollments to Date & Participant Planning Summary (PPS)

WIOA YOUTH REPORT 2023-2024	Oct'23	TOTAL
<b>Enrollments - URBAN</b>		
In-School Youth	0	0
Out-of-School Youth	12	12
<b>Enrollments - RURAL</b>		
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Out-of-School Youth	7	7
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Education/Training Planned	10	19	10	39	
Actual	7	—	—	7	18%
Supportive Services Planned	80	160	79	319	
Actual	53	—	—	53	17%

Timeline: October 1, 2023 – September 30, 2024





# 2023 Workforce Grants & Project Updates



## Youth Partners - Work Experience

Work Experience opportunities exist in both urban and rural areas and are available to youth ages 16-24.

Current WEX Agreements	WEX Positions Available	Participant WEX Enrollment Target	Current Participant WEX Enrollment to Date
6	6	365	6



### Targeted Industries:

- Health
- Education
- Manufacturing
- IT/Cybersecurity
- Construction



# 2022 Workforce Grants & Project Updates

## Ready to Work Program

**\$105,781,953**

Ready to Work is a one-of-a-kind program to help San Antonio residents find easy access to education and quality jobs. Ready to Work is funded by a 1/8 cent sales and use tax collected through December 2025. \*Data 10.31.23.

FY22/24 Goals (April – June)	WSA Applicants Interviewed	Case Managed / Enrolled in Training	Completed Training	Placed in Quality Jobs
	6553	4372		
YTD	3952	2310	251*	118

### WSA Ready to Work Subgrantees

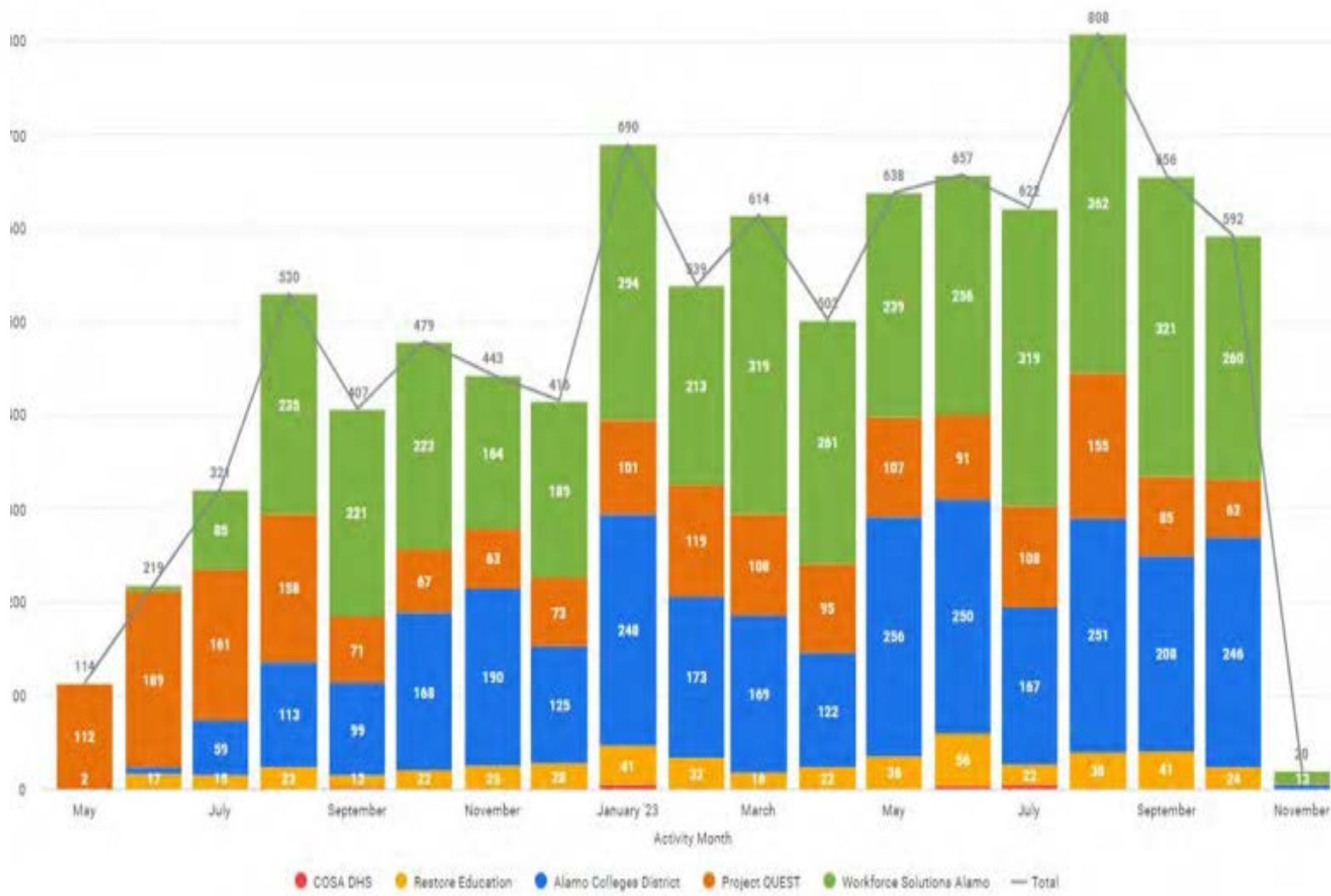
1. AVANCE
2. C2 Global
3. Chrysalis
4. Family Service Association
5. San Antonio Food Bank
6. Texas A&M San Antonio
7. YWCA San Antonio

\*Clients actively seeking employment: 133



Top trainings being selected: Medical, IT & Construction

# APPLICANTS INTERVIEWED



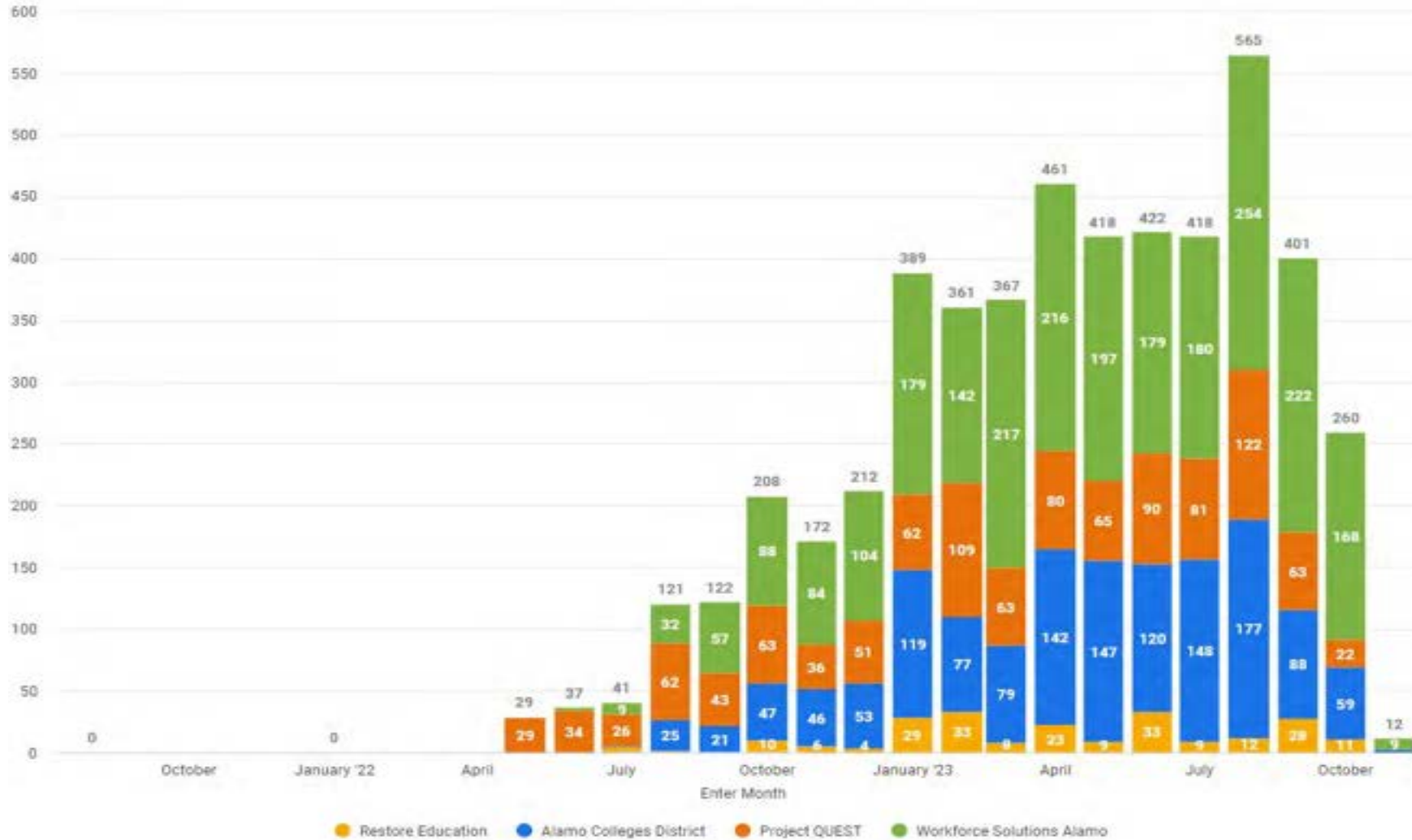
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1	2	0
2	17	6
3	15	85
4	23	235
5	13	221
6	22	222
7	25	164
8	28	189
9	41	294
10	32	213
11	16	319
12	22	261
13	36	239
14	56	256
15	22	319
16	38	362
17	41	321
18	24	260
19	0	13
<b>Totals</b>	<b>473</b>	<b>3,979</b>



\* Data from 11.3.23 pulled from COSA-Signify Monthly Stats Report. Data is live and changing daily.

# YEAR TO DATE - ENROLLED IN TRAINING

Enrolled in Training by Month



Enrolled in Training by Month

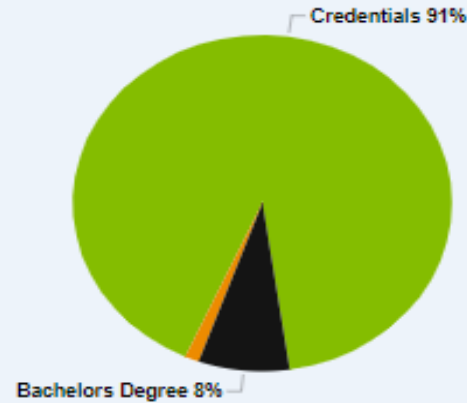
	Restore Education	Workforce Solutions Alamo
1	0	0
2	0	0
3	0	0
4	0	0
5	0	0
6	0	0
7	0	0
8	0	0
9	0	0
10	0	0
11	0	3
12	5	9
13	2	32
14	1	57
15	10	88
16	6	84
17	4	104
18	29	179
19	33	142
20	8	217
21	23	216
22	9	197
23	33	179
24	9	180
25	12	254
26	28	222
27	11	168
28	0	9
<b>Totals</b>	<b>223</b>	<b>2,339</b>



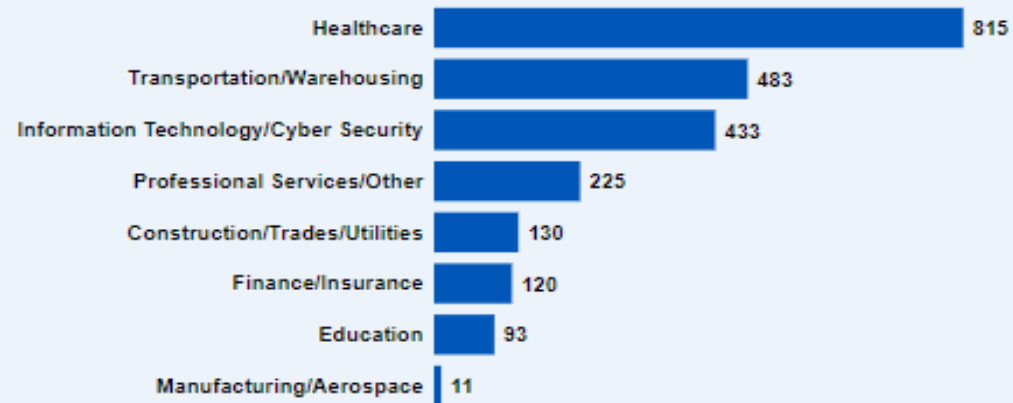
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# TRAINING BY INDUSTRY

Type of Credential



Enrollment by Target Industry



Successfully Completed Training

**251**

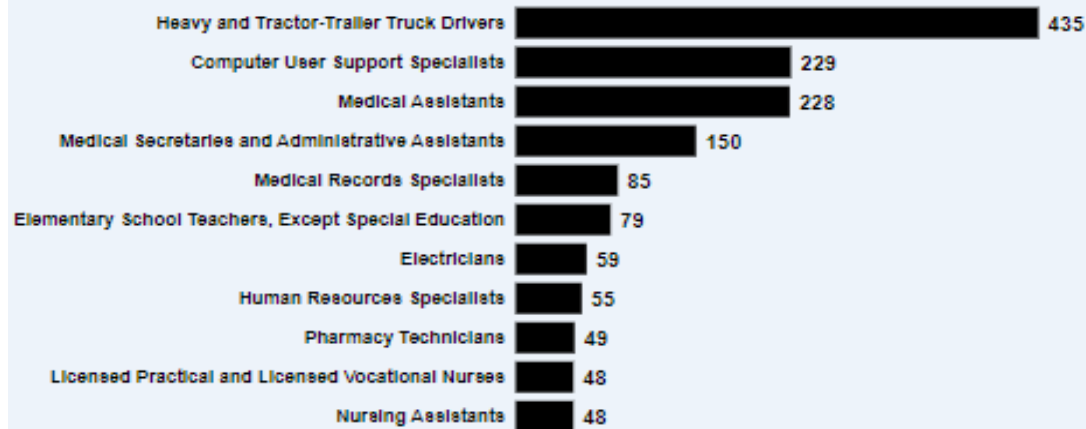
Training Retention Rate

**93%**

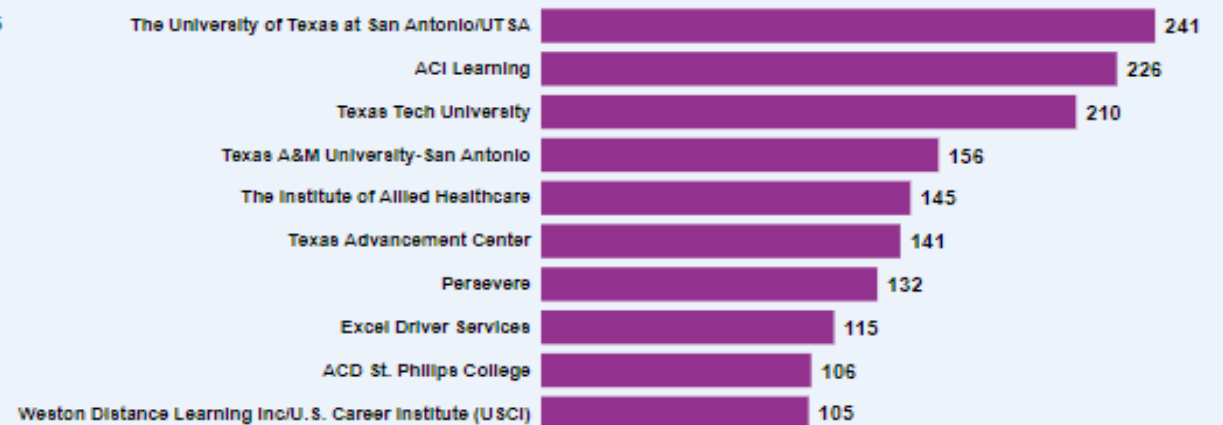
Successful Training Completion Rate

**60%**

Top 10 Training Occupations by Enrollment



Top 10 Training Providers by Enrollment

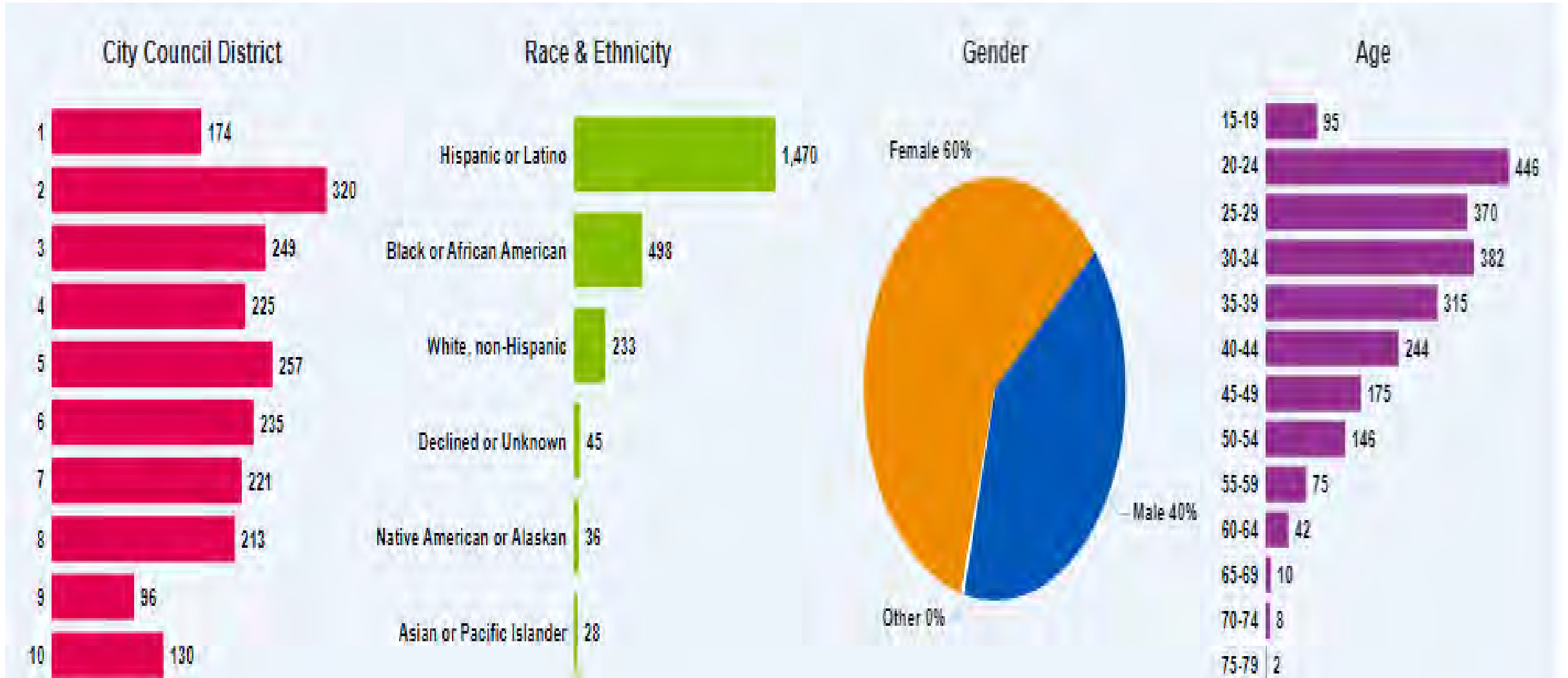


The City of San Antonio is sharing this data publicly in line with the program's guiding principle of transparency. This data is current as of 10/31/2023 and is subject to change on a daily basis. Hundreds of Ready to Work coaches manually input and update information in a central case management data platform as they work every day with program applicants and participants. Contact 210-207-JOBS (5627) or [RTWHelp@sanantonio.gov](mailto:RTWHelp@sanantonio.gov) with any questions or comments.



\* Data from 11.3.23 pulled from COSA-Signify Monthly Stats Report. Data is live and changing daily.

# TRAINING



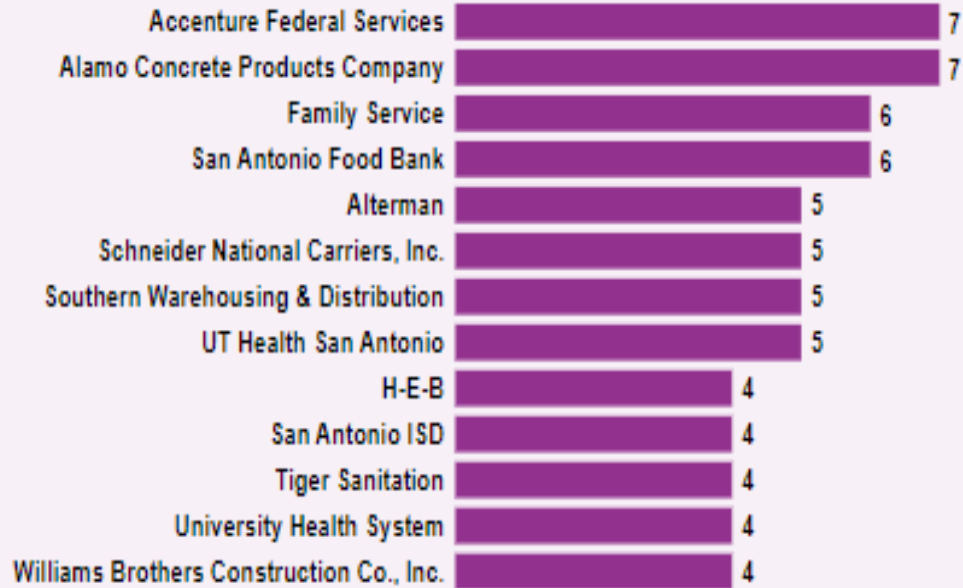
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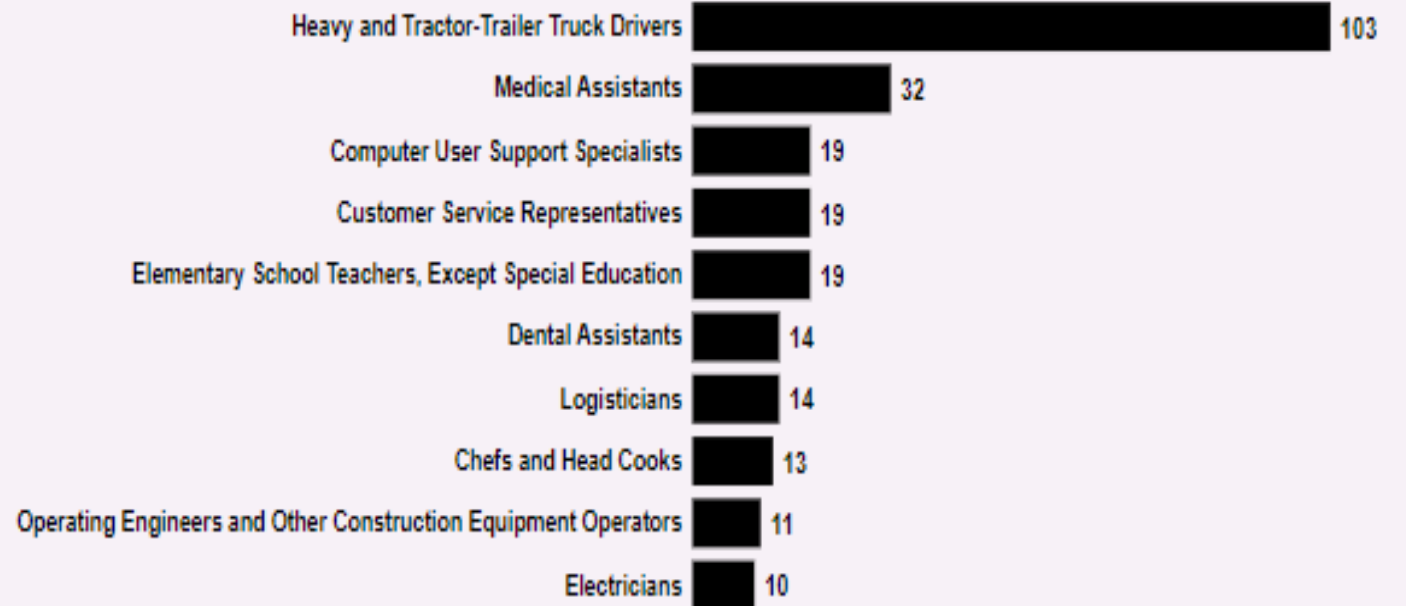
# PLACEMENTS

## Top Employers of RTW Graduates by Number of Hires

*Responsive only to Industry data filter*



## Top Occupations Hired



Employers Hiring RTW Graduates

**243**

Median Hourly Wage in New Job

**\$18.00**

Median Hourly Wage Increase from Intake

**\$15.00**

Median Annual Salary in New Job

**\$37,440**

Median Individual Income at Intake

**\$11,295**

% Placed in Quality Job within 6 months

**62%**

The City of San Antonio is sharing this data publicly in line with the program's guiding principle of transparency. This data is current as of 10/31/2023 and is subject to change on a daily basis. Hundreds of Ready to Work coaches manually input and update information in a central case management data platform as they work every day with program applicants and participants. Contact 210-207-JOBS (5627) or [RTWHelp@sanantonio.gov](mailto:RTWHelp@sanantonio.gov) with any questions or comments.



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Questions?



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